Oracle® Fusion Middleware
Building Portals with Oracle WebCenter Portal
11g Release 1 (11.1.1.9.0)
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Explains how to use WebCenter Portal to quickly build and manage a portal using Portal Builder.
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Part IV  Working with Portal Assets
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Preface

This guide describes how to use WebCenter Portal to work with portals using Portal Builder. It provides instructions for tasks such as creating, customizing, and administering portals and subportals; working with 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.

Note: This guide depicts the application user interface (UI) in screenshots. Portal designers can apply different templates to change the look and feel of a portal; therefore, your view of a portal may differ somewhat from the views depicted in screenshots.

Audience

This document 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

For more information, see the following documents in the Oracle Fusion Middleware 11g Release 1 (11.1.1.9.0) documentation set:

- Using Oracle WebCenter Portal
- Administering Oracle WebCenter Portal
- Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper
## Conventions

The following text conventions are used in this document:

<table>
<thead>
<tr>
<th>Convention</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>boldface</strong></td>
<td>Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.</td>
</tr>
<tr>
<td><em>italic</em></td>
<td>Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.</td>
</tr>
<tr>
<td><code>monospace</code></td>
<td>Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.</td>
</tr>
</tbody>
</table>
What's New?

The following topics introduce the new and changed features in Oracle WebCenter Portal 11g Release 1, and provide pointers to additional information:

- System Requirements and Specifications
- New and Changed Features for 11g Release 1 (11.1.1.9.0)
- New and Changed Features for 11g Release 1 (11.1.1.8.3)
- New and Changed Features for 11g Release 1 (11.1.1.8.0)

System Requirements and Specifications

For system and platform-specific information for Oracle Fusion Middleware products for 11g Release 1, refer to Oracle Fusion Middleware System Requirements and Specifications. That guide describes how to find out what is certified and how to verify the requirements of the certification. Your system administrator performs these tasks prior to installing Oracle WebCenter Portal.

New and Changed Features for 11g Release 1 (11.1.1.9.0)

In addition to numerous bug fixes, WebCenter Portal 11g Release 1 (11.1.1.9.0) includes the following new and changed features:

- Support for migration of the WebCenter Portal and Portal Framework application content from the Folders_g folder service to the FrameworkFolders folder service. See the "Migrating Folders_g to FrameworkFolders" appendix in Administering Oracle WebCenter Portal.

- Support for running WebCenter Portal in both local and cloud environments:
  - Portal on-premise: WebCenter Portal deployment in a customer data center.
  - Oracle Private Cloud: provisioning and running WebCenter Portal on Oracle MWaaS; that is, using Oracle EM Cloud Control.

- Support for upgrading a pre-11.1.1.8.0 portal to the current release. See Section 7.2.9, "Upgrading a Pre-11.1.1.8.0 Portal."

- Addition of the childCreation property for the Show Detail Frame component to specify when the children (contents) of the Show Detail Frame component are created, thus reducing processing time. See childCreation in the "Attributes of a Show Detail Frame Component" table in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.
Support for image renditions in Content Presenter display templates. See the "Using Image Renditions in Content Presenter Display Templates" section in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

New and Changed Features for 11g Release 1 (11.1.1.8.3)

WebCenter Portal 11g Release 1 (11.1.1.8.3) included the following new and changed features:

- Four new page templates that provide efficiency and performance enhancements over the existing page templates. See "New Page Templates."
- Support for the FrameworkFolders component that provides a scalable, high-performing folder service from Oracle WebCenter Content as an alternative to Folders_g. See "FrameworkFolders Support."

New Page Templates

Four new page templates provide efficiency and performance improvements over the existing page templates. The files included are:

- Four page templates: Skyros Side Navigation v2, Skyros Side Navigation (Stretch) v2, Skyros Top Navigation v2, and Skyros Top Navigation (Stretch) v2
- One skin: Skyros v2

This is the preferred skin for the new page templates. Do not attempt to use the new Skyros v2 skin with existing page templates. Likewise, do not attempt to use the new page templates with the existing skins.

- Two task flows: Portal Side Navigation and Portal Top Navigation

These task flows implement the navigation in the page templates, either in a side pane or as tabs along the top of a portal. The styling of the navigation in these task flows relies on the CSS in the skin file available in this patch. If you want to use these task flows in a page template that uses a different skin, be aware that the navigation may not look as expected due to CSS mismatches in the skin. However, if you copy and paste the navigation sections from the new Skyros v2 skin source code into your skin source code, you can achieve the expected results.

With WebCenter Portal 11g Release 1 (11.1.1.9.0), these files are pre-installed, and you will see them on the Shared Assets page, which is available if you have the permissions of the Administrator or Application Specialist role:

<table>
<thead>
<tr>
<th>Asset Type</th>
<th>File Names</th>
</tr>
</thead>
<tbody>
<tr>
<td>Page Templates</td>
<td>pageTemplate_Skyros_Side_Navigation_Stretch_v2.ear</td>
</tr>
<tr>
<td></td>
<td>pageTemplate_Skyros_Side_Navigation_v2.ear</td>
</tr>
<tr>
<td></td>
<td>pageTemplate_Skyros_Top_Navigation_Stretch_v2.ear</td>
</tr>
<tr>
<td></td>
<td>pageTemplate_Skyros_Top_Navigation_v2.ear</td>
</tr>
<tr>
<td>Skins</td>
<td>skin_Skyros_v2_Skin.ear</td>
</tr>
<tr>
<td>Task Flows</td>
<td>taskFlow_Portal_Side_Navigation.ear</td>
</tr>
<tr>
<td></td>
<td>taskFlow_Portal_Top_Navigation.ear</td>
</tr>
</tbody>
</table>

Perform the following steps to use the new page templates:
To set a new default page template for pages in the Home portal and all new portals (when the portal’s template does not specify that a particular page template must be used), see the “Choosing a Default Page Template” section in Administering Oracle WebCenter Portal.

To change the page template used by an individual portal, see Section 7.3.2, "Changing the Page Template for a Portal."

To change the preferred skin used by a page template, see Section 21.5, "Setting the Preferred Skin for a Page Template."

For more information, see Chapter 21, "Working with Page Templates" and the "Developing Page Templates" chapter in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

FrameworkFolders Support

Previously, Oracle WebCenter Portal supported only Folders_g. WebCenter Portal 11g Release 1 (11.1.1.8.3) enables new installations of Oracle WebCenter Portal to be integrated with FrameworkFolders. Existing installations of Oracle WebCenter Portal patched to 11g Release 1 (11.1.1.8.3) must continue to use Folders_g.

The FrameworkFolders component provides a scalable hierarchical folder interface for accessing and organizing repository content, and is the recommended enterprise folder service for Content Server.

New and Changed Features for 11g Release 1 (11.1.1.8.0)

- Terminology changes:

<table>
<thead>
<tr>
<th>Prior Releases</th>
<th>11g Release 1 (11.1.1.8.0)</th>
</tr>
</thead>
<tbody>
<tr>
<td>WebCenter Portal: Spaces</td>
<td>WebCenter Portal</td>
</tr>
<tr>
<td>space</td>
<td>portal</td>
</tr>
<tr>
<td>space template</td>
<td>portal template</td>
</tr>
<tr>
<td>resource</td>
<td>asset</td>
</tr>
</tbody>
</table>

- End-User Experience
  - Updated profile user interface that includes improved organization of profile information, click to edit, and clear profile photo functionality. See the "Managing Your Profile" chapter in Using Oracle WebCenter Portal. Additional documentation for the rich user profile is referenced under Portal Builder, Administration, and Development Environment.
  - Improved search experience (supported with Oracle SES 11.2.2.2) that includes faceted search and document thumbnails. See the "Searching for Information" chapter in Using Oracle WebCenter Portal and Chapter 55, "Adding Search to a Portal."

- Portal Builder
  - Simplified portal creation that includes in-place page creation. See Chapter 2, "Creating and Building a New Portal."
  - Redesigned portal edit and administration user interface (Portal Builder) that consolidates tasks into fewer steps. See Chapter 6, "Editing a Portal" and Chapter 7, "Administering a Portal."
Simplified page creation and editing: Web (for editing) and Data (for managing) views, inline resource catalog (with support for component drag-and-drop onto a page), and Select view. See Part III, "Working with Portal Pages."

Automatic update of portal navigation as new pages are created. See Section 12.2.2, "Creating a Page or Subpage in an Existing Portal."

"Lazy provisioning" of tools: WebCenter Portal configures the back-end server at first use of a tool rather than at portal creation to speed the successful creation of a new portal. See Section 2.1, "About Creating a New Portal."

Hierarchical page support (subpages). See Section 12.2, "Creating Pages or Subpages in a Portal."

Updated profile user interface that includes improved organization of profile information, click to edit, and clear profile photo functionality; new component properties for improved control of people connections and activity graph components. See Chapter 40, "Adding Activity Graphs and Recommendations to a Portal," Chapter 45, "Adding Connections to a Portal," and Chapter 53, "Adding Profiles to a Portal." Additional documentation for the rich user profile is referenced under End-User Experience, Administration, and Development Environment.

Device Settings that control how your portal pages render on different devices, such as smart phones, tablets, and desktop browsers. Page variants can be created to target and optimally render a portal on specific groups of devices like iOS phones, iOS tablets, and others. See Section 7.11, "Administering Device Settings in a Portal," Chapter 9, "Managing Device Groups for a Portal," and Section 12.3, "Creating a Page Variant for a Device Group." Additional documentation for device support is referenced under Administration and Development Environment.

Responsive Content Presenter templates that provide an example of how you can use Content Presenter and CSS3 media queries to produce a responsive layout that adjusts to the width of the browser (for example, on smart phones, tablets, and desktop browsers). See Section 33.7, "Using Responsive Templates." Additional documentation for device support is referenced under Development Environment.

Administration

Simplified WebCenter Portal administration that includes a power user oriented experience with familiar concepts for legacy WebCenter Portal customers. See the "Managing Portals in Portal Builder Administration" part in Administering Oracle WebCenter Portal.

New profile configuration settings that include properties to specify whether to show the new or legacy profile user interface and to specify profile synchronization settings. See the "Managing People Connections" chapter in Administering Oracle WebCenter Portal. Additional documentation for the rich user profile is referenced under End-User Experience, Portal Builder, and Development Environment.

Device Settings that control how your portal pages render on different devices, such as smart phones, tablets, and desktop browsers. Page variants can be created to target and optimally render a portal on specific groups of devices like iOS phones, iOS tablets, and others. See the "Deploying Devices and Device Groups" section, the "Creating a Page Variant of a System Page for Device Groups" section, and the "Administering Device Settings" chapter in
Administering Oracle WebCenter Portal. Additional documentation for mobile support is referenced under Portal Builder and Development Environment.

- Impersonation, which allows a privileged user to impersonate another user for the purposes of verifying the other user’s experience in WebCenter Portal and troubleshooting unexpected results. See the “Managing Impersonation” chapter in Administering Oracle WebCenter Portal.

- Improved portal lifecycle tools that enable export/import and backup/recovery of one or more portals with minimal downtime. See the "Deploying Portals, Templates, Assets, and Extensions" and "Managing WebCenter Portal Backup, Recovery, and Cloning" chapters in Administering Oracle WebCenter Portal.

- Integrated Oracle WebCenter Portal’s Pagelet Producer user interface within WebCenter Portal’s administrative user interface to make system administrators aware of the existence of Pagelet Producer pagelets and to allow them to make these pagelets available to end users. Integrating the UIs also provides Pagelet Producer developers to easily navigate from WebCenter Portal where they see the pagelets to the Pagelet Producer Admin UI so they can create new or edit existing pagelets. See the “Managing the Pagelet Producer” chapter in Administering Oracle WebCenter Portal.

- New page performance analyzer that shows you how long individual components take to display on a portal page, as well as the overall time taken to display a page. This new tool is useful to developers who are performing first level performance analysis, customers who build their own pages, and any user who customizes pages in WebCenter Portal. See the "How to Identify Slow Page Components" section in Administering Oracle WebCenter Portal.

Development Environment

- Updated profile user interface that includes improved organization of profile information, click to edit, and clear profile photo functionality; new component properties for improved control of people connections and activity graph components. See the "Introducing the People Connections Service," "People Connections Task Flow Binding Parameters," and "Integrating the Activity Graph" chapters in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper. Additional documentation for the rich user profile is referenced under End-User Experience, Portal Builder, and Administration.

- Developers can use Expression Language (EL) to retrieve information about Device Settings. Device Settings control how your portal pages render on different devices including smart phones, tablets, and desktop browsers. See the "EL Expressions Related to Device Settings" section in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper. Additional documentation for mobile support is referenced under Portal Builder and Administration.

- Responsive Content Presenter templates that provide an example of how you can use Content Presenter and CSS3 media queries to produce a responsive layout that adjusts to the width of the browser (for example, on phones, tablets, or personal computers). See the “Using Responsive Templates” section and the “Extending Responsive Templates” section in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper. Additional documentation for mobile support is referenced under Portal Builder.

- Simplified custom shared library development and deployment. WebCenter Portal provides a new JDeveloper template that enables you to build custom components, such as task flows, data controls, and managed beans and deploy them in shared libraries directly to the WebCenter Portal server. See the
"Developing Components for WebCenter Portal Using JDeveloper" chapter in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

- Developers can optionally customize the name of child components when viewing the Child Component tab in the Component Properties dialog for the parent component. Doing so assigns a unique display name for any component to make it easily distinguishable from other components of the same type on the Child Components tab. See the "Customize the Display Name of Child Components" section in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

- Restructured documentation library according to personas and their roles in WebCenter Portal:
  - Building Portals with Oracle WebCenter Portal (this guide) covers information needed by an application specialist who works in Portal Builder to create and administer portals, their structure (hierarchy of pages, navigation, security), and their content (components on a page, layout, behavior, and so on).
  - Using Oracle WebCenter Portal covers information needed by 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.
  - Administering Oracle WebCenter Portal covers information needed by 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.
  - Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper covers information needed by a developer who primarily works with JDeveloper to provide support for both portals and WebCenter Portal Framework applications.

For more information, see "Who's Who."
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. For example, this guide is aimed at the Application Specialist or advanced Knowledge Worker personas.

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

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 Moderator will likely assign Karen the Viewer or Participant role, or a custom role that offers a similar set of permissions.
For more information about roles and permissions, see the "About Roles and Permissions for a Portal" section in *Building Portals with Oracle WebCenter Portal*.

**Knowledge Worker Tasks in WebCenter Portal**

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

- Connecting to and collaborating with other WebCenter Portal users by sharing information, files, and links; and by interacting through instant messaging, mail, message boards, discussions, 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, exploring recommendations from other users, viewing the activities of the portals she is a member of and users she's connected to, viewing announcements, taking polls, and monitoring WebCenter Portal RSS feeds
- Staying organized through the use of favorites, notes, calendars, lists, links to portal objects, and tags
- Viewing and responding to worklist items

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 for knowledge workers like Karen is in *Using 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 Portal Builder 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 Moderator role to manage the portal.

For more information about roles and permissions, see the "About Roles and Permissions for a Portal" section 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 (Composer) 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 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 Portal Builder) 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 portal page templates

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

**Developer**

Dave is a developer who provides support for both portals and WebCenter Portal Framework applications:

- Portals (Portal Builder)
Dave 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 primarily works with JDeveloper and leverages the WebCenter Portal Extension/WebCenter Portal Service Extension projects.

**Framework Applications**

Dave primarily works with JDeveloper to develop WebCenter Portal Framework applications. Once he has developed the application, he can package it as an EAR file and deploy it on the application server. In a typical environment, Dave would have JDeveloper configured with a SCM system and be working within a team with automated build and deploy processes.

**Developer Tasks**

Tasks that are typical of a developer like Dave include:

- Building and maintaining WebCenter Portal Framework applications
- Developing custom assets, like page templates and navigation components 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 for developers like Dave is in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

**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’s Portal Builder, 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 the "About Application Roles and Permissions" section in Administering Oracle WebCenter Portal.
System Administrator Tasks

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

- Uses Portal Builder administration to administer all portals (including import and export of portals) and security site-wide
- Uses Portal Builder administration to manage site-wide system pages, business role pages, and personal pages
- Uses Portal Framework application administration console to manage application-wide preferences, manage users and roles, manage assets, configure the content repository, create polls, register producers and external applications
- 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 for system administrators like Syed is in Administering Oracle WebCenter Portal and WebLogic Scripting Tool Command Reference.
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. If the portal design supports subportals, you will learn how to add subportals to an existing portal.

- Chapter 1, "Introduction to Building Portals with WebCenter Portal"
- Chapter 2, "Creating and Building a New Portal"
- Chapter 3, "Working with Portal Templates"
- Chapter 4, "Publishing a Portal"
- Chapter 5, "Working with Subportals"
This chapter provides an overview of the concepts and tasks that are covered in this guide, *Building Portals with Oracle WebCenter Portal*.

This chapter includes the following topics:

- Section 1.1, "About This Guide"
- Section 1.2, "Where Do I Start?"
- Section 1.3, "Concepts"
- Section 1.4, "Tasks"

### 1.1 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 using Portal Builder. It provides instructions for tasks such as creating, customizing, and administering portals and subportals; 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.

### 1.2 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 Portal Builder concepts that are necessary knowledge before you begin.

The following approach provides an efficient path to creating your new portal:

1. Review the *Planning a Portal with WebCenter Portal* guide.

   The *Planning* guide addresses the overall direction and implementation of your portal project, and will help you choose between a JDeveloper-centric approach with WebCenter Portal Framework (covered in *Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper*), or a browser-centric approach with Portal Builder (covered in this guide). Additionally, you will read about common portal use cases, and develop ideas for building your portal.

2. If you determine that Portal Builder is appropriate for building your portal, read Section 1.3, "Concepts."
3. For an overview of the range of tasks available to you in the development of a portal, review Section 1.4, "Tasks."

   Now you are armed with the basics, and are ready to begin!

4. Go to Chapter 2, "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 Section 2.4, "What's Next?".

1.3 Concepts

This section introduces the concepts involved in building portals to give you a general overview before you begin to build a portal with Portal Builder. These basic concepts are explored in depth in the chapters of this guide:

- Section 1.3.1, "What Is a Portal?"
- Section 1.3.2, "What Is the Home Portal?"
- Section 1.3.3, "What Is Portal Builder?"
- Section 1.3.4, "What Is a Portal Template?"
- Section 1.3.5, "What Is the Portal Server?"
- Section 1.3.6, "What Is a Subportal?"
- Section 1.3.7, "What Are Pages?"
- Section 1.3.8, "What Are Portal Components?"
- Section 1.3.9, "What Are Portal Assets?"
- Section 1.3.10, "What Are Portal Tools and Services?"

1.3.1 What Is a Portal?

A portal is an online gateway to a wide variety of purposes. 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 members. For example:

- Intranet portals used for collaboration, employee self-service, and company communication, such as:
  - Company-wide portal: Data is a mixture of public, private, and secure.
  - Department portal: Data is viewable within a specified team and editable or publishable by only a few managers.
  - Private portal: Data is highly sensitive, for example for mergers and acquisitions. Extra care related to who can download, print, or view is important.
  - HR portals: Display highly secure information based on login.

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

- Team collaboration portals that allow users to share documents and content, track activity, and engage in discussions.
For more about portal use cases, see the "What Is a Portal" section in Planning a Portal with WebCenter Portal.

WebCenter Portal provides all the tools you need to quickly create a robust portal through an intuitive user interface and out-of-the-box portal templates (see Section 1.3.4, "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 be a viewer, a participant, or a moderator of a portal with defined permissions, or may be granted ad hoc permissions to certain areas of the portal, such as editing permissions on a particular page in the portal.

### 1.3.2 What Is the Home Portal?

The Home portal is the area where users have access to their profile, available ports, 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 the "Exploring WebCenter Portal" chapter in Using Oracle WebCenter Portal.

### 1.3.3 What Is Portal Builder?

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

All aspects of using Portal Builder 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 Builder to apply settings to all portals, see the chapters in “Managing Portals in Portal Builder Administration” in Administering Oracle WebCenter Portal.

### 1.3.4 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. A portal template can be one of the out-of-the-box templates 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 Chapter 3, "Working with Portal Templates."

### 1.3.5 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 Chapter 4, "Publishing a Portal."

1.3.6 What Is a Subportal?

Any portal can be a parent to one or more child portals, or subportals. The use of subportals to create a portal hierarchy is optional, and dependent on the design you wish to achieve for your end users.

For more information, see Chapter 5, "Working with Subportals."

1.3.7 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 Documents page. System pages are prepopulated with relevant input fields and boilerplate text. System pages are customizable at the portal level and at the application level. For more information, see:
  - Portal-level system pages: Chapter 8, "Customizing System Pages for a Portal"

- **Business role pages**, 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 the "Managing Business Role Pages" chapter 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 pages**, created by the system administrator to add to those provided out-of-the-box. For information about creating new business role pages, see the "Managing Business Role Pages" chapter 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 the "Creating and Managing Personal Pages" chapter in Using 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 the "Managing Personal Pages" chapter 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 moderator, 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 moderator 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 moderator (see Section 7.3.2, "Changing the Page Template for a Portal"). When you create a portal page, you choose a page style for the initial content and layout of the page. Page templates and page styles are portal assets (see Section 1.3.9, "What Are Portal Assets?").

Users can customize a page for their own personal view by rearranging items, expanding or collapsing task flows, and resizing areas, visible only to the user.

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 Part III, "Working with Portal Pages."

1.3.8 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:
- Chapter 14, "Working with Resource Catalog Components on a Page"
- Chapter 15, "Working with Web Development Components on a Page"
- Chapter 16, "Working with Layout Components on a Page"

1.3.9 What Are Portal Assets?

Assets are the objects that define the structure, look and feel, and the content of portals. WebCenter Portal provides the following assets, which can be used out-of-the-box or customized: page templates, navigation models, resource catalogs, skins, page styles, Content Presenter display templates, task flow styles, pagelets, task flows, and data controls.

A portal moderator 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 Chapter 20, "Creating, Editing, and Managing Portal Assets." For information specific to shared assets, see Chapter 59, "Working with Shared Assets."

1.3.10 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: announcements, discussions, documents, portal events, lists, search, tags, instant messaging and presence, links, mail, polls, activity graph, notes, and notifications.

For more information, see Chapter 39, "Introduction to Portal Tools and Services."

1.4 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:

- Section 1.4.1, "Creating and Publishing a New Portal"
- Section 1.4.2, "Editing, Administering, and Customizing a Portal"
- Section 1.4.3, "Creating, Editing, and Managing Portal Pages"
- Section 1.4.4, "Creating, Editing, and Managing Portal Assets"
- Section 1.4.5, "Managing Portal Security and Membership"
- Section 1.4.6, "Adding and Managing Portal Content"
- Section 1.4.7, "Adding and Managing Portal Tools and Services"
- Section 1.4.8, "Managing Portal Templates and Shared Assets for All Portals"
- Section 1.4.9, "Changing the Look and Language in a Portal"

1.4.1 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. If the portal design supports subportals, you can add subportals to an existing portal.

For more information, see Part I, "Getting Started."

1.4.2 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, customizing system pages used by the portal, managing device groups to display the portal on various devices, and customizing task flows for the portal.

For more information, see Part II, "Working with a Portal."

1.4.3 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 Part III, "Working with Portal Pages."

1.4.4 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 Part IV, "Working with Portal Assets."
1.4.5 Managing Portal Security and Membership

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

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

1.4.6 Adding and Managing Portal Content

Working with content in a portal includes using Content Presenter, adding the task flows and components provided by the Documents tool to a page, establishing workflow on documents, and adding wikis and blog to a portal.

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

1.4.7 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 Part VII, "Working with Portal Tools and Services."

1.4.8 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 Part VIII, "Managing Shared Resources for All Portals."

1.4.9 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 Part IX, "Enhancing Portals Through Design and Language."
Creating and Building a New Portal

This chapter describes how to create a new portal, optionally creating portal pages to immediately populate the new portal.

This chapter includes the following topics:

- Section 2.1, "About Creating a New Portal"
- Section 2.2, "Creating a New Portal"
- Section 2.3, "Creating Pages When Creating a New Portal"
- Section 2.4, "What’s Next?"

Permissions: To perform the tasks in this chapter, you need the application-level permission Create Portals. This permission is granted to all authenticated users by default. As a portal creator, you are given Moderator role in the portal. You can create pages in a portal if you are the portal moderator or member with Basic Services: Edit Page Access, Structure and Content permission in the portal.

For more information about permissions, see Section 29.1, "About Roles and Permissions for a Portal."

2.1 About Creating a New Portal

Before you begin to create a new portal, review Planning a Portal with WebCenter Portal and Section 1.3.1, "What Is a Portal?"

WebCenter Portal provides portal templates for creating portals that support different types of endeavors. You can select a portal template when you create a new portal that provides a starting point for your portal, with built-in functionality appropriate for the portal you want to create. You can use an out-of-the-box portal template, or create your own custom portal templates using an existing portal as the basis for the template. For information about portal templates, see Chapter 3, "Working with Portal Templates" and Chapter 58, "Managing All Portal Templates." After creation, portals can be completely customized, including the navigation controls, the color scheme, and the look and feel of any task flow or portlet, all from within the browser.

When you create a portal, you become the default portal moderator, which means that you are assigned the Moderator role. In this role, you have 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 moderator can assign portal members to these roles and modify the default permissions as required, or create new custom roles. For more information, see
Section 7.7, "Administering Security in a Portal."

---

**Note:** As a portal creator, you will always have Manage Security and Configuration permission in the portal. You retain this permission even if your default Moderator role is changed to one with fewer permissions (for example, Participant or Viewer role), or 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. For more information, see Section 39.1, "About Tools and Services."

Any portal can be parent to one or more subportals. This allows you to develop a portal hierarchy. For more information, see Chapter 5, "Working with Subportals."

### 2.2 Creating a New Portal

**WARNINGS:**

- 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 will not 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 any of the following ways:
   - From the Portals menu, select Create a Portal (Figure 2–1).
Creating and Building a New Portal

Figure 2–1  Portals Menu

- From the Portals menu, select Portal Builder to display the Portals page in Portal Builder. In the left pane, click Create Portal (Figure 2–2).

Figure 2–2  Portals Page in Portal Builder

- From the Portals menu, select Browse Portals to display the Portals page in the Home portal. In the toolbar, click Create (Figure 2–3).
Creating a New Portal

Figure 2–3  Portals Page (Portal Browser) in Home Portal

The portal template selection screen displays (Figure 2–4).

2. Select a Portal Template. Explore the portal templates available to you to use as the basis for your new portal, then click Use This beneath the template you want to use to display the portal specification screen (Figure 2–5).
3. **Title and Description.** Modify the default portal title if desired and, optionally, enter a description and keywords for the portal. Enter any keywords related to the content of the portal to make it more easily discoverable in search results. Separate keywords with a space or comma.

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
Creating a New Portal

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).

4. **Attributes.** If shown, enter values for the custom attributes for the portal.

**Note:** The Attributes section displays only if the selected portal template has custom attributes defined. Figure 2–5 shows the screen when the portal template has custom attributes defined.

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

6. **Access.** 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 permissions to view pages, lists, events, links, notes, announcements, discussions, and documents. 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 on the Portals page and will appear in search results.

- **Hidden:** To access the portal, membership is required (through invitation). The portal will not be shown in the list of available portals on the Portals page and will not appear in search results.

**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 have permissions to access pages and services in the portal.

7. To create pages for your new portal during portal creation, the wizard provides a shortcut to creating multiple pages and subpages that are immediately available in your portal upon creation. See Section 2.3, "Creating Pages When Creating a New Portal."

8. Click **Create.**
WebCenter Portal reports progress while creating the portal, and notifies you when your portal has been created, providing choices for your next step (Figure 2–6).

**Figure 2–6 Portal Created**

![Create Portal](image)

Your portal has been created.

**Grizzlies Lacrosse**

Portal URL: http://myserver:8888/webcenter/portal/GrizzliesLacrosse

What do you want to do next?

- View your portal
- Edit your portal
- Administer your portal
- Upload Documents
- Browse all portals
- Create another portal

9. Click one of the selections under **What do you want to do next?**

- **View your portal** to display the Home page of the new portal, including immediate navigation to pages you created, as shown in the example in Figure 2–7.

**Figure 2–7 View Portal**

![View Portal](image)

- **Edit your portal** to open the portal in the portal editor (Figure 2–8). For information about portal editing tasks, see Chapter 6, "Editing a Portal."
Creating a New Portal

**Figure 2–8  Edit Portal**

■ **Administer your portal** to open the administration settings for the portal (Figure 2–9). For information about portal administration tasks, such as adding members to the portal, see Chapter 7, "Administering a Portal."

**Figure 2–9  Administer Portal**

■ (When the Documents tool is enabled in the selected portal template) **Upload Documents** to display the Documents page, where you can manage and add documents in the portal. For more information, see the "Creating and
Managing Documents’ chapter (specifically, the section "Uploading Files") in Using Oracle WebCenter Portal.

Figure 2–10  Documents Page

- Browse all portals to open the Portals page (portal browser) in the Home portal (Figure 2–11).

Figure 2–11  Portal Browser

- Create another portal to create another new portal.

As the portal creator, you are automatically granted the Moderator role for this portal, and can begin to populate, customize, and manage the portal as described in the chapters of this guide.

Any portal can be parent to one or more subportals. This allows you to develop a portal hierarchy. For more information, see Chapter 5, "Working with Subportals."

2.3 Creating Pages When Creating a New Portal

You can create pages for a new portal in-place while creating the portal, using special syntax in the portal creation wizard. To create pages for an existing portal, see Section 12.2, "Creating Pages or Subpages in a Portal."

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. If the portal template selected for the portal includes a page style called Default Page Style, then that is the page style used for all pages created in this way. Otherwise, the out-of-the-box Blank page style is applied to the pages (see Table 25–1, ” Out-of-the-Box Page Styles”). It is not possible to change a page style for a page after creating the page.

To create pages when creating a new portal:
1. In the portal creation wizard, click **Add Pages** (Figure 2–12).

**Figure 2–12  Creating Pages in Create Portal Wizard**

![Creating Pages in Create Portal Wizard](image-url)

- **URL**
  - This portal can be accessed through the following URL.
  - `http://myserver.com:8090/webcenter/portal/GrizzliesLaurence`

- **Access**
  - **Public**
    - Anyone can visit this portal.
  - **Private**
    - People must be invited to join this portal. The portal will appear in search results and in the list of available portals.
  - **Hidden**
    - People must be invited to join this portal. The portal will not appear in search results or in the list of available portals.

2. To create a set of top-level pages for the portal, type the page names separated by commas (as shown in Figure 2–13) or type the name of each page on its own line.

**Note:** By default, all new portals have a Home page. The portal template you select may also include additional out-of-the-box system pages, which you will see listed under **Existing Pages**. For a list of all out-of-the-box system pages, see Section 7.10.2, "Working with System Pages in Portal Administration."

**Figure 2–13  Creating Pages in Create Portal Wizard: Basic Syntax**

![Creating Pages in Create Portal Wizard: Basic Syntax](image-url)

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 2–14).

**Figure 2–14 Creating Pages in Create Portal Wizard: Advanced Syntax**

This example creates the new portal prepopulated with a page navigation as shown in Figure 2–15.

**Figure 2–15 Page Navigation in New Portal**

4. To revise or confirm any information entered for the portal definition, click Portal Information to return to the prior page. From there, you can click Add Pages again without losing your page specification syntax.

2.4 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? Table 2–1 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

<table>
<thead>
<tr>
<th>If I want to ....</th>
<th>What do I need to understand and do?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adding Content</td>
<td>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. For information about creating a new page, and choosing a page style that exposes the page the way you want your portal users to see it, see Section 12.2.2, &quot;Creating a Page or Subpage in an Existing Portal.&quot; For information about editing a page and adding content to it, see Section 12.4, &quot;Editing a Page.&quot; For information about some of the components you can add to a page, see Section 23.1.1, &quot;Built-in Resource Catalogs.&quot;</td>
</tr>
<tr>
<td>Populate my portal with content (and understand what kinds of things I can add to my portal)</td>
<td></td>
</tr>
<tr>
<td>Editing the Layout and Structure of a Page</td>
<td>Change the background color or image on a page</td>
</tr>
<tr>
<td>Change the layout of a page</td>
<td>See Section 12.4.5, &quot;Adding New Content Regions.&quot;</td>
</tr>
<tr>
<td>Create tabs within a page</td>
<td>See Section 12.4.6, &quot;Creating Layered Content Regions Using Tabs.&quot;</td>
</tr>
<tr>
<td>Allow other users to edit a page in my portal and add content, such as links and text</td>
<td>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 Section 29.3, &quot;Viewing and Editing Permissions of a Portal Role&quot; (you probably want to select the permission Edit Page Access, Structure, and Content). To set permissions on a single page in a portal, see Section 13.15, &quot;Setting Page Security.&quot; To limit editing access to just one component on a page, you can associate a security-related EL expression with the component instance. See &quot;Section 13.15.1, &quot;Setting Security on a Page Component.&quot;</td>
</tr>
<tr>
<td>Change the background color or image on a page</td>
<td></td>
</tr>
<tr>
<td>Change the layout of a page</td>
<td></td>
</tr>
<tr>
<td>Create tabs within a page</td>
<td></td>
</tr>
</tbody>
</table>
### Table 2–1  (Cont.) Building Out a Portal

<table>
<thead>
<tr>
<th>If I want to ....</th>
<th>What do I need to understand and do?</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Modifying Navigation</strong></td>
<td>You can create a two-level hierarchy in your portal navigation in either of the following ways:</td>
</tr>
</tbody>
</table>
| In my portal navigation, create a nested hierarchy                             | ■ Create subpages, which by default automatically adds them to the portal hierarchy beneath their parent page. See Section 12.2.2, "Creating a Page or Subpage in an Existing Portal."  
■ Adjust the portal navigation manually by moving the pages as desired. See Section 13.3, "Adjusting Page Order and Hierarchy in the Portal 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 created (see Section 12.2.2, "Creating a Page or Subpage in an Existing Portal"). **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 Section 1.3.7, "What Are Pages?"  
If a portal 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 Section 13.9, "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 or portal administration, click the **Add** icon, and select **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, Section 13.2, "Adding an Existing Page to the Portal Navigation." |
### What's Next?

**Table 2–1 (Cont.) Building Out a Portal**

<table>
<thead>
<tr>
<th>If I want to ....</th>
<th>What do I need to understand and do?</th>
</tr>
</thead>
</table>
| 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 or portal administration, click the **Add** icon, and select **Link**.  
- Set the Path property to the URL of the target 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: |
| | **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. When you click the navigation item, the page displays without its enclosing portal, as shown here: |
| | **Note**: If you create a Content Item link to a document/wiki, the target will not expose editing controls. |

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

<table>
<thead>
<tr>
<th>If I want to ....</th>
<th>What do I need to understand and do?</th>
</tr>
</thead>
<tbody>
<tr>
<td>See Section 22.3.3, “Adding Items to a Navigation Model.”</td>
<td><strong>Note</strong>: If you create a Content Item link to a document/wiki, the target will not expose editing controls.</td>
</tr>
</tbody>
</table>

In my portal navigation, add non-page navigation items, such as content item, content query, navigation reference, folder, separator, and so on.

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

<table>
<thead>
<tr>
<th>If I want to ....</th>
<th>What do I need to understand and do?</th>
</tr>
</thead>
<tbody>
<tr>
<td>In my portal navigation, create a menu or label, which can be expanded to reveal associated target locations.</td>
<td>In the portal editor or portal administration, click the <strong>Add</strong> icon, and select <strong>Folder</strong>. Name the folder, then add beneath it navigation items such as page links, links, or a navigation model that you defined (see Section 22.2, &quot;Creating a Navigation Model&quot;). You can also drag and drop existing navigation items under the folder.</td>
</tr>
<tr>
<td><img src="image1.png" alt="Menu Image" /></td>
<td>The menu is added to your portal navigation: <img src="image2.png" alt="Portal Image" /></td>
</tr>
<tr>
<td><img src="image3.png" alt="Example" /></td>
<td>See also, Section 22.3.3, &quot;Adding Items to a Navigation Model.&quot;</td>
</tr>
</tbody>
</table>
| In my portal navigation, delete a page (without deleting the page itself) | To hide a page in the navigation, see Section 13.9, "Showing or Hiding a Page in the Portal Navigation."  
**Note:** To delete a page, see "Section 13.5, "Deleting a Page." |
| 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 "Section 7.3.2, "Changing the Page Template for a Portal."  
See also, Section 21.1.1, "About Built-in Page Templates." |
### Table 2–1 (Cont.) Building Out a Portal

<table>
<thead>
<tr>
<th>If I want to ….</th>
<th>What do I need to understand and do?</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Working with Wikis and Other Documents</strong></td>
<td><strong>Add a new wiki page to my portal (make the entire page a wiki)</strong></td>
</tr>
<tr>
<td></td>
<td>Either:</td>
</tr>
<tr>
<td></td>
<td>■ Create a new wiki page using the Wiki page style. See Section 12.2.2, &quot;Creating a Page or Subpage in an Existing Portal.&quot;</td>
</tr>
<tr>
<td></td>
<td>■ Or, create a wiki document, then add it to a page in a number of ways. See the &quot;Creating a Wiki Document Using the New Wiki Document Action&quot; section in Using Oracle WebCenter Portal and the next row in this table.</td>
</tr>
<tr>
<td></td>
<td><strong>Tip:</strong> To work with wikis, make sure that the Documents tool is enabled. See Section 39.2, &quot;Enabling and Disabling Tools and Services Available to a Portal.&quot;</td>
</tr>
<tr>
<td></td>
<td>See also, Chapter 37, &quot;Adding a Wiki to a Portal.&quot;</td>
</tr>
<tr>
<td></td>
<td><strong>Display an existing document/wiki on a page in my portal</strong></td>
</tr>
<tr>
<td></td>
<td>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. Use the resource catalog to add the document to the page:</td>
</tr>
<tr>
<td></td>
<td>■ To display an existing document that is already in your portal, open Content Management, then Portal Documents, select the document, and click Add.</td>
</tr>
<tr>
<td></td>
<td>■ To display an existing document that is available in the connected content repository, open Content Management, then All Content. Search for and select the document, and click Add.</td>
</tr>
<tr>
<td></td>
<td>You can expose the document in a number of ways: as a link, image, preview, editable view (Document Viewer), or non-editable view (Content Presenter). See Section 34.3, &quot;Adding a Selected Folder or File to a Page&quot; and the next two rows in this table.</td>
</tr>
<tr>
<td>Table 2–1  (Cont.) Building Out a Portal</td>
<td>If I want to ....</td>
</tr>
<tr>
<td>----------------------------------------</td>
<td>------------------</td>
</tr>
</tbody>
</table>
| Add an existing document/wiki to a page in my portal, including editing controls | To allow users to edit the document, add the document in a Document Viewer task flow. See Section 34.3, "Adding a Selected Folder or File to a Page."
| ![Document Viewer](image1.png) | You can customize the editing controls that are exposed using the Features Off property of the Document Viewer task flow. See Table 35–7, "Document Viewer Task Flow Parameters". |
| Add an existing document/wiki to a page in my portal, without editing controls | To hide document editing controls from users, add the document in a Content Presenter task flow. See Section 34.3, "Adding a Selected Folder or File to a Page." |
| ![Content Presenter](image2.png) | 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 Section 22.3.3, "Adding Items to a Navigation Model." |
| 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 (Composer), click the ![wrench](image3.png) (wrench) icon for the Document Viewer or Content Presenter task flow to open the Component Properties 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 | See Section 30.3, "Setting Up Membership Options for a Portal."
For more information about portal roles and members, see Chapter 30, "Managing Members and Assigning Roles in a Portal."
| Invite users to my portal, giving them the option to become members | See Section 30.3, "Setting Up Membership Options for a Portal."
For more information about portal roles and members, see Chapter 30, "Managing Members and Assigning Roles in a Portal."
| Broadcast messages to all portal members | Add an Announcements task flow to a page or add the Announcements page in the portal navigation (Page Link). For more information, see Chapter 43, "Adding Announcements to a Portal."
Tip: To work with announcements, make sure that the Announcements tool is enabled. See Section 39.2, "Enabling and Disabling Tools and Services Available to a Portal." |
<table>
<thead>
<tr>
<th>If I want to ....</th>
<th>What do I need to understand and do?</th>
</tr>
</thead>
</table>
| Provide a discussion forum for portal members to pose questions and discuss answers | Add a Discussions task flow to a page or add the Discussions page in the portal navigation (Page Link). For more information, see Chapter 46, "Adding Discussion Forums to a Portal."
By default, WebCenter Portal creates a single discussion forum for a new portal after discussions is enabled. You can optionally modify the default setting to allocate multiple discussion forums to the portal. See Section 46.3, "Modifying Discussion Forum Settings for a Portal."
**Tip:** To work with discussions, make sure that the Discussions tool is enabled. See Section 39.2, "Enabling and Disabling Tools and Services Available to a Portal."
| Display an events calendar | To view portal events on the Events page or task flow, see Section 44.5, "Showing Events on the Events Page in a Portal."
To view portal events from other portals, see Section 44.6, "Displaying Multiple Calendars in an Events Task Flow."
If you use Microsoft Exchange 2003 or 2007, 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, see Section 44.4, "Showing Events on a Page in the Home Portal."
**Tip:** To work with events and calendar, make sure that the Events tool is enabled. See Section 39.2, "Enabling and Disabling Tools and Services Available to a Portal."
| Display my personal Outlook calendar | |
| View the activities of members | To add an activity stream or recent activities to a portal, see Chapter 41, "Adding Activities to a Portal."
| Provide surveys for portal members to take | To create, manage, and analyze polls, see Chapter 52, "Adding Polls to a Portal."
| 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 Chapter 54, "Adding RSS Feeds to a Portal."
**Tip:** To enable RSS, see Section 7.2.7, "Enabling or Disabling RSS News Feeds for a Portal."
This chapter introduces the out-of-the-box portal templates provided with WebCenter Portal, and describes how to work with portal templates and create new custom portal templates.

This chapter includes the following topics:

- Section 3.1, "About Portal Templates"
- Section 3.2, "Viewing Available Portal Templates"
- Section 3.3, "Creating a New Portal Template"
- Section 3.4, "Viewing Information About a Portal Template"
- Section 3.5, "Searching for a Portal Template"
- Section 3.6, "Renaming a Portal Template"
- Section 3.7, "Setting Up Access to a Portal Template"
- Section 3.8, "Publishing or Hiding a Portal Template"
- Section 3.9, "Deleting a Portal Template"

Permissions: To perform the tasks in this chapter, you need the application-level permission Create Portal Templates. This permission is granted to all authenticated users by default. Users with this permission can create a new portal template, rename, hide, or delete a portal template that they own. To publish a portal template for others to use, you additionally need the application-levelPortal Templates: Manage All permission.

To view and manage all portal templates, including private portal templates created by other users, and import or export portal templates, you need the Application Specialist role (or the application-levelPortal Templates: Manage All permission). See Chapter 58, "Managing All Portal Templates."

For more information about permissions, see Section 29.1, "About Roles and Permissions for a Portal."

3.1 About Portal Templates

When you create a portal, you can base it on one of the out-of-the-box portal templates, 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 creating a portal that is configured as required for your specific needs.
A portal template may include custom attributes that can be set as needed during the creation of a new portal based on the template. 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 portal template if you wish to use it as the basis for new portals.

To learn more about portal templates, refer to the following sections:

- Section 3.1.1, "About Out-of-the-Box Portal Templates and Categories"
- Section 3.1.2, "About Custom Portal Templates"

### 3.1.1 About Out-of-the-Box Portal Templates and Categories

WebCenter Portal provides several portal templates out-of-the-box from which you can choose when creating a new portal. These templates are named and grouped into categories according to their general purpose, and can be used as is for a new portal or as a starting point for developing your own custom templates.

Table 3–1 lists and describes the out-of-the-box portal templates and categories, which you will see for selection when you create a new portal (Section 2.2, "Creating a New Portal").

<table>
<thead>
<tr>
<th>Categories</th>
<th>Portal Templates</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>PORTALS</td>
<td>Portal</td>
<td>Generic template for building a custom portal, designed to accommodate the latest features of WebCenter Portal in your new portal.</td>
</tr>
<tr>
<td>TEAM COLLABORATION</td>
<td>Blogger</td>
<td>Designed for a portal where members can publish their opinions through blogs, and preconfigures announcements, discussions, documents, events, lists, and mail.</td>
</tr>
<tr>
<td></td>
<td>Discussion Site</td>
<td>Designed for a portal where members can exchange ideas in discussion forums to quickly resolve issues, come up with new product ideas, resolve customer escalations, determine new service offerings, and more.</td>
</tr>
<tr>
<td></td>
<td>Document Exchange</td>
<td>Designed for a portal centered around sharing and organizing documents to enable teams to quickly facilitate agreement on wording and messaging. This template also enables checkin and workflow around document approvals and working in teams.</td>
</tr>
</tbody>
</table>
3.1.2 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 the "Developing Components for WebCenter Portal Using JDeveloper" chapter in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

### 3.2 Viewing Available Portal Templates

To view the portal templates available to you:

- In the Home portal, click the **Portal Templates** tab to view the **Portal Templates** page (Figure 3–1).

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](image-url)
3.3 Creating a New Portal Template

You cannot modify the out-of-the-box portal templates described in Section 3.1, "About Portal Templates", but any user with the portal-level Portal Templates-Create permission can create a new portal template.

To create a new portal template, you start by creating a portal based on an existing template (see Chapter 2, "Creating and Building a New Portal"), 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 copy the discussions, documents, lists, member information (including roles), or pages from the source portal. The security settings for the portal are also copied by the template.

---

**Note:** When creating a new portal template, the template does not copy announcements data from the source portal.

---

As a portal template creator, you can publish your portal template for others to use; otherwise, it remains private and hidden from others. To make the template public, you must be granted the application-level Portal Templates-Manage All permission.

---

**Note:** Application specialists can also create portal templates to be made available at the application level, and import and export custom portal templates, including seeded data. For more information, see Chapter 58, "Managing All Portal Templates."

---

To create a portal template:

1. In the Home portal, go to the Portal Templates page (see Section 3.2, "Viewing Available Portal Templates").

2. Click Create to open the Create dialog (Figure 3–2).

---

**Note:** If you have not created any portals, and do not have permissions to manage a portal, the Create link is not available.
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 described in Section 3.6, "Renaming a Portal Template."

Portal template names can contain alphanumeric characters, underscores, spaces, multibyte characters, and special characters such as & and #. The maximum allowable length is 200 characters. The following reserved keywords are not allowed as the full 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. In the portal creation wizard, the portal template is listed under the selected category heading, or under **More...** if you do not select a category. Click **Next**.

5. In the **Portals** step (Figure 3–3), select a portal from the list (which displays portals that you created or have permissions to manage) to use as the basis for the new portal template. Click **Next**.
6. In the **Content** step, select the services that contain data that you want the portal template to copy from the source portal (Figure 3–4).

---

**Note:**

- Portal templates cannot copy announcements data from a portal.
- List definitions are always copied; checking **Lists** in this step specifies that you want to copy the list data, too.
- If Advanced Permissions has been specified in the portal on which the template is based and you select **Members 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 has been specified for roles or individual users in the portal that is used to create a new portal template and you select **Members Info** when creating the 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).
- A new portal template automatically copies all assets from the source portal. For a full list of all portal assets, see Section 20.1, "About Assets." You can edit a portal that is based on the portal template to remove individual assets that you do not want to include in the portal, and (optionally) create another portal template from the edited portal.
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. By default, the template is private, which means that other users will not see it on their personal Portal Templates page in the Home portal. However, users granted the Portal Templates-Manage All permission can view and manage private templates on the application-level Portal Templates page. For more information, see Chapter 58, “Managing All Portal Templates.”

8. To publish your portal template to make it available to all WebCenter Portal users, you must be granted the application level Portal Templates-Manage All permission. If you have this permission, 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.

3.4 Viewing Information About a Portal Template

To view information about a portal template:

1. In the Home portal, go to the Portal Templates page (see Section 3.2, "Viewing Available Portal Templates").
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 3–6).

3. Explore the information in the About Portal Template dialog:
   - **Name**: Internal name of the portal template displayed in the URL to the portal template. 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 portal creation wizard 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 Section 3.6, "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 Section 3.6, "Renaming a Portal Template."

- **Created By:** User name of the portal template creator.
- **Date Created:** Date and time that the portal template was created.
- **Direct URL:** URL that provides direct access to the portal template.

### 3.5 Searching for a Portal Template

Global search does not search portal assets, such as portal templates, page templates, resource catalogs, navigation models, 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.

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

1. In the Home portal, go to the **Portal Templates** page (see Section 3.2, "Viewing Available Portal Templates").
2. In the **Filter** field, enter a search string.
3. Click the **Filter** icon (Figure 3–7).

**Figure 3–7 Filter Icon**

![Filter Icon](image1)

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

4. To clear the current search string and display all portal templates, click the **Clear Filter** icon (Figure 3–8).

**Figure 3–8 Clear Filter Icon**

![Clear Filter Icon](image2)

### 3.6 Renaming a Portal Template

To rename a portal template that you created or have permissions to manage:

1. In the Home portal, go to the **Portal Templates** page (see Section 3.2, "Viewing Available Portal Templates") and select the portal template.
2. From the **Actions** menu, select **Rename Portal Template** to open the Rename Portal Template dialog.
3. In the **Display Name** field, enter a new name for the portal template. Optionally, enter a **Description**.
4. Click **OK**.

### 3.7 Setting Up Access to a Portal Template

You can grant specific users and groups view-only or manage access to a portal template that you created or have permissions to manage.
To set up access to a portal template that you created or have permissions to manage:

1. In the Home portal, go to the **Portal Templates** page (see Section 3.2, "Viewing Available Portal Templates") and select the portal template.

2. From the **Actions** menu, select **Set Template Access**.

   The Set Template Access dialog opens (Figure 3–9).

   **Figure 3–9  Set Template Access Dialog**

3. In the Set Template Access dialog:
   - Click **Add Users** to open the Search Users dialog where you can select from a list of users or search for a user name.
   - Click **Add Groups** to open the Search Groups dialog where you can search for a user group.

   For tips on searching for a user or group in the identity store, see Section 30.5.1, "Searching for a User or Group in the Identity Store."

4. For each user or user group listed in the Set Template Access dialog, specify which level of access to grant (one permission per user or user group):
   - Select the **View** check box to grant view-only access to the portal template, allowing them to perform the following tasks on the portal template:
     - Section 3.4, "Viewing Information About a Portal Template"
     - Section 3.5, "Searching for a Portal Template"
   - Select the **Manage** check box to grant full access to the portal template, allowing them to additionally perform the following tasks on the portal template:
     - Section 3.6, "Renaming a Portal Template"
     - Section 3.7, "Setting Up Access to a Portal Template"
Publishing or Hiding a Portal Template

3.8 Publishing or Hiding a Portal Template

Permissions: To publish a portal template, you need the application-level Portal Templates: Manage All permission. Users with the Portal Templates: Create permission can create, rename, hide, or delete a portal template, but cannot publish a template without the Portal Templates: Manage All permission. This permission is granted to the Application Specialist role by default.

For more information about permissions, see Section 29.1, "About Roles and Permissions for a Portal."

When you create a portal template (see Section 3.3, "Creating a New 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. Other users will not see the private template on their personal Portal Templates page in the Home portal. However, the application specialist (or users with application-level Portal Templates-Manage All permission) can view and manage all private templates on the application-level Portal Templates page. For more information, see Chapter 58, "Managing All Portal Templates."

To publish or hide a portal template that you create, when you have the application-level Portal Templates-Manage All permission:

1. In the Home portal, go to the Portal Templates page (see Section 3.2, "Viewing Available Portal Templates") and select the portal template.

2. From the Actions menu, select either of the following:

   - Make Public to publish the template to all WebCenter Portal users.
   - Remove Public Access to remove the template(s) from the portal template lists in the Home portal for all users, except yourself (as the template creator) and those users to whom you have specifically granted View or Manage access in the Set Template Access dialog (see Section 3.7, "Setting Up Access to a Portal Template").

   Note: If another user is in the process of creating a new portal (see Section 2.2, "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.

3. In the confirmation prompt, confirm your selection.
3.9 Deleting a Portal Template

**Note:** Out-of-the-box portal templates cannot be deleted. However, application specialist (or users with Portal Templates-Manage All permission) can hide the out-of-the-box templates from everyone’s view using the application-level Portal Templates page, as described in Section 58.9, “Publishing and Hiding Portal Templates.”

Deleting a portal template does not affect the portals that were created using the portal template.

To delete one or more portal templates that you created or have permissions to manage:

1. In the Home portal, go to the Portal Templates page (see Section 3.2, "Viewing Available Portal Templates") and select the portal template(s).
2. In the confirmation prompt, click **Delete**.
This chapter describes the various ways in which you can make a portal available for others to use.

This chapter includes the following topics:

- Section 4.1, "About Publishing a Portal"
- Section 4.2, "Publishing the Link to a Portal"
- Section 4.3, "Making a Portal Known (Discoverable)"
- Section 4.4, "Granting Users Access to a Portal"
- Section 4.5, "Granting Public Access to a Portal"

**Permissions:** To perform the tasks in this chapter, you need the Manage Security and Configuration or Manage Configuration permission in the portal. A portal moderator has this permission by default.

Any user who accesses administration settings for a portal and does not have Manage permission (for example, a user with Participant role, granted permission to edit a page in the portal) will see only the settings available to their role and permissions.

For more information about permissions, see Section 29.1, "About Roles and Permissions for a Portal."

### 4.1 About Publishing a Portal

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

### 4.2 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 the "Publishing the Link to a Portal" section in *Using Oracle WebCenter Portal.*
4.3 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 Section 2.2, "Creating a New Portal."
   - If the portal is currently Hidden, change the access to Public or Private, as described in Section 7.7.2, "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 Section 30.3.1, "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 Chapter 30, "Managing Members and Assigning Roles in a Portal."

4.4 Granting Users Access to a Portal

After making the portal discoverable (see Section 4.3, "Making a Portal Known (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 Section 29.3, "Viewing and Editing Permissions of a Portal Role."
- To grant access to a limited number of individual pages in the portal, see Section 13.15, "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 Section 30.5, "Adding Members to a Portal."

4.5 Granting Public Access to a Portal

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

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

- Directly, using the portal URL provided to them.
- From the WebCenter Portal Welcome page, if their installation is configured to display this page (Figure 4–1).

**Figure 4–1 Public Portals Link on Welcome Page**

Public users are assigned the Public-User role, which has no access to portal information by default. To grant public access to a portal, including its pages and 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 Chapter 2, "Creating and Building a New Portal"
   - If the portal is currently Hidden or Private, change the access to Public, as described in Section 7.7.2, "Changing the Access to a Portal."

   When a portal is made public, the Public-User role is automatically granted View Pages and Content permission in the portal, which allows public users to view pages, lists, events, links, notes. This permission does not grant authorization to view announcements, discussions, or documents (files, folders, wikis, and blogs), which require explicit View Announcements, View Discussions, and View Document permissions (see Section 29.1.2, "Understanding Permissions and Permission Models in a Portal"). You can grant additional permissions to the Public-User role later (see step 4).

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 Section 7.2.1, "Accessing the Overview 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 Section 30.3.1, "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 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 announcements, discussions, and documents (files, folders, wikis, and blogs).

On the Roles page in the portal administration (see Section 7.7.3, "Managing Roles and Permissions in a Portal"), select Public-User, then click Edit Permissions (Figure 4–2).

![Figure 4–2  Granting Public User Access to Portal](image)

<table>
<thead>
<tr>
<th>Role</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Moderator</td>
<td>Users with permissions to manage this portal</td>
</tr>
<tr>
<td>Participant</td>
<td>Users with permissions to contribute to this portal</td>
</tr>
<tr>
<td>Public-User</td>
<td>Permissions for anonymous or &quot;guest&quot; users (not logged into WebCenter Portal)</td>
</tr>
<tr>
<td>Authenticated-User</td>
<td>Permissions for authenticated users (logged into WebCenter Portal)</td>
</tr>
<tr>
<td>Viewer</td>
<td>Users with permissions to view this portal</td>
</tr>
</tbody>
</table>

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, see Section 29.1, "About Roles and Permissions for a Portal."

The public permissions that you grant here override the public permissions set by the system administrator at the application level (as described in the "Granting Permissions to the Public-User" section in Administering Oracle WebCenter Portal).

6. Click Save.

7. If you want to restrict public access to certain pages in the portal, see Section 13.15, "Setting Page Security."
This chapter describes how to work with a portal hierarchy consisting of a parent portal and its subportals.

This chapter includes the following topics:

- Section 5.1, "About Portal Hierarchies"
- Section 5.2, "Viewing a Portal Hierarchy"
- Section 5.3, "Creating a Subportal"
- Section 5.4, "Creating a Custom Portal Hierarchy Navigation"
- Section 5.5, "Moving Subportals (Changing the Parent)"
- Section 5.6, "Managing a Subportal"

Permissions: To perform the tasks in this chapter, you need the application-level permission Ports: Create (to create a subportal), With Manage Security and Configuration or Manage Configuration permission in the subportal, you can manage and administer the subportal.

Any user who accesses administration settings for a subportal and does not have Manage permission (for example, a user with Participant role, granted permission to edit a page in the subportal) will see only the settings available to their role and permissions.

For more information about permissions, see Section 29.1, "About Roles and Permissions for a Portal."

5.1 About Portal Hierarchies

A portal hierarchy consists of a parent portal and one or more subportals. A subportal is simply a child portal created within an existing portal. A portal hierarchy provides several benefits:

- **Organization**: Portals with related content can be grouped together under a parent portal. For example, in a software development environment, subportals can be dedicated to primary features under the parent product portal. Or, each department can maintain a subportal under a company’s parent portal. Other hierarchical structures may be specific to your company, such as the unique requirements that are provided to your customers.

- **Navigation**: The hierarchical organization provides for logical navigation and drilling down into required areas for more information. For example, users can
navigate through a product hierarchy from product family to products to demos, or into different departments and functions in a company.

- **Delegated administration**: A subportal can be managed by a user who does not necessarily have access to the parent portal. In this way, an administrator can maintain control of a parent portal, and assign individual owners to any number of subportals, who in turn can delegate administration to others.

- **Inherited membership**: A subportal can optionally inherit the membership defined for the parent portal as a starting point. Subsequently, membership can be modified to suit the purposes of the subportal.

- **Security**: Content may be generally accessible, where a limited number of users have administrative permissions, or security may be identical to the parent portal, or completely overridden by the administrator of the subportal.

For information about creating a subportal, see Section 5.3, "Creating a Subportal."

### 5.1.1 Understanding Inheritance in Portal Hierarchies

A newly created subportal inherits the security (members, roles, and permissions) defined in the parent portal, and inherits tools and services from the parent portal. If a tool has been enabled in the portal template, it is enabled in the subportal. For more information, see:

- Section 5.1.1.1, "Inheriting Security"
- Section 5.1.1.2, "Inheriting Tools"

**Note**: Folders and files in the parent portal are not automatically available to the subportal. To add folders and files to the subportal, see Part VI, "Working with Content in a Portal."

#### 5.1.1.1 Inheriting Security

When you create a subportal, the initial security (members, roles, and permissions) is inherited from the parent portal.

To change the security settings of members, roles, and permissions in a subportal, see Section 5.6.1, "Modifying Inheritance Security Settings for a Subportal."

Any user roles that are defined in the portal template that is used to create the subportal are ignored.

#### 5.1.1.2 Inheriting Tools

When security is inherited from the parent portal (the default setting), a subportal inherits the tools that are enabled in the parent portal. These tools are available in the subportal but are not usable until you enable them (see Section 39.2, "Enabling and Disabling Tools and Services Available to a Portal"). However, if any of those tools are already enabled in the portal template used to create the subportal, they are immediately enabled in the subportal on creation.

If the portal template used to create the subportal has additional tools available and/or enabled that are not enabled in the parent portal, the additional tools will not be available in the subportal (see first row in Table 5–1). If the portal template has fewer tools enabled than the parent portal, the subportal inherits the enabled tools from the parent portal and the enabled state from the template (see second row in Table 5–1).
In summary: If you want a subportal to inherit all tools from the parent portal, make sure that you enable all the tools in the parent portal before creating the subportal. If you want some of those tools to be immediately enabled in the subportal on creation, make sure that they are enabled in the portal template on which the subportal is based.

**Note:** If a subportal inherits announcements or discussions, you need to perform an extra step in order to fully enable these services to inherit discussions server permissions applied to the parent portal. When you update permissions for discussions or announcements for a portal hierarchy, subportals do not automatically inherit the corresponding permission changes on the discussions server. To synchronize permissions and roles in subportals, your system administrator must run the WLST command `syncDiscussionServerPermissions`, as described in the "syncDiscussionServerPermissions" section in WebLogic Scripting Tool Command Reference.

### Table 5–1 Tools Inheritance in Subportals When Security Is Inherited: Examples

<table>
<thead>
<tr>
<th>Tools in Parent Portal</th>
<th>Tools in Portal Template Used to Create SubPortal</th>
<th>Tools in Resulting Subportal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Announcements Discussions Events</td>
<td>Enabled Disabled Disabled</td>
<td>Announcements</td>
</tr>
<tr>
<td>Announcements Discussions Events</td>
<td>Enabled Enabled Enabled</td>
<td></td>
</tr>
<tr>
<td>Announcements           Enabled</td>
<td>Announcements</td>
<td>Enabled Enabled</td>
</tr>
<tr>
<td>Announcements Discussions Events</td>
<td>Enabled Enabled Enabled</td>
<td>Events</td>
</tr>
<tr>
<td>Announcements           Disabled</td>
<td>Announcements</td>
<td>Enabled Enabled</td>
</tr>
</tbody>
</table>

In summary: If you want a subportal to inherit all tools from the parent portal, make sure that you enable all the tools in the parent portal before creating the subportal. If you want some of those tools to be immediately enabled in the subportal on creation, make sure that they are enabled in the portal template on which the subportal is based.

**Note:** If you create a sub-subportal (where a subportal is the parent portal), the inheritance in the sub-subportal is the same as in the topmost subportal of the hierarchy. In other words, all subportals in the tree inherit tools that are enabled in the initial parent portal.

When security is not inherited from the parent portal (see Section 5.6.1, "Modifying Inheritance Security Settings for a Subportal"), then the subportal inherits tools and enabled state from the portal template, and the tools in the parent portal are ignored, as shown in Table 5–2.
5.2 Viewing a Portal Hierarchy

The extent to which you can see subportals and parent portals depends on your role and permissions, as described in the following sections:

- Section 5.2.1, "Viewing Subportals of a Parent Portal"
- Section 5.2.2, "Viewing Parent Portals of a Subportal"

5.2.1 Viewing Subportals of a Parent Portal

If a portal includes subportals, you can access the subportals in any of the following ways, depending on the role you have:

- On the Home page of the parent portal, click the Subportals link if the page template in use exposes it.

  **Tip:** The location of the Subportals link depends on the page template in use by the portal. For example, it may be available through a Subportals menu in a side navigation template.

- In the portal administration (see Section 7.1, "Accessing Portal Administration"), click the Subportals link in the left navigation pane to display the Subportals page (Figure 5–1).

### Table 5–2 Tools Inheritance in Subportals When Security Is Not Inherited: Examples

<table>
<thead>
<tr>
<th>Tools in Parent Portal</th>
<th>Tools in Portal Template Used to Create SubPortal</th>
<th>Tools in Resulting Subportal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Available Tools</td>
<td>State</td>
<td>Available Tools</td>
</tr>
<tr>
<td>Announcements</td>
<td>Enabled</td>
<td>Enabled</td>
</tr>
<tr>
<td>Discussions</td>
<td>Disabled</td>
<td>Discussions</td>
</tr>
<tr>
<td>Events</td>
<td>Disabled</td>
<td>Events</td>
</tr>
<tr>
<td>Lists</td>
<td>Enabled</td>
<td>Lists</td>
</tr>
<tr>
<td>Announcements</td>
<td>Enabled</td>
<td>Enabled</td>
</tr>
<tr>
<td>Discussions</td>
<td>Enabled</td>
<td>Discussions</td>
</tr>
<tr>
<td>Events</td>
<td>Disabled</td>
<td>Events</td>
</tr>
<tr>
<td>Available Tools (from Template Available Tools)</td>
<td>State (from Template Available Tools)</td>
<td></td>
</tr>
<tr>
<td>Announcements</td>
<td>Enabled</td>
<td>Enabled</td>
</tr>
<tr>
<td>Discussions</td>
<td>Enabled</td>
<td>Discussions</td>
</tr>
<tr>
<td>Events</td>
<td>Disabled</td>
<td>Events</td>
</tr>
<tr>
<td>Lists</td>
<td>Enabled</td>
<td>Enabled</td>
</tr>
<tr>
<td>Announcements</td>
<td>Enabled</td>
<td>Enabled</td>
</tr>
<tr>
<td>Discussions</td>
<td>Enabled</td>
<td>Discussions</td>
</tr>
<tr>
<td>Events</td>
<td>Disabled</td>
<td>Events</td>
</tr>
<tr>
<td>Available Tools (from Template Available Tools)</td>
<td>State (from Template Available Tools)</td>
<td></td>
</tr>
<tr>
<td>Announcements</td>
<td>Disabled</td>
<td>Disabled</td>
</tr>
<tr>
<td>Discussions</td>
<td>Disabled</td>
<td>Disabled</td>
</tr>
<tr>
<td>Events</td>
<td>Disabled</td>
<td>Disabled</td>
</tr>
</tbody>
</table>

**Available Tools**

- Announcements: Enabled
- Discussions: Enabled
- Events: Enabled
- Lists: Enabled

**State**

- From Parent Portal: Enabled
- From Template: Enabled
- From Subportal: Enabled
Creating a Subportal

5.2.2 Viewing Parent Portals of a Subportal

Navigating from a subportal to a parent portal can be accomplished by adding a link to the page template for the subportal. This is a design decision made by the page template developer, and may be exposed depending on whether or not the security of the parent portal allows direct access from the subportal.

5.3 Creating a Subportal

You can create one or more subportals in a portal. From a parent portal, you can navigate to its subportals (see Section 5.2.1, "Viewing Subportals of a Parent Portal").
Creating a Subportal

1. Open the subportal creation wizard in any of the following ways:
   - When viewing a portal, there may be an action to create a subportal, depending on the page template in use. For example, in the Top Navigation page template, you click the *Actions* icon in the toolbar, and select *Create*, then *Subportal* (Figure 5–3). Note that some page templates may not include an Actions menu (for example, page templates that are designed for consumption only for mobile devices).

   ![Figure 5–3 Portal Actions Menu on Home Page: Create Subportal](image)

   - From the *Portals* menu, select *Portal Builder* to display the *Portals* page in Portal Builder. Select the portal for which you want to create a subportal, then click the *Actions* icon in the toolbar and select *Create Subportal* (Figure 5–4).

   *Note:* If you create a new asset (page template, skin, navigation, or resource catalogs) for a portal, the new custom asset is not shown for selection in the administration settings for subportals of the portal. To set an asset for a subportal to the same custom asset used by its parent portal, you must use an EL expression (see Section 7.3.2, "Changing the Page Template for a Portal", Section 7.3.3, "Changing the Skin for a Portal", Section 7.3.4, "Changing the Navigation for a Portal", and Section 7.3.5, "Changing the Resource Catalogs for Pages and the Page Template for a Portal"). To make a custom asset available for selection in all portals and subportals, it must be created at the application level (see Section 20.3, "Creating Assets").
From the Portals menu, select Portal Builder to display all portals on the Portals page in Portal Builder, then click the Subportals icon for a portal (Figure 5–5) to display the Subportals page for the portal (Figure 5–1).

In the portal administration (see Section 7.1, "Accessing Portal Administration"), click Subportals in the left navigation pane to display the Subportals page, then click Create (Figure 5–6).
Figure 5–6  Create Subportal Icon in Portal Administration

Tip: You can also navigate to this page using the pretty URL provided in Section A.7, "Pretty URLs for Pages in a Specified Portal."

The portal template selection screen displays (Figure 5–7)
2. **Select a Portal Template.** Explore the portal templates available to you to use as the basis for your new subportal, then click **Use This** beneath the template you want to use to display the portal specification screen (Figure 5–8).

**See Also:** Section 3.1, "About Portal Templates"

**Notes:**

- For information how tools and services are made available and enabled in a subportal, see Section 5.1.1, "Understanding Inheritance in Portal Hierarchies."

- A custom portal template may include preseeded data, such as discussions, documents, lists, member information (including roles), pages, or portal assets. When you select such a template, the new subportal 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 subportal, the template becomes invalid for your use and an error occurs.
3. **Title and Description.** Modify the default subportal title if desired and, optionally, enter a description and keywords for the subportal. Enter any keywords related to the content of the subportal to make it more easily discoverable in search results. Separate keywords with a space or comma.

The title that you enter here is the *display name* that displays at the top of the subportal and other places where portals are available for selection, such as the Portals menu and the Portals page. Subportal 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 subportal. For example, the display name *My Sub-Portal* generates the internal name *MySubPortal*. The URL to this subportal is *http://host:port/webcenter/portal/MySubPortal*.

4. **Attributes.** If shown, enter values for the custom attributes for the subportal.

**Note:** The Attributes section displays only if the selected portal template has custom attributes defined. *Figure 5–8* shows the screen when the portal template has no custom attributes defined.
5. **URL.** Modify the default URL for the subportal if desired. The internal name of the subportal is derived from this field.

6. **Access.** As stated on the screen, access settings for the subportal are inherited from the parent portal. To modify subportal access, see Section 5.6.1, "Modifying Inheritance Security Settings for a Subportal."

7. To create pages for your new subportal during subportal creation, providing a shortcut to creating multiple pages and subpages that are immediately available in your subportal, see Section 2.3, "Creating Pages When Creating a New Portal."

8. Click **Create.**

WebCenter Portal reports progress while creating the subportal, and notifies you when your subportal has been created, providing choices for your next step (Figure 5–9).

**Figure 5–9  Subportal Created**

![Subportal Created](image)

9. Click one of the selections under **What do you want to do next?**

   - **View your portal** to display the Home page of the new subportal, including immediate navigation to pages you created.
   - **Edit your portal** to open the subportal in the portal editor. For information about portal editing tasks, see Chapter 6, "Editing a Portal."
   - **Administer your portal** to open the administration settings for the subportal. For information about portal administration tasks, such as adding members to the subportal, see Chapter 7, "Administering a Portal."
   - (When the Documents tool is enabled in the portal template used) **Upload Documents** to display the Documents page, where you can manage and add documents in the subportal. For more information, see the "Creating and Managing Documents" chapter (specifically, the "Uploading Files" section) in Using Oracle WebCenter Portal.
Creating a Custom Portal Hierarchy Navigation

**Note:** Folders and files in the parent portal are not automatically available to the subportal. To add folders and files to the subportal, see Part VI, "Working with Content in a Portal."

- **Browse all portals** to open the portal browser (**Portals**) page (Figure 5–10).

![Figure 5–10 Portal Browser](image)

- **Create another subportal** to create another new subportal in the parent portal.

As the subportal creator, you are automatically granted the moderator role for this subportal, and can begin to populate, customize, and manage the subportal as required.

### 5.4 Creating a Custom Portal Hierarchy Navigation

Application specialists can build custom navigation models, which can be added to a portal to allow end users to easily navigate the portal hierarchy. For more information, see Section 22.3.3, "Adding Items to a Navigation Model" (select **Portal Query** to add subportals to a portal’s navigation).

### 5.5 Moving Subportals (Changing the Parent)

Only system administrators with the application-level Ports-Manage Security and Configuration permission can move subportals from their current parent portal. All of the metadata (such as pages, navigation, security, and so on) and data is maintained when a subportal is moved. For more information, see the "Moving a Portal or Subportal" section in Administering Oracle WebCenter Portal.

### 5.6 Managing a Subportal

Within a subportal, management tasks are the same as within any top-level portal, as described in the following chapters:

- Chapter 6, "Editing a Portal"
- Chapter 7, "Administering a Portal"
- Chapter 29, "Managing Roles and Permissions for a Portal"
- Chapter 30, "Managing Members and Assigning Roles in a Portal"

Additionally, subportals include the following administrative task that is not applicable to parent portals:
5.6.1 Modifying Inheritance Security Settings for a Subportal

On creation, a subportal inherits its initial security (members, roles, and permissions) from the parent portal. If you set custom security for the subportal, you cannot revert back to inheriting security from the parent portal.

To modify the members, roles, and permissions of a subportal:

1. In the subportal administration (see Section 7.1, "Accessing Portal Administration"), click the Security link in the left navigation pane (Figure 5–11).

2. On the Settings screen, click Stop Inheriting to specify that the subportal should not inherit security settings from the parent portal.

3. In the confirmation prompt, click Stop Inheriting.

Note that the Security screen now exposes Access, Roles, and Members tabbed pages (Figure 5–12).
4. Modify the security settings for the subportal as described in the following sections:
   - Chapter 29, "Managing Roles and Permissions for a Portal"
   - Chapter 30, "Managing Members and Assigning Roles in a Portal"

   **Note:** In a subportal, when you grant the View Documents permission to the Public-User role, the Authenticated-User role is also automatically granted the View Documents permission.
This part of *Building Portals with Oracle WebCenter Portal* provides information about management tasks for a portal.

- Chapter 6, "Editing a Portal"
- Chapter 7, "Administering a Portal"
- Chapter 8, "Customizing System Pages for a Portal"
- Chapter 9, "Managing Device Groups for a Portal"
- Chapter 10, "Customizing Task Flows for a Portal"
- Chapter 11, "Working with the Portal Browser Task Flow"
This chapter describes how to open the portal editor and edit a portal. Editing a portal allows you to add or modify the pages of the portal (including the Home page), as well as work with portal assets, membership roles and permissions, and documents.

This chapter includes the following topics:

- Section 6.1, "Opening the Portal Editor"
- Section 6.2, "Accessing Pages in the Portal Editor"
- Section 6.3, "Accessing Assets in the Portal Editor"
- Section 6.4, "Accessing Members in the Portal Editor"
- Section 6.5, "Accessing Documents in the Portal Editor"

---

**Permissions:** To perform the tasks in this chapter, you need the permissions specified in each section in this chapter.

For more information about permissions, see Section 29.1, "About Roles and Permissions for a Portal."

---

### 6.1 Opening the Portal Editor

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

- When viewing a portal, press Ctrl+Shift+E.
- When viewing a portal, select **Edit Page** (Figure 6–1). This menu item is shown only if you are the portal moderator or member with editing permissions in the portal.

**Tip:** The location of the **Edit Page** action depends on the page template in use. For example, you may access it through an **Actions** menu as shown in Figure 6–1.
Opening the Portal Editor

**Figure 6–1  Accessing Portal Editor When Viewing Portal**

- From the **Portals** menu, select **Portal Builder** to display the **Portals** page in Portal Builder. Locate the portal you want to edit, then click the **Edit** link for the portal (Figure 6–2). This link is shown only if you are the portal moderator or member with editing permissions in the portal.

**Figure 6–2  Accessing Portal Editor from Portals Page in Portal Builder**

- In the portal administration (see Section 7.1, "Accessing Portal Administration"), click the **Edit Portal** link (Figure 6–3).

**Figure 6–3  Accessing Portal Editor from Portal Administration**
6.2 Accessing Pages in the Portal Editor

Permissions: To work with pages in the portal editor, you need the following portal-level permissions:

- 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.

- Assets: Edit Assets (standard permissions) or Navigations: Edit Navigations (advanced permissions) as adding or deleting pages changes the portal navigation.

Note that when a role’s portal page permissions are added or revoked, WebCenter Portal does not automatically add or revoke permission to edit portal navigation for the users assigned to that role. Page and assets permissions must be explicitly added or revoked.

For more information about permissions, see Section 29.1, "About Roles and Permissions for a Portal."

In the portal editor (see Section 6.1, "Opening the Portal Editor"), click the Pages tab to create new pages, subpages, page variants, edit existing pages, or modify the portal navigation (Figure 6–4).

The Pages page in the portal editor displays one of the following views:

- Release 11.1.1.8.0 and later portals. If your portal is based on a portal template from WebCenter Portal release 1.1.1.8.0 or later, either an out-of-the-box template (see Table 3–1, "Out-of-the-Box Portal Templates and Categories") or a custom template, you will see a view similar to Figure 6–4.

By default, the view switcher is set to Composer, which displays the page editor, Composer.

To create new pages, subpages, page variants, edit existing pages, or modify the portal navigation, see Section 12.4, "Editing a Page."
You can click the view switcher to toggle between views (Figure 6–5).

With the view switcher set to Data (Figure 6–6), you can manage pages and other navigation items, including viewing and modifying page information, defining parameters, establishing page security, and specifying additional navigation options. For more information, see Chapter 13, "Managing a Portal Page."
Pre-11.1.1.8.0 portals. If your portal is based on a portal (space) template from a release prior to WebCenter Portal release 11.1.1.8.0 and you have not upgraded it to release 11.1.1.8.0 or later (for example, if you simply imported a space from a pre-11.1.1.8.0 release), you will see a view similar to Figure 6–7. Note that there is no support for hierarchical pages (subpages), page variants, or device preview, and the portal administration does not include a Device Settings page.
To upgrade a pre-11.1.1.8.0 portal (space) to support the full functionality of WebCenter Portal 11.1.1.8.0 and later releases, see Section 7.2.9, "Upgrading a Pre-11.1.1.8.0 Portal." Note that you can also continue to work with pre-11.1.1.8.0 portals in the current release without upgrading them.

### 6.3 Accessing Assets in the Portal Editor

**Permissions:** To work with assets in the portal editor, you need portal-level Assets permissions.

For more information about permissions, see Section 29.1, "About Roles and Permissions for a Portal."

In the portal editor toolbar (see Section 6.1, "Opening the Portal Editor"), click the Assets tab to modify asset settings or create new assets (Figure 6–8).

**Figure 6–8 Editing a Portal: Assets**

For more information, see Part IV, "Working with Portal Assets."
6.4 Accessing Members in the Portal Editor

**Permissions:** To work with members in the portal editor, you need the portal-level permission Manage Membership. A portal moderator has this permission by default.

For more information about permissions, see Section 29.1, "About Roles and Permissions for a Portal."

In the portal editor (see Section 6.1, "Opening the Portal Editor"), click the Members tab to add new members or groups to the portal, establish permissions, and define and assign roles (Figure 6–9).

**Figure 6–9 Editing a Portal: Members**

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

6.5 Accessing Documents in the Portal Editor

In the portal edit toolbar (see Section 6.1, "Opening the Portal Editor"), click the Documents tab to create and manage portal folders and files (Figure 6–10).

**Note:** The Documents tab is available only when the Documents tool is available and enabled in the portal. See Section 39.2, "Enabling and Disabling Tools and Services Available to a Portal."
Figure 6–10  Editing a Portal: Documents

For more information, see the "Creating and Managing Documents" chapter in Using Oracle WebCenter Portal.
This chapter describes how to administer an individual portal, including how to take a portal offline, close it, or delete it.

**Note:** Exporting and importing a portal is a system administrator task. See the "Exporting and Importing a Portal" section in *Administering Oracle WebCenter Portal*.

This chapter includes the following topics:

- Section 7.1, "Accessing Portal Administration"
- Section 7.2, "Administering Overview Settings and Actions for a Portal"
- Section 7.3, "Administering Look and Feel Settings for a Portal"
- Section 7.4, "Administering All Pages in a Portal"
- Section 7.5, "Administering All Assets in a Portal"
- Section 7.6, "Administering Attributes in a Portal"
- Section 7.7, "Administering Security in a Portal"
- Section 7.8, "Administering Tools and Services in a Portal"
- Section 7.9, "Administering Subportals in a Portal"
- Section 7.10, "Administering System Pages in a Portal"
- Section 7.11, "Administering Device Settings in a Portal"

**Permissions:** To perform the tasks in this chapter, you need the portal-level permission Manage Security and Configuration or Manage Configuration. A portal moderator has this permission by default.

Any user who accesses administration settings for a portal and does not have Manage permission (for example, a user with Participant role, granted permission to edit a page in the portal) will see only the settings available to their role and permissions.

For more information about permissions, see Section 29.1, "About Roles and Permissions for a Portal."
7.1 Accessing Portal Administration

You can access administration settings for a portal in any of the following ways:

- From the Portals menu, select Browse Portals to display the Portals page in the Home portal. Locate the portal you want to administer, then right-click the portal icon and select Administer (Figure 7–1). This menu item is shown only if you are the portal moderator or member with Manage Security and Configuration or Manage Configuration permission in the portal.

![Figure 7–1 Accessing Portal Administration from Portals Page in Home Portal](image)

- From the Portals menu, select Portal Builder to display the Portals page in Portal Builder. Locate the portal you want to administer, then click the Administer link for the portal (Figure 7–2). This link is shown only if you are the portal moderator or member with Manage Security and Configuration or Manage Configuration permission in the portal.

![Figure 7–2 Accessing Portal Administration from Portals Page in Portal Builder](image)

- When viewing a portal, select Manage, then All Settings (Figure 7–3). This menu item is shown only if you are the portal moderator 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 as shown in Figure 7–3.
In the portal editor (see Section 6.1, "Opening the Portal Editor"), click **Administer Portal** in the toolbar (Figure 7–4). This link is available to all users in the portal editor, but a user who does not have Manage permission (for example, a user with Participant role, granted permission to edit a page in the portal) will see only the portal administration settings available to their role and permissions.

The administration settings for a portal are accessible through the links in the left navigation pane to the portal administration pages:

<table>
<thead>
<tr>
<th>Portal Administration Page</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overview</td>
<td>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. For more information, see Section 7.2, &quot;Administering Overview Settings and Actions for a Portal.&quot;</td>
</tr>
<tr>
<td>Settings</td>
<td>Specify settings that define the look and feel of the portal. For more information, see Section 7.3, &quot;Administering Look and Feel Settings for a Portal.&quot;</td>
</tr>
<tr>
<td>Pages</td>
<td>Create a new portal page or subpage, edit a page, or add a page to the navigation. For more information, see Section 7.4, &quot;Administering All Pages in a Portal.&quot;</td>
</tr>
</tbody>
</table>
7.2 Administering Overview Settings and Actions for a Portal

The Overview 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 Overview page tasks:

- Section 7.2.1, "Accessing the Overview Settings and Actions for a Portal"
- Section 7.2.2, "Changing the Title of a Portal"
- Section 7.2.3, "Modifying the Description or Keywords for a Portal"
- Section 7.2.4, "Changing the Internal Name of a Portal"
- Section 7.2.5, "Closing or Activating a Portal"
- Section 7.2.6, "Taking a Portal Offline or Online"
- Section 7.2.7, "Enabling or Disabling RSS News Feeds for a Portal"
- Section 7.2.8, "Deleting a Portal"
- Section 7.2.9, "Upgrading a Pre-11.1.1.8.0 Portal"

7.2.1 Accessing the Overview Settings and Actions for a Portal

To access the overview administration settings and actions for a portal:

- In the portal administration (see Section 7.1, "Accessing Portal Administration"), click Overview in the left navigation pane (Figure 7–5).

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

http://host:port/webcenter/portal/portalName/admin/overview
7.2.2 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 Section 7.2.4, "Changing the Internal Name of a Portal."

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

1. On the **Overview** page in portal administration (see Section 7.2.1, "Accessing the Overview Settings and Actions for a Portal"), under **Portal Information**, modify the Title as desired (Figure 7–6).
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 Ports 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.

7.2.3 Modifying the Description or Keywords for a Portal

A portal description appears in the listing of the portal on the Portals page. Keywords are useful to make a portal more easily discoverable in search results.

To change the title (display name), description, or keywords for a portal:

1. On the Overview page in portal administration (see Section 7.2.1, "Accessing the Overview Settings and Actions for a Portal"), under Portal Information, modify the Description and/or Keywords as desired (Figure 7–7). Separate keywords with a space or comma.
2. Click Save.

### 7.2.4 Changing the Internal Name 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. If you wish to simply change the portal title; that is, the display name for the portal, see Section 7.2.2, "Changing the Title of a Portal."

To change the internal name of a portal:

1. On the Overview page in portal administration (see Section 7.2.1, "Accessing the Overview Settings and Actions for a Portal"), under Portal Details, click Rename next to the portal name (Figure 7–8).

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 changes to use the new internal name:
7.2.5 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 7–9).

Figure 7–9  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. See Section 7.2.6, "Taking a Portal Offline or Online."

To close a portal:

- On the Overview page in portal administration (see Section 7.2.1, "Accessing the Overview Settings and Actions for a Portal"), under Status, deselect the Active check box (Figure 7–10).

Figure 7–10  Closing or Activating a Portal

To reactivate the portal, select the Active check box.
7.2.6 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 (see Chapter 8, "Customizing System Pages for a Portal").

To permanently close down a portal that is not being used any more, see Section 7.2.5, "Closing or Activating a Portal."

To take a portal offline:

- On the Overview page in portal administration (see Section 7.2.1, "Accessing the Overview Settings and Actions for a Portal"), under Status, deselect the Online check box (Figure 7–11).

![Figure 7–11 Taking a Portal Offline or Online](image)

**Note:** An alternate way to close and reactivate a portal is:

- From the Portals menu, select Portal Builder to display the Portals page in Portal Builder. Select the portal that you want to close or reactivate, then click the Actions icon in the toolbar and select Close or Activate:
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 **Portal Builder** to display the **Portals** page in Portal Builder. 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**.

---

### 7.2.7 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:

- Monitor recent activities.
- Track contributions to discussion forums.
- View announcements.
- Watch for revisions to lists.

For more information about publishing RSS new feeds, see Chapter 54, "Adding RSS Feeds to a Portal."

To allow members access to portal information through RSS feeds:

- On the **Overview** page in portal administration (see Section 7.2.1, "Accessing the Overview Settings and Actions for a Portal"), under **Status**, select the **Publish RSS** check box (Figure 7–12).
To disable RSS feeds for this portal, deselect the Publish RSS check box.

7.2.8 Deleting a Portal

When a portal has been closed or inactive for some time, or it is no longer needed, you can remove it permanently from WebCenter Portal. A portal moderator 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.
- Content managed by discussions and announcements is deleted, when it is stored in the default forum or category created by the portal. Content managed by nondefault forums or categories is not deleted (for details, see Section 46.3, "Modifying Discussion Forum Settings for a Portal").
- The portal mail distribution list that is automatically created by WebCenter Portal is deleted. However, distribution lists that are customized by the portal moderator are not deleted (see Section 48.2, "Configuring the Mail Distribution List for a Portal").
- Content managed by external services, such as content repositories, mail, and so on, is removed.
- If the portal is a parent in a portal hierarchy, child subportals are deleted too.

To delete a portal:

1. On the Overview page in portal administration (see Section 7.2.1, "Accessing the Overview Settings and Actions for a Portal"), under Actions, select the Delete this Portal (Figure 7–13).
Alternate ways to delete a portal are:

- From the **Portals** menu, select **Browse Portals** to display the **Portals** page in the Home portal. Locate the portal that you want to delete, then right-click the portal icon or name, and select **Delete**.

- From the **Portals** menu, select **Portal Builder** to display the **Portals** page in Portal Builder. 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.
7.2.9 Upgrading a Pre-11.1.1.8.0 Portal

Permissions: To perform this task, you need the following portal-level permissions:

- Manage Security and Configuration or Manage Configuration
- Assets: Create, Edit, and Delete Assets (simple permissions) or Navigations: Create, Edit, and Delete Navigations (advanced permissions)

A portal moderator has these permissions by default.

For more information about permissions, see Section 29.1, "About Roles and Permissions for a Portal."

You may have portals from a pre-11.1.1.8.0 release when you upgrade WebCenter Portal from a pre-11.1.1.8.0 release, which carries over any portals built in the pre-11.1.1.8.0 release.

You can work with pre-11.1.1.8.0 portals in the current release and they will continue to operate as they did in releases prior to 11.1.1.8.0. However, the following features are not available in pre-11.1.1.8.0 portals:

- Page hierarchies (subpages)
- Page variants (for display on other devices such as tablets and mobile phones)
- Device preview
- **Device Settings** page in portal administration
- Centralized page editing and management

See Section 7.4.1, "Accessing Pages Administration for a Portal" and Section 6.2, "Accessing Pages in the Portal Editor" for examples that show the differences between managing and editing pages in a current release portal versus a pre-11.1.1.8.0 portal.

To take advantage of the full functionality of 11.1.1.8.0 and later releases, you can upgrade a pre-11.1.1.8.0 portal. Table 7–1 describes the changes made to a pre-11.1.1.8.0 portal during upgrade. See also Table 7–2, "Before and After Upgrade: Editing and Viewing a Portal" in the steps below to see how these changes are reflected in the user interface.
Table 7–1  Upgrading a Pre-11.1.1.8.0 Portal

<table>
<thead>
<tr>
<th>Before Upgrade</th>
<th>After Upgrade</th>
</tr>
</thead>
<tbody>
<tr>
<td>A portal navigation model can be a shared (application-level) asset, or a portal-level asset.</td>
<td>Portal navigation is a portal-level asset only, and cannot be a shared asset. Beginning with</td>
</tr>
<tr>
<td></td>
<td>Release 11.1.1.8.0, portal pages, page hierarchy, and page security are tightly integrated with</td>
</tr>
<tr>
<td></td>
<td>portal navigation, and therefore a portal's navigation cannot be deleted or changed to a different</td>
</tr>
<tr>
<td></td>
<td>navigation model. However, you can edit the default portal navigation model, Portal Default</td>
</tr>
<tr>
<td></td>
<td>Navigation Model, to add other resources to it, including references to other navigation models, as</td>
</tr>
<tr>
<td></td>
<td>described in Section 22.3.3, “Adding Items to a Navigation Model.”</td>
</tr>
<tr>
<td></td>
<td>■ If the pre-11.1.1.8.0 portal navigation model is a shared asset, the portal navigation is copied</td>
</tr>
<tr>
<td></td>
<td>as a portal-level asset and named Portal Default Navigation Model, which is used as the navigation</td>
</tr>
<tr>
<td></td>
<td>model for the upgraded portal.</td>
</tr>
<tr>
<td></td>
<td>■ If the pre-11.1.1.8.0 portal navigation model is a portal-level asset, the upgraded portal uses</td>
</tr>
<tr>
<td></td>
<td>the same existing navigation model, retaining the same name.</td>
</tr>
<tr>
<td>No support for hierarchical page structure (subpages)</td>
<td>Subpages can be created and managed for any parent page (see Section 12.2, “Creating Pages or</td>
</tr>
<tr>
<td></td>
<td>Subpages in a Portal” and Section 12.3, “Creating a Page Variant for a Device Group”).</td>
</tr>
<tr>
<td>No support for page variants that render on different devices, device preview, or device settings.</td>
<td>Page variants can be previewed, created, and managed for any page (see Section 12.1.2, “Previewing</td>
</tr>
<tr>
<td></td>
<td>a Page Variant for a Device” and Section 13.3, “Creating a Page Variant for a Device Group”).</td>
</tr>
<tr>
<td>Pages and page visibility are managed on a Pages page that reflects the Page Manager in prior</td>
<td>Pages, page visibility, and navigation are managed on the Pages page (see Chapter 13, “Managing a</td>
</tr>
<tr>
<td>releases (see Figure 6–7, “Pages Page (for pre-11.1.1.8.0 portals)”), and navigation is managed</td>
<td>Portal Page”). The page visibility setting is retained in the upgraded portal.</td>
</tr>
<tr>
<td>on the Assets page.</td>
<td>Page security is maintained from the prior portal and managed on the Pages page (see Section 13.15,</td>
</tr>
<tr>
<td></td>
<td>“Setting Page Security”). The upgraded portal includes hierarchical page security (subpages can</td>
</tr>
<tr>
<td>Page security is managed through the Page Manager.</td>
<td>either inherit parent page security, or override these settings to set their own security.</td>
</tr>
<tr>
<td>Page parameters are set in the Page Properties dialog.</td>
<td>Page parameters are maintained from the prior portal and managed on the PageDef tab in the page</td>
</tr>
<tr>
<td></td>
<td>added after upgrade are managed on the Pages page (see Section 13.11, “Adding or Modifying Page</td>
</tr>
<tr>
<td></td>
<td>Parameters”).</td>
</tr>
</tbody>
</table>
To upgrade a pre-11.1.1.8.0 portal to the current release:

1. On the **Overview** page in portal administration (see **Section 7.2.1, "Accessing the Overview Settings and Actions for a Portal"**), confirm that the portal is a candidate for upgrade by noting the presence of an **Upgrade** section (Figure 7–14). If there is no **Upgrade** section, the portal has already been upgraded, or it was created in release 11.1.1.8.0 or later.

   ![Figure 7–14 Upgrade Section on Overview Page](image)

   **Upgrade**

   ![Upgrade this portal](image)

2. Under **Status**, deselect the **Online** check box to take the portal offline.

3. If you do not have a backup of the portal, ask your system administrator to export it to a backup file, as described in "Creating Portal Archives" in *Administering Oracle WebCenter Portal*.

4. Click **Upgrade this portal**, click **Upgrade** again in the confirmation dialog (Figure 7–15), then click **Upgrade** in the second confirmation dialog.

   ![Figure 7–15 Upgrade Portal Confirmation Dialog](image)

5. When the notification of successful upgrade displays, click **OK**.

   Notice that the **Upgrade** section on the **Overview** page no longer displays for this portal.

6. Log out and in again to refresh your upgraded portal to show the **Device Settings** page in portal administration. To manage device settings, see **Section 7.11, "Administering Device Settings in a Portal."**

7. View the upgraded portal, which will reflect the following changes:

   - Business role pages (such as Documents, Discussions, and so on) from the prior portal are added to the upgraded portal as new page links. In the portal navigation, the page visibility setting from the prior portal is maintained to determine which business role pages are shown in the navigation. If you delete a page link in the navigation (see **Section 22.3, "Editing a Navigation Model"**), you delete only the navigation entry, not the page itself.

   - Pages from the prior portal are added to the upgraded portal as new pages. In the portal navigation, the page visibility setting from the prior portal is
maintained to determine which pages are shown in the navigation. If you delete a page item in the navigation (see Section 13.5, "Deleting a Page"), you delete the page itself.

- Pages queries from the prior portal navigation are carried over to the upgraded portal. The prior portal navigation may have used pages queries to show portal pages and business role pages, and build the navigation hierarchy. As a result, your initial upgraded portal navigation will contain duplicate entries for any business role or portal pages that are also exposed by a pages query. Oracle strongly recommends that you use the newly added page links and pages to manage your portal navigation, then once you have refined the navigation as desired, delete the unneeded navigation entries.

---

**Note:** The visibility setting of a pages query filters the results of the query to expose in the navigation one of the following:

- Only those pages whose Visibility property is selected
- Every page regardless of their Visibility property setting
- Only those pages whose Visibility property is deselected

For more information, see Section 13.9, "Showing or Hiding a Page in the Portal Navigation" and Table 22–1, "Fields for Specific Navigation Model Items".

---

- Other navigation items (such as content queries, portlets, or task flows) are carried over to the upgraded portal navigation.

The images in Table 7–2 illustrate what you will see when editing and viewing a pre-11.1.1.8.0 portal before and after upgrade.
### Table 7–2  Before and After Upgrade: Editing and Viewing a Portal

<table>
<thead>
<tr>
<th>Editing a Portal</th>
<th>Viewing a Portal</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Before</strong></td>
<td>Pre-11.1.1.8.0 portal in portal editor (<strong>Pages</strong> page). The view is the same on the <strong>Pages</strong> page in portal administration.</td>
</tr>
<tr>
<td>Before Pre-11.1.1.8.0 portal navigation.</td>
<td></td>
</tr>
<tr>
<td><strong>After</strong></td>
<td>Upgraded portal in portal editor (<strong>Pages</strong> page). The view is the same on the <strong>Pages</strong> page in portal administration.</td>
</tr>
<tr>
<td>After Upgraded portal initial navigation.</td>
<td></td>
</tr>
</tbody>
</table>

#### Before
- The view is the same on the **Pages** page in portal administration.

#### After
- Upgraded portal initial navigation.
- Navigation generated by pages query named **Pages**, which is defined in the navigation model to display all visible pages in the portal.
8. Refine and develop the portal navigation as required, and implement newer functionality:

- Hide or delete pages queries and other navigation items that are no longer needed or you do not want exposed. See Section 22.3, "Editing a Navigation Model."
- Manage page links and pages, including deleting unneeded pages, and setting page properties and visibility. See Chapter 13, "Managing a Portal Page."
- Create additional pages and subpages, as needed. See Chapter 12, "Creating and Editing a Portal Page."
- Add page variants, as needed. See Section 12.1.2, "Previewing a Page Variant for a Device" and Section 12.3, "Creating a Page Variant for a Device Group."

9. On the Overview page in portal administration, under Status, select the Online check box to move the portal online.

---

Note: If you wish to revert to the original portal, delete the upgraded portal (see Section 7.2.8, "Deleting a Portal"), and ask your system administrator to import the pre-11.1.1.8.0 backup of the portal, as described in "Importing One or More Portals from an Archive" in Administering Oracle WebCenter Portal.

---

7.3 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, navigation, header and footer, copyright and privacy statements, language, icon, and logo. This page also allows you to define the resource catalogs that contain the components you can add to pages and page templates, and specify the behavior when the page is displayed on another device. The following sections describe the Settings page tasks:

- Section 7.3.1, "Accessing Look and Feel Settings for a Portal"
- Section 7.3.2, "Changing the Page Template for a Portal"
- Section 7.3.3, "Changing the Skin for a Portal"
- Section 7.3.4, "Changing the Navigation for a Portal"
- Section 7.3.5, "Changing the Resource Catalogs for Pages and the Page Template for a Portal"
- Section 7.3.6, "Setting Page Behavior for a Portal When No Page Variant Exists""
- Section 7.3.7, "Displaying or Hiding a Page Footer in a Portal"
- Section 7.3.8, "Customizing the Copyright Statement and Privacy URL in a Portal"
- Section 7.3.9, "Setting a Portal Display Language"
- Section 7.3.10, "Changing the Portal Icon"
- Section 7.3.11, "Changing the Portal Logo"

7.3.1 Accessing Look and Feel Settings for a Portal

To access the asset, options, icon, and logo settings for a portal:
In the portal administration (see Section 7.1, "Accessing Portal Administration"), click **Settings** in the left navigation pane (Figure 7–16).

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

**See Also:** Appendix A, "WebCenter Portal Pretty URLs"

### 7.3.2 Changing the Page Template for a Portal

A page template defines how all pages in a portal display on a user’s screen. For more information about page templates, see Chapter 21, "Working with Page Templates."

WebCenter Portal provides several out-of-the-box page templates (see Section 21.1.1, "About Built-in Page Templates"). Alternatively, portal designers can create custom page templates to offer more ways to display pages on the screen, as described in Section 21.3, "Creating a Page Template." Within a portal, you can copy or customize an existing page template, as described below and in Section 7.5, "Administering All Assets in a Portal."

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.

**See Also:** Chapter 24, "Working with Skins"

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.

**See Also:** Section 21.5, "Setting the Preferred Skin for a Page Template"

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, as described in the "Choosing a Default Page Template" section in *Administering Oracle WebCenter Portal*.

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

- On the **Settings** page in portal administration (see Section 7.3.1, "Accessing Look and Feel Settings for a Portal"), under **Assets**, select a new **Page Template** (Figure 7–17).

**Figure 7–17  Changing the Page Template for a Portal**

![Image of page templates](image)

The page templates that are listed are those that are made available to the portal on the **Shared Assets** or **Assets** page (see Section 20.5.3, "Showing and Hiding Assets"). The [system default] selection applies the page template specified as the default for all portals by the system administrator, as described in the "Choosing a Default Page Template" section in *Administering Oracle WebCenter Portal*.

You can add custom page templates for the portal to this list in two ways:
- Copy an existing page template into a new page template, completely separate from the original, as described in Section 7.5, "Administering All Assets in a Portal."

- Customize an application-level page template to create a new page template for the portal. Any changes that are subsequently made to the page template at the application level are automatically cascaded down to the page template at the portal level. See Section 21.6, "Customizing a Shared Page Template for a Portal."

---

**Note:** If you create a new page template for a portal, the custom page template is not shown in the Page Template list for subportals of the portal. To set the page template for a subportal to the same page template used by its parent portal, you must use an EL expression. If you need EL assistance, an application developer can provide an EL expression; see the "Expression Language Expressions” appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

To make a custom page template available in the Page Templates list for all portals and subportals, it must be created as a shared asset for all portals (see Section 59.3, "Creating Shared Assets").

---

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 the "Expression Language Expressions” appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

For example: in a subportal, the following EL expression sets the Page Template to the same setting as the parent portal:

\{srmContext.resourceType['siteTemplate'].displayName['parent_page_template'].singleResult\}

### 7.3.3 Changing the Skin for a Portal

A skin defines the appearance and look and feel of a portal. For more information about skins, see Chapter 24, "Working with Skins."

WebCenter Portal provides several out-of-the-box skins (see Section 24.1, "About Skins"). Alternatively, portal designers can develop custom skins to reflect a personality, or to incorporate specific branding, as described in Section 24.3, "Creating a Skin." Within a portal, you can copy an existing skin, as described below and in Section 7.5, "Administering All Assets in a Portal."

By default, a portal inherits its skin from the default specified for all portals by the system administrator, as described the "Choosing a Default Skin" section in Administering Oracle WebCenter Portal.

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.

**See Also:** Section 21.5, "Setting the Preferred Skin for a Page Template"
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, Fusion FX.

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

To change the skin for a portal:

- On the **Settings** page in portal administration (see Section 7.3.1, "Accessing Look
  and Feel Settings for a Portal"), under **Assets**, select a new **Skin** (Figure 7–18).

**Figure 7–18  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 (see Section 20.5.3, "Showing and Hiding Assets").
The **system default** selection applies the skin specified as the default for all
portals by the system administrator, as described in the "Choosing a Default Skin"
section in Administering Oracle WebCenter Portal.

You can add custom skins for the portal to this list by copying an existing skin into
a new skin. For more information, see Section 7.5, "Administering All Assets in a
Portal."

**Note:** If you create a new skin for a portal, the custom skin is not
shown in the **Skin** list for subportals of the portal. To set the skin for a
subportal to the same skin used by its parent portal, you must use an
EL expression. If you need EL assistance, an application developer can
provide an EL expression; see the "Expression Language Expressions"
appendix in Developing Portals with Oracle WebCenter Portal and Oracle
JDeveloper.

To make a custom skin available in the **Skin** list for all portals and
subportals, it must be created as a shared asset for all portals (see
Section 59.3, "Creating Shared Assets").

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 down arrow 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 the "Expression Language
Expressions” appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper

7.3.4 Changing the Navigation for a Portal

Navigation enables portal members to see what information the portal provides and to get to that information quickly and easily. For more information about portal navigation, see Chapter 22, “Working with Navigation Models.”

The navigation model for a portal is part of the portal definition, including the portal page and security information. Therefore, as shown in Figure 7–19, it is not possible to change to a different navigation model for a portal. However, can change a portal’s navigation in the following ways:

- To edit the default navigation model for a portal, see Section 22.3.1, "Editing the Portal Default Navigation Model in the Portal Editor."
- To alter the way in which the navigation displays (for example, in a side pane, or in tabs along the top of the portal), see Section 7.3.2, “Changing the Page Template for a Portal.”
- To add and remove items from the portal navigation, see Section 22.3.3, “Adding Items to a Navigation Model.”

Figure 7–19  Default Navigation for a Portal

7.3.5 Changing the Resource Catalogs for Pages and the Page Template for a Portal

When you edit a page or page template in a portal, the resource catalog exposes the resources that you can select to add to the page or page template. For more information about resource catalogs, see Chapter 23, “Working with Resource Catalogs.”

WebCenter Portal provides two out-of-the-box resource catalogs for pages and the page templates in a portal:

- Default Portal Catalog for editing individual pages and task flows in a portal.
- Default Page Template Catalog for editing page templates. 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, as described in Section 23.4, "Creating a Resource Catalog." Within a portal, you can create a new resource catalog from scratch or copy an existing resource catalog into a new resource catalog, as described below and in Section 7.5, "Administering All Assets in a Portal.”
You can optionally select different resource catalogs for the portal, overriding the Added inline graphic icon, which can be seen in figure above settings.

To change the resource catalogs used to edit pages or the page template in a portal:

- On the **Settings** page in portal administration (see Section 7.3.1, "Accessing Look and Feel Settings for a Portal"), under **Assets**, select a new resource catalog from the **Resource Catalog for Pages** or **Resource Catalog for Page Templates** lists (Figure 7–20).

**Figure 7–20  Choosing a Resource Catalog for a Portal**

![Choosing a Resource Catalog for a Portal](image)

The **[system default]** selection applies the resource catalogs specified as the default for all portals by the system administrator, as described in the "Choosing Default Resource Catalogs" section in *Administering Oracle WebCenter Portal*.

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. For more information, see Section 7.5, “Administering All Assets in a Portal.”

---

**Note:** If you create a new resource catalog for a portal, the custom resource catalog is not shown in the **Resource Catalog** lists for subportals of the portal. To set the resource catalogs for a subportal to the same resource catalogs used by its parent portal, you must use an EL expression. If you need EL assistance, an application developer can provide an EL expression; see the "Expression Language Expressions" appendix in *Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper*.

To make a custom resource catalog available in the **Resource Catalog** lists for all portals and subportals, it must be created as a shared asset for all portals (see Section 59.3, "Creating Shared Assets").

---

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 the "Expression Language Expressions" appendix in *Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper*.
7.3.6 Setting 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 a tablet or an iPhone) 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 moderator, you can set the page fallback behavior for all pages in the portal. To override the portal-level setting for an individual page, see Section 13.10, "Setting Page Behavior for a Specific Page When No Page Variant Exists."

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. See Section 9.3.3, "Setting a Default Device Group."

---

**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:**

- Chapter 9, "Managing Device Groups for a Portal"
- Section 12.1.2, "Previewing a Page Variant for a Device"
- Section 12.1.3, "Filtering a Portal Page Listing by Device Group"
- Section 12.3, "Creating a Page Variant for a Device Group"
- Section 13.10, "Setting Page Behavior for a Specific Page When No Page Variant Exists"

At the application-level, your system administrator performs the following tasks described in Administering Oracle WebCenter Portal:

- Configures device group settings, as described in the "Administering Device Settings" chapter
- Creates page variants for system pages, as described in the "Creating a Page Variant of a System Page for Device Groups" section

---

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 (see Section 7.3.1, "Accessing Look and Feel Settings for a Portal"), under Devices, select the required Page Fallback setting (Figure 7–21):
   - 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 7–21 Setting Page Fallback Behavior When No Page Variant Exists for Current Device

<table>
<thead>
<tr>
<th>Devices</th>
<th>Page Fallback When no page variant exists for the device in use:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Display default page</td>
</tr>
<tr>
<td></td>
<td>Display no page</td>
</tr>
</tbody>
</table>

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, as described in Section 13.10, "Setting Page Behavior for a Specific Page When No Page Variant Exists."

### 7.3.7 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 (see Section 7.3.1, "Accessing Look and Feel Settings for a Portal"), under Options, select the Footer check box to display a page footer (Figure 7–22), or deselect the check box to hide the page footer.

Figure 7–22 Displaying or Hiding the Page Footer in a Portal

**Options**

- Footer [ ] Display page footer
- Copyright: Default Message
- Privacy URL: Default Message
- Default Language: [system default]  
  Customize

2. Click Save.

### 7.3.8 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 7–23 and Figure 7–24):
Administering Look and Feel Settings for a Portal

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

1. On the Settings page in portal administration (see Section 7.3.1, "Accessing Look and Feel Settings for a Portal"), under Options, select Footer to display the area at the bottom of the portal for the copyright statement and privacy URL (Figure 7–25). Deselect the check box to hide the page footer, including the copyright statement and privacy URL.

2. In the Copyright and Privacy URL fields, enter appropriate values.

3. Click Save.

### 7.3.9 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 Chapter 61, "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 (on her Preferences page) 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.
To set a portal display language:

1. On the **Settings** page in portal administration (see Section 7.3.1, "Accessing Look and Feel Settings for a Portal"), under **Options**, select a language for the portal from the **Default Language** list ([Figure 7–26](#)).

![Figure 7–26 Setting the Portal Display Language](image)

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 the "Expression Language Expressions" appendix in *Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper*.

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.

### 7.3.10 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 ([Figure 7–27](#)) at the top of the portal ([Figure 7–28](#)), or on the **Portals** page in Portal Builder ([Figure 7–29](#)).
A default icon is provided by the 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 (see Section 7.3.1, "Accessing Look and Feel Settings for a Portal"), under Icon and Logo, click Change next to the current portal icon (Figure 7–30) to open the Select an Icon dialog (Figure 7–31).
2. In the Select Icon dialog, either:

- Select **Upload image**, then **Browse** 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 formats are `.gif` or `.GIF`, `.png` or `.PNG`, and `.jpg` or `.JPG`. If the file is not uploading, check the size of the file you are trying to upload. The 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**.

### 7.3.11 Changing the Portal Logo

The portal logo displays alongside the portal name in larger areas. For example, it may display on the `Portals` page in the Home portal (portal browser) (**Figure 7–32**).
A default logo is provided by the template used when you create the portal, but you can assign a different logo if desired.

To change a portal logo:

1. On the Settings page in portal administration (see Section 7.3.1, "Accessing Look and Feel Settings for a Portal"), under Icon and Logo, click Change next to the current portal logo (Figure 7–33) to open the Select a Logo dialog (Figure 7–34).
2. In the Select Logo dialog, either:
   - Select **Upload image**, then **Browse** 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 for best results. Supported file formats are .gif or .GIF, .png or .PNG, and .jpg or .JPG. If the file is not uploading, check the size of the file you are trying to upload. The 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**.

### 7.4 Administering All Pages in a Portal

**Permissions:** To administer pages in a portal, you need at least the following portal-level permissions:

- Manage Security and Configuration
- Basic Services: Edit Page Access and Structure

A portal moderator has these permissions by default.

For more information about permissions, see Section 29.1, "About Roles and Permissions for a Portal."

The **Pages** page in portal administration allows you to create pages and subpages in the current portal, as well as add and manage pages and other navigation items to the portal navigation. The following sections describe the **Pages** page tasks:

- Section 7.4.1, "Accessing Pages Administration for a Portal"
- Section 7.4.2, "Working with Portal Pages (from Portal Administration)"

#### 7.4.1 Accessing Pages Administration for a Portal

To access the pages administration for a portal:

- In the portal administration (see Section 7.1, "Accessing Portal Administration"), click **Pages** in the left navigation pane.
You can also enter the following URL in your browser to navigate directly to the Pages page:

http://host:port/webcenter/portal/portalName/admin/pages

**See Also:** Appendix A, "WebCenter Portal Pretty URLs"

The Pages page in the portal administration displays one of the following views:

- **Release 11.1.1.8.0 and later portals.** If your portal is based on a portal template from WebCenter Portal 11.1.1.8.0 or later, either an out-of-the-box template (see Table 3–1, "Out-of-the-Box Portal Templates and Categories") or a custom template, you will see a view similar to Figure 7–35.

  **See Also:** Section 3.1, "About Portal Templates"

  To manage pages, see Section 7.4.2, "Working with Portal Pages (from Portal Administration)."

**Figure 7–35 Portal Administration: Pages Page (11.1.1.8.0 or later portal template)**

Pre-11.1.1.8.0 portals. If your portal is based on a portal (space) template from a release prior to WebCenter Portal release 11.1.1.8.0 and you have not upgraded it to release 11.1.1.8.0 or later (for example, if you simply upgrade WebCenter Portal from a pre-11.1.1.8.0 release, which carries over any portals built in that release), you will see a view similar to Figure 7–36. Note that this view does not include a **Device Settings** page, and there is no support for hierarchical pages (subpages), page variants, or device preview.
To upgrade a pre-11.1.1.8.0 portal (space) to support the full functionality of WebCenter Portal 11.1.1.8.0 and later releases, see Section 7.2.9, "Upgrading a Pre-11.1.1.8.0 Portal." Note that you can also continue to work with pre-11.1.1.8.0 portals in the current release without upgrading them.

### 7.4.2 Working with Portal Pages (from Portal Administration)

As an application specialist, portal moderator, or member with Manage Configuration permission in the portal, you can manage all the pages of a portal. The tasks are the same as those that can be performed in the portal editor by portal members with the portal-level Basic Services: Edit Page Access, Structure, and Content permission.

From the Pages page in portal administration (see Section 7.4.1, "Accessing Pages Administration for a Portal"), you can perform the following tasks:

- **Create a new page, subpage, or page variant.** See Section 12.2.2, "Creating a Page or Subpage in an Existing Portal" and Section 12.3, "Creating a Page Variant for a Device Group."
- **Edit the selected page,** including page background and layout. See Section 12.4, "Editing a Page."
- **Add existing resources to the navigation.** See Section 13.2, "Adding an Existing Page to the Portal Navigation" and Section 22.3.3, "Adding Items to a Navigation Model."
- **Copy a page to create a new page.** Make a personal copy of a page. See Section 13.4, "Copying a Page."
- **Delete a page.** See Section 13.5, "Deleting a Page."
- **View details about a page.** See Section 13.6, "Viewing Information About a Page."
- **Rename a page.** See Section 13.7, "Renaming a Page."
- **Edit a page description.** See Section 13.8, "Entering or Changing a Page Description."
Administering All Assets in a Portal

Show or hide a page in the portal navigation. See Section 13.9, "Showing or Hiding a Page in the Portal Navigation."

Set the fallback behavior when a page is displayed on a device. See Section 13.10, "Setting Page Behavior for a Specific Page When No Page Variant Exists."

Add a page parameter. See Section 13.11, "Adding or Modifying Page Parameters."

Modify the selected page layout. See Section 13.12, "Adjusting the Widths of Page Columns."

Add a header or footer to the selected page. See Section 13.13, "Adding a Page Header and Footer."

View and edit page source code. See Section 13.14, "Viewing and Modifying Page Source Code."


7.5 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:

- Section 7.5.1, "Accessing Assets Administration for a Portal"
- Section 7.5.2, "Working with Assets in Portal Administration"

7.5.1 Accessing Assets Administration for a Portal

To access the assets administration for a portal:

- In the portal administration (see Section 7.1, "Accessing Portal Administration"), click Assets in the left navigation pane (Figure 7–37).

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: Appendix A, "WebCenter Portal Pretty URLs"
7.5.2 Working with Assets in Portal Administration

See Part IV, "Working with Portal Assets."

7.6 Administering Attributes in a Portal

The Attributes page in portal administration allows you to define custom attributes for the portal. The following sections describe the Attributes page tasks:

- Section 7.6.1, "Accessing Attributes Administration for a Portal"
- Section 7.6.2, "Working with Attributes in Portal Administration"

7.6.1 Accessing Attributes Administration for a Portal

To access the attributes administration for a portal:

- In the portal administration (see Section 7.1, "Accessing Portal Administration"), click Attributes in the left navigation pane (Figure 7–38).

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

http://host:port/webcenter/portal/portalName/admin/attributes

See Also: Appendix A, "WebCenter Portal Pretty URLs"
7.6.2 Working with Attributes in Portal Administration

This section contains the following topics:

- Section 7.6.2.1, "About Portal Attributes"
- Section 7.6.2.2, "Adding a Portal Attribute"
- Section 7.6.2.3, "Editing a Portal Attribute"
- Section 7.6.2.4, "Deleting a Portal Attribute"

7.6.2.1 About 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 define global custom attributes, which are available for use by any portal, as described in the "Working with Global Attributes Across Portals" chapter in Administering Oracle WebCenter Portal.

A custom attribute is simply a name value pair (such as customerId=400, orderId=11, or userName=Smith). The custom attribute name is unique within a portal. 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 Section 19.4, "Passing Parameter Values Through the Page URL." If you need EL assistance, an application developer can provide an EL expression; see the "Expression Language Expressions" appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

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.

7.6.2.2 Adding a Portal Attribute

To add a custom attribute for a portal:

1. On the Attributes page (see Section 7.6.1, "Accessing Attributes Administration for a Portal"), click Add Attribute (Figure 7–39).

![Figure 7–39 Portal Administration: Add Attribute](image)

The Add Attribute dialog opens (Figure 7–40).
2. Enter a unique **Name** for the attribute. Valid names start with an alphabetic character and contain only alphanumeric characters.

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

4. Click **Add** to save the custom attribute and display it in the list on the **Attributes** page.

### 7.6.2.3 Editing a Portal Attribute

To edit a custom attribute for a portal:

1. On the **Attributes** page (see Section 7.6.1, "Accessing Attributes Administration for a Portal"), click the **Actions** icon for the attribute and select **Edit Attribute**.

2. In the Edit Attribute dialog, modify the attribute **Value**. The value you type is treated as a string value.

3. Click **OK** to save your changes.

### 7.6.2.4 Deleting a Portal Attribute

To delete a global attribute:

1. On the **Attributes** page (see Section 7.6.1, "Accessing Attributes Administration for a Portal"), click the **Actions** icon for the attribute and select **Delete Attribute**.

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

### 7.7 Administering Security in a Portal

**Permissions:** To administer security in a portal, you need at least the following portal-level permissions:

- Manage Security and Configuration
- Manage Membership

A portal moderator has these permissions by default.

For more information about permissions, see Section 29.1, "About Roles and Permissions for a Portal."

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:
7.7.1 Accessing Security Administration for a Portal

To access the security administration for a portal:

- In the portal administration (see Section 7.1, "Accessing Portal Administration"), click Security in the left navigation pane (Figure 7–41).

You can also enter the following URLs in your browser to navigate directly to the Security subpages:

http://host:port/webcenter/portal/portalName/admin/roles
http://host:port/webcenter/portal/portalName/admin/members

See Also: Appendix A, "WebCenter Portal Pretty URLs"

Figure 7–41 Portal Administration: Security

7.7.2 Changing the Access to a Portal

Access to a portal is defined when the portal is created (see Section 2.1, "About Creating a New Portal"). 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 (see Section 7.7.1, "Accessing Security Administration for a Portal"), click the Access subtab and select how you want the portal to be exposed:
Figure 7–42  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 grant public users permissions to view announcements, discussions, and documents, you need to grant these permissions, as described in Section 4.5, "Granting Public Access to a 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 on the Portals page and will appear in search results.

- **Hidden**: To access the portal, membership is required (through invitation). The portal will not be shown in the list of available portals on the Portals page and will not appear in search results.

1. Click Save.

7.7.3 Managing Roles and Permissions in a Portal

To manage the roles for assigning permissions in a portal:

1. On the Security page (see Section 7.7.1, "Accessing Security Administration for a Portal"), click the Roles subtab.

2. To work with portal roles, refer to Chapter 29, "Managing Roles and Permissions for a Portal."

7.7.4 Managing Members in a Portal

To manage the membership in a portal:

1. On the Security page (see Section 7.7.1, "Accessing Security Administration for a Portal"), click the Members subtab.

2. To work with portal membership, refer to Chapter 30, "Managing Members and Assigning Roles in a Portal."

7.8 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 Announcements, Discussions, Documents, Events, and Lists. The following sections describe the Tools and Services page tasks:

- Section 7.8.1, "Accessing Tools and Services Administration for a Portal"
- Section 7.8.2, "Working with Tools and Services in Portal Administration"
7.8.1 Accessing Tools and Services Administration for a Portal

To access the tools and services administration for a portal:

- In the portal administration (see Section 7.1, "Accessing Portal Administration"), click **Tools and Services** in the left navigation pane (Figure 7–43).

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: Appendix A, "WebCenter Portal Pretty URLs"

Figure 7–43 Portal Administration: Tools and Services

7.8.2 Working with Tools and Services in Portal Administration

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, as described in the "Managing Tools and Services" chapter in Administering Oracle WebCenter Portal. Also see

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 Part VII, "Working with Portal Tools and Services."

7.9 Administering Subportals in a Portal

The **Subportals** page in portal administration allows you to manage the subportals of the current parent portal. The following sections describe the **Subportals** page tasks:

- Section 7.9.1, "Accessing Subportals Administration for a Portal"  
- Section 7.9.2, "Working with Subportals in Portal Administration"
7.9.1 Accessing Subportals Administration for a Portal

To access the subportals administration for a portal:

- In the portal administration (see Section 7.1, "Accessing Portal Administration"), click Subportals in the left navigation pane (Figure 7–44).

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

http://host:port/webcenter/portal/portalName/admin/subportals

See Also: Appendix A, "WebCenter Portal Pretty URLs"

7.9.2 Working with Subportals in Portal Administration

To work with the subportals of the current parent portal, see Chapter 5, "Working with Subportals."

7.10 Administering System Pages in a Portal

The System Pages page in portal administration allows you to customize the system pages for a portal. The following sections describe the System Pages page tasks:

- Section 7.10.1, "Accessing System Pages Administration for a Portal"  
- Section 7.10.2, "Working with System Pages in Portal Administration"

7.10.1 Accessing System Pages Administration for a Portal

To access the system pages administration for a portal:

- In the portal administration (see Section 7.1, "Accessing Portal Administration"), click System Pages in the left navigation pane (Figure 7–45).

You can also enter the following URL in your browser to navigate directly to the System Pages page:

http://host:port/webcenter/portal/portalName/admin/systempages
7.10.2 Working with System Pages in Portal Administration

To work with the system pages for a portal, see Chapter 8, "Customizing System Pages for a Portal."

7.11 Administering Device Settings in a Portal

The Device Settings page in portal administration allows you to control how portals render on different kinds of devices including desktop browsers, smart phones, and tablets.

The following sections describe the Device Settings page tasks:

- **Section 7.11.1, "Accessing Device Settings Administration for a Portal"
- **Section 7.11.2, "Working with Device Settings in Portal Administration"

7.11.1 Accessing Device Settings Administration for a Portal

To access the device settings administration for a portal:

- In the portal administration (see Section 7.1, "Accessing Portal Administration"), click Device Settings in the left navigation pane (Figure 7–46).

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

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

**See Also:** Appendix A, "WebCenter Portal Pretty URLs"
Administering Device Settings in Portal Administration

7.11.2 Working with Device Settings in Portal Administration

To work with device settings for a portal, see Chapter 9, "Managing Device Groups for a Portal."
This chapter describes the out-of-the-box system pages available in a portal and how to customize them.

**Note:** Any changes made to a system page at the application level by the system administrator are reflected in the equivalent system page in all portals. For example, if the system administrator adds an image to the application-level **Announcements** system page, that image will display in the portal-level **Announcements** system page in all portals. Also, page variants of system pages for use by device groups can be created only by the system administrator at the application-level, and are exposed in all portals. Changes made to a portal-level system page or page variant are reflected only in the associated portal. When displaying a system page in a portal, WebCenter Portal applies all customizations made at the application level, then customizations made at the portal level.

This chapter includes the following topics:

- **Section 8.1, "About System Pages"
- **Section 8.2, "Customizing System Pages (and Page Variants) in a Portal"
- **Section 8.3, "Removing All Page Customizations from a System Page (or Page Variant)"

**Permissions:** To perform the tasks in this chapter, you need the portal-level permission Manage Security and Configuration or Manage Configuration. A portal moderator has this permission by default.

For more information about permissions, see **Section 29.1, "About Roles and Permissions for a Portal."

### 8.1 About System Pages

System pages are provided out-of-the-box and are designed to fulfill a specific purpose. For example, users who are not logged in when they visit a portal may see the public **Welcome** page.

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

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*Customizing System Pages for a Portal* 8-1
want. They support a rapid deployment of a portal and fulfill a range of needs, from providing an introductory page to pages that provide content that is generated dynamically and tailored to the individual user (the Activity Stream page).

System pages are preconfigured with page access settings that target their anticipated audience. For example, the Welcome page is configured to target the anonymous-role, the Activity Stream page is targeted to individual users, with dynamic content that is tailored to each user. In view of this preconfiguration, you cannot alter the security settings of a system page.

You can, however, customize system pages. Customization enables you to enhance the seeded content of a system page to apply your company brand, add hint text, provide additional functionality (such as task flows and portlets), and so on.

System pages also make task flow customization possible. The system page Task Flow Editor provides an environment for customizing all instances of a seeded task flow in a given scope in one operation. (Custom task flows created through the Assets or Shared Assets page cannot be edited using this page.) Authorized users can add seeded task flows to this page and then customize all instances of the task flow. For more information, see Chapter 10, "Customizing Task Flows for a Portal."

Table 8–1 lists and describes the system pages that are available in a portal out-of-the-box and provides information about the context in which they appear.

<table>
<thead>
<tr>
<th>Page</th>
<th>Description</th>
<th>Context</th>
</tr>
</thead>
<tbody>
<tr>
<td>Activity Stream</td>
<td>For a portal, displays the Publisher task flow and the Activity Stream task flow from the People Connections service. For more information, see the “Tracking Portal Activities” chapter in Using Oracle WebCenter Portal.</td>
<td>Appears by default in the Home portal of every authenticated (logged-in) user. Both application- and portal-level system pages are available.</td>
</tr>
<tr>
<td>Announcements</td>
<td>Displays the Announcement Manager task flow. For more information, see the “Working with Announcements” chapter in Using Oracle WebCenter Portal.</td>
<td>Appears by default in many out-of-the-box portal templates. Both application- and portal-level system pages are available.</td>
</tr>
<tr>
<td>Discussions</td>
<td>Displays the Discussion Forum Manager task flow. For more information, see the “Viewing and Participating in Discussions” chapter in Using Oracle WebCenter Portal.</td>
<td>Appears by default in many out-of-the-box portal templates. Both application- and portal-level system pages are available.</td>
</tr>
<tr>
<td>Documents</td>
<td>Displays the Document Explorer task flow. There are two Documents system pages: for the Home portal, which shows the current user’s personal documents; and one for portals, which shows documents uploaded to that portal. For more information, see the “Creating and Managing Documents” chapter in Using Oracle WebCenter Portal.</td>
<td>Appears by default in many out-of-the-box portal templates. Both application- and portal-level system pages are available.</td>
</tr>
</tbody>
</table>
### Table 8–1  (Cont.) Seeded System Pages in a Portal

<table>
<thead>
<tr>
<th>Page</th>
<th>Description</th>
<th>Context</th>
</tr>
</thead>
<tbody>
<tr>
<td>Events</td>
<td>Displays the Events task flow. For more information, see the &quot;Working with Calendars and Events&quot; chapter in Using Oracle WebCenter Portal.</td>
<td>Appears by default in many out-of-the-box portal templates. Both application- and portal-level system pages are available.</td>
</tr>
<tr>
<td>Lists</td>
<td>Displays the List Manager task flow. For more information, see the &quot;Working with Lists&quot; chapter in Using Oracle WebCenter Portal.</td>
<td>Appears by default in many out-of-the-box portal templates. Both application- and portal-level system pages are available.</td>
</tr>
<tr>
<td>Members</td>
<td>Provides features for managing the members of a portal. For more information, see Chapter 30, &quot;Managing Members and Assigning Roles in a Portal.&quot;</td>
<td>Appears in the default navigation as the Members page in some seeded portal templates. Both application- and portal-level system pages are available.</td>
</tr>
<tr>
<td>No Pages Accessible</td>
<td>Displays a message notifying the user that no pages are accessible.</td>
<td>Appears when users navigate to a portal in which they have no access permissions on the portal’s pages. Both application- and portal-level system pages are available.</td>
</tr>
<tr>
<td>Page Viewer</td>
<td>Displays an external web site (such as google.com) in a portal, surrounded by the page template. For more information, see Section 22.3.3, &quot;Adding Items to a Navigation Model.&quot;</td>
<td>Used when you create a Navigation model that contains an External URL item (with target Same Page). When users click on such links in the navigation, the Page Viewer is used. Both application- and portal-level system pages are available.</td>
</tr>
<tr>
<td>Profile</td>
<td>Displays the current user’s Profile Gallery, which includes subpages for Activity Stream, Connections, Documents, an organization chart (Organization), and the user’s profile details (About). For more information, see the &quot;Managing Your Profile&quot; and &quot;Creating and Managing Documents&quot; chapters in Using Oracle WebCenter Portal.</td>
<td>Appears by default in the Home portal of every authenticated (logged-in) user. Both application- and portal-level system pages are available.</td>
</tr>
<tr>
<td>Resource Viewer</td>
<td>Displays a resource in a portal, surrounded by the page template. For more information, see Section 22.3.3, &quot;Adding Items to a Navigation Model.&quot;</td>
<td>Used when you create a Navigation model that contains a resource item (with target Same Page). When users click on such links in the navigation, the Resource Viewer is used. Both application- and portal-level system pages are available.</td>
</tr>
<tr>
<td>Search</td>
<td>Displays the Search Results page. For more information, see the &quot;About Searching in WebCenter Portal&quot; section in Using Oracle WebCenter Portal.</td>
<td>Renders dynamically to display the results of a search. Both application- and portal-level system pages are available.</td>
</tr>
<tr>
<td>Self-Service Membership</td>
<td>Provides a means of subscribing to a portal that is configured to allow membership by subscription. For more information, see the &quot;Joining a Portal&quot; section in Using Oracle WebCenter Portal.</td>
<td>Appears when users initiate a subscription to a portal. Both application- and portal-level system pages are available.</td>
</tr>
</tbody>
</table>
Customizing System Pages (and Page Variants) in a Portal

You can customize out-of-the-box system pages to bring them in line with your portal's look and feel. You can remove existing components, add new components, and change the page layout. You cannot, however, edit or delete system page input fields and buttons.

If a page variant of a system page for use by a device group has been created by the system administrator at the application level, you can also customize the page variants that are specific to the current portal.

To customize a portal-level system page or page variant:

1. In the portal administration (see Section 7.1, "Accessing Portal Administration"), click System Pages in the left navigation pane (Figure 8–1).

<table>
<thead>
<tr>
<th>Page</th>
<th>Description</th>
<th>Context</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tag Center</td>
<td>Displays the Tag Center task flow. For more information, see the &quot;Using Tags and Bookmarks&quot; chapter in <em>Using Oracle WebCenter Portal</em>.</td>
<td>Appears when users navigate to the Tag Center by one of several methods. Both application- and portal-level system pages are available.</td>
</tr>
<tr>
<td>Task Flow Editor</td>
<td>Provides an environment for customizing all instances of a seeded task flow in a given scope in a single operation. (Custom task flows created through the Assets or Shared Assets page are not supported.) For more information, see Chapter 10, &quot;Customizing Task Flows for a Portal.&quot;</td>
<td>Allows authorized users to add seeded task flows and then customize all instances of those task flows. Both application- and portal-level system pages are available.</td>
</tr>
<tr>
<td>Task Flow Viewer</td>
<td>Displays a task flow in a portal, surrounded by the page template. For more information, see Section 22.3.3, “Adding Items to a Navigation Model.”</td>
<td>Used when you create a Navigation model that contains a task flow item (with target Same Page). When users click on such links in the navigation, the Task Flow Viewer is used. Both application- and portal-level system pages are available.</td>
</tr>
<tr>
<td>Unauthorized</td>
<td>Displays a message notifying users that they are not authorized to access a portal or a page.</td>
<td>Appears when users navigate to a portal or a page on which they do not have access permission. Both application- and portal-level system pages are available.</td>
</tr>
<tr>
<td>Unavailable</td>
<td>Displays a message notifying users that the portal is not available.</td>
<td>Appears when users navigate to a portal that is offline. Both application- and portal-level system pages are available.</td>
</tr>
<tr>
<td>User Profile</td>
<td>Displays the Profile Gallery of a user other than the current user, which, by default, displays the same subpages and task flows as the current user's Profile Gallery. It differs in that it displays information associated with the other users.</td>
<td>Renders dynamically when the current user accesses another user's profile. Both application- and portal-level system pages are available.</td>
</tr>
</tbody>
</table>
You can also enter the following URL in your browser to navigate directly to the System Pages page:

http://host:port/webcenter/portal/portalName/admin/systempages

See Also: Appendix A, “WebCenter Portal Pretty URLs”

Figure 8–1 Portal Administration: Customizing System Pages

2. Click the Customize link next to the system page to open it in Composer (Figure 8–1).

3. To customize a variant of a system page for a device group (created by the system administrator at the application level), expand the system page variant icon, then click Customize for the device group you want to customize (Figure 8–2).

Figure 8–2 Customizing a System Page Variant for a Device Group

4. Customize and save the page.

See Also: Section 12.4, "Editing a Page"

8.3 Removing All Page Customizations from a System Page (or Page Variant)

You can return a system page or page variant to its default, out-of-the-box state, removing all page customizations.
Removing All Page Customizations from a System Page (or Page Variant)

To remove all customizations from a system page or page variant:

1. In the portal administration (see Section 7.1, "Accessing Portal Administration"), click System Pages in the left navigation pane (Figure 8–3).

You can also enter the following URL in your browser to navigate directly to the System Pages page:

http://host:port/webcenter/portal/portalName/admin/systempages

See Also: Appendix A, "WebCenter Portal Pretty URLs"

Figure 8–3 Portal Administration: Restoring Default System Pages

<table>
<thead>
<tr>
<th>Name</th>
<th>Variants</th>
<th>Last Modified</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Activity Stream</td>
<td></td>
<td>Modified by system 1:00 AM 12:00 AM</td>
<td>Customize</td>
</tr>
<tr>
<td>Announcements</td>
<td></td>
<td>Modified by system 1:00 PM 7:00 PM</td>
<td>Customize</td>
</tr>
<tr>
<td>Documents</td>
<td></td>
<td>Modified by system 1:00 AM 12:00 AM</td>
<td>Customize</td>
</tr>
<tr>
<td>Events</td>
<td></td>
<td>Modified by system 1:00 PM 7:00 PM</td>
<td>Customize</td>
</tr>
</tbody>
</table>

2. Click the Restore Default link next to the system page or page variant.

3. In the resulting confirmation dialog, click Restore.

All customizations are permanently removed from the selected system page or page variant.
Managing Device Groups for a Portal

This chapter describes how to manage devices settings in a portal. Device settings allow you to control how portals render on different kinds of devices including desktop browsers, smart phones, and tablets.

This chapter includes the following topics:

- Section 9.1, "About Device Settings"
- Section 9.2, "Accessing Device Settings in a Portal"
- Section 9.3, "Managing Device Groups"

Permissions: To perform the tasks in this chapter, you need the portal-level permission Manage Security and Configuration or Manage Configuration. A portal moderator has this permission by default.

For more information about permissions, see Section 29.1, "About Roles and Permissions for a Portal."

9.1 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 allow you to control exactly how your portal pages render on different devices. As a portal moderator, you may be asked to support a new type of device or to change or improve the way portal pages render on certain devices.

WebCenter Portal includes the capability to recognize which type of device a given request comes from, and to render the portal properly on that device. As moderator, you use device settings to specify which page templates and skins to associate with specific devices or classes of devices.

As portal moderator, you have permission to edit existing device groups and change the page template and/or skin associated with them. By changing the page template or skin, you change how pages are rendered on specific devices for your portal. In addition, you can create and edit page variants—alternative pages designed to display on specific groups of devices. As portal moderator, your changes override device group settings made by the portal administrator, but only for your portal.

It is important to understand the following concepts to successfully work with device settings:

- Device groups
- Devices
Default device group
- Page variants
- Fallback page

For a detailed introduction to these concepts, see the section "About Device Settings" in Administering Oracle WebCenter Portal.

As a portal moderator, you can manage these device group settings for your portal:
- Page template and skin used by the device group
- Whether the device group is hidden or shown
- The default device group
- The order of precedence of device groups

Out-of-the-box, WebCenter Portal provides several page templates that are designed to render well on general classes of devices, such as smart phones, tablets, or desktop browsers. You can choose to use these templates as they are, modify them to suit your needs, or create new ones.

9.2 Accessing Device Settings in a Portal

To access device settings in a portal:
- In the portal administration (see Section 7.1, "Accessing Portal Administration"), click Device Settings in the left navigation pane (Figure 9–1.).

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

http://host:port/webcenter/portal/builder/portals/admin/PortalName/device

See Also: Appendix A, "WebCenter Portal Pretty URLs"

Figure 9–1  Device Group Page in Device Settings
9.3 Managing Device Groups

A device group represents a collection of devices that share similar display requirements. This section explains how to manage device groups for the portals you moderate:

- **Section 9.3.1, "Editing a Device Group"**
- **Section 9.3.2, "Showing and Hiding Device Groups"**
- **Section 9.3.3, "Setting a Default Device Group"**
- **Section 9.3.4, "Filtering Device Groups"**
- **Section 9.3.5, "Ordering Device Groups"**

### 9.3.1 Editing a Device Group

You can change the skin and/or template associated with a device group.

To edit the basic details of a device group:

1. On the **Device Settings** page (see **Section 9.2, "Accessing Device Settings in a Portal"**), select the device group you wish to edit.
2. Select **Edit** from the **Actions** menu.
3. In the **Assets** section, select the page template and skin that you want this device group to use.

**Note:** An Expression Editor is available for entering custom values using Expression Language (EL) expression, allowing a skin or page template to be selected dynamically. Click the ▼ icon next to an asset, then select to open the editor. If you need EL assistance, an application developer can provide an EL expression; see the "Expression Language Expressions" appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

4. Click **Save**.
5. Click **Close** to close the Edit Device Group page.

### 9.3.2 Showing and Hiding Device Groups

All device groups, whether built-in or custom, can be marked as hidden or available. A check mark next to a device group’s name indicates that the device group is available to use. An empty check box indicates that the device group is not available for use in portals (**Figure 9–2**). This setting also controls the available selections when you create page variants. If a device group is hidden, it does not show up as an option to use with a new page variant, and you can’t create a page variant with that group. The show/hide settings are inherited from the Portal Administration settings; however, they can be overridden at the portal level by a portal moderator. See also **Section 12.3, "Creating a Page Variant for a Device Group."**
9.3.2.1 Showing a Device Group
You make a device group available for use in your portals by marking it as shown.

To make a device group as available:
- On the Device Settings page (see Section 9.2, "Accessing Device Settings in a Portal"), select the Available checkbox that corresponds to the device group you wish to show.

9.3.2.2 Hiding a Device Group
You can choose to hide a device group to prevent portal creators from seeing and selecting it. To hide a device group:
- On the Device Settings page (see Section 9.2, "Accessing Device Settings in a Portal"), deselect the Available checkbox that corresponds to the device group you wish to hide.

9.3.3 Setting a Default Device Group
The built-in device group named Desktop Browsers is the default device group in WebCenter Portal. All new pages that you create are automatically associated with the default device group.

In the Device Groups table, Default appears next to the device group that is set as default.

To set a device group as default:
- On the Device Settings page (see Section 9.2, "Accessing Device Settings in a Portal"), select the device group that you want to specify as default, and then click Set as Default from the Actions menu.

Notice that Default now appears next to the selected device group.
9.3.4 Filtering Device Groups

The Filter field lets you filter the list of device groups shown in the Device Group table. Filter searches on device group names, display names, and descriptions.

9.3.5 Ordering Device Groups

When a user accesses WebCenter Portal using a device, portals are rendered using the assets such as page template and skin associated with the device group to which that device belongs. However, a device may be associated with multiple device groups. In such cases, the ordering of the device groups in the Device Groups tab determines the precedence of device groups.

To define the order of the device groups:

- On the Device Settings page (see Section 9.2, "Accessing Device Settings in a Portal"), use the ordering icons to define the order of the device groups (Figure 9–3):
  - **Move to top**: Click to move the selected device group to the top in the list of device groups displayed.
    This implies that if a device belongs to more than one device group, then the topmost device group must take precedence.
  - **Move up**: Click to move the selected device group one level up in the list of device groups displayed.
  - **Move down**: Click to move the selected device group one level down in the list of device groups displayed.
  - **Move to bottom**: Click to move the selected device group to the end in the list of device groups displayed.

![Figure 9–3  Reordering Device Groups](image)
10

Customizing Task Flows for a Portal

This chapter describes how to use the Task Flow Editor system page to customize task flows for a portal.

Note: Task flow customization is also possible at design time through Oracle JDeveloper. The process differs significantly from the runtime procedure discussed in this chapter. For more information, see the "Customizing WebCenter Portal Tools and Services Task Flows" chapter in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

This chapter includes the following topics:

- Section 10.1, "About Task Flow Customization for a Portal"
- Section 10.2, "Customizing Task Flows for a Portal"
- Section 10.3, "Removing Task Flow Customizations"

Permissions: To perform the tasks in this chapter, you need the portal-level permission Manage Security and Configuration or Manage Configuration. A portal moderator has this permission by default.

For more information about permissions, see Section 29.1, "About Roles and Permissions for a Portal."

10.1 About Task Flow Customization for a Portal

Task flow customization provides a means of configuring a particular task flow in a way that all instances of that task flow within the current scope are affected. For example, you can add a link or icon to a task flow that requires it in a particular portal.

The task flow customization feature is available exclusively on the Task Flow Editor system page. The Task Flow Editor system page is available for both the application (all portals) and for individual portals:

- To change all instances of a given task flow across all portals (including the Home portal), the system administrator can customize the task flow on the application-level Task Flow Editor system page, as described in the "Customizing Task Flows Across Portals" chapter in Administering Oracle WebCenter Portal.
To change only those instances exposed in a given portal, customize the task flow on the portal-level **Task Flow Editor** system page, as described in this chapter.

---

**Note:** When you customize a task flow element at the application level, and another user customizes the same task flow element at the portal level, the portal-level customization take precedence in that portal.

The **Task Flow Editor** system page is provided to enable customization of any out-of-the-box task flow. Custom task flows that are created through the **Assets** or **Shared Assets** page cannot be customized in this way.

System pages have a Restore Default feature that enables authorized users to remove all page customizations and restore a system page to its out-of-the-box state. It is important to note that Restore Default does not also restore customized task flows to their default states. A separate control, Reset Task Flow, is available to remove task flow customizations.

**See Also:** For information about the Restore Default and Reset Task Flow features for system pages, see Section 8.3, "Removing All Page Customizations from a System Page (or Page Variant)" and Section 10.3, "Removing Task Flow Customizations", respectively.

## 10.2 Customizing Task Flows for a Portal

This section describes how to perform task flow customizations at the portal level.

---

**Note:** When a system administrator customizes a task flow element at the application level, then you customize the same task flow element at the portal level, the portal-level customization take precedence in that portal.

To perform portal-wide task flow customizations through the **Task Flow Editor** system page:

1. In the portal administration (see Section 7.1, "Accessing Portal Administration"), click **System Pages** in the left navigation pane.

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

   ```plaintext
   http://host:port/webcenter/portal/portalName/admin/systempages
   ```

   **See Also:** Appendix A, "WebCenter Portal Pretty URLs"

2. Click the **Customize** link next to the **Task Flow Editor** system page (Figure 10–1) to open it in the page editor (Composer).
3. Add a task flow that you want to edit to the Task Flow Editor page.

The method for adding a task flow to a page is that same as for any other component in the resource catalog. For more information, see Section 14.2, "Adding a Component to a Page."

4. Click the Structure tab to view the page source (Figure 10–2).

5. Click the Edit Task Flow link next to the task flow you want to customize (Figure 10–2).

6. In the Confirm Task Flow Edit dialog, click Edit.

Structure view zooms into the source code hierarchy of the task flow being edited (Figure 10–3).
7. Set the properties of a task flow element by clicking it in the Task Flow Editor, then click the **Show the properties of region** icon. Alternatively, right-click the **region** and select **Edit** (Figure 10–4).
The Component Properties dialog opens (Figure 10–5). Click the Help icon for descriptions of the parameters for the component you are editing.

8. Make your changes to the element’s properties.
10.3 Removing Task Flow Customizations

You can remove all customizations made to seeded task flows in the current portal.

**Note:** This procedure does not apply to task flows created at runtime. That is, task flows created through the Assets or Shared Assets pages. Changes made to a task flow created at runtime are base edits rather than layered customizations; therefore, when you click Reset Task Flow, there are no customization layers to remove.

To remove task flow customizations made at the portal level:

1. In the portal administration (see Section 7.1, "Accessing Portal Administration"), click System Pages in the left navigation pane.
   
   You can also enter the following URL in your browser to navigate directly to the System Pages page:
   
   http://host:port/webcenter/portal/portalName/admin/systempages
   
   **See Also:** Appendix A, "WebCenter Portal Pretty URLs"

2. Click the Customize link next to the Task Flow Editor system page (Figure 10–6) to open it in the page editor (Composer).

![Figure 10–6 Custom Link Next to the Task Flow Editor System Page](image)

3. Click the Structure tab to view the page source, select the customized task flow.

4. In the toolbar, click Reset Task Flow (Figure 10–7).
5. In the Reset Task Flow dialog, click **Reset Task Flow** to confirm the action.
This chapter describes how to add a Portal Browser task flow to a page, and how to work with the task flow.

This chapter includes the following topics:

- Section 11.1, "About the Portal Browser Task Flow"
- Section 11.2, "Adding a Portal Browser Task Flow to a Page"
- Section 11.3, "Setting Portal Browser Task Flow Properties"

Permissions: To perform the tasks in this chapter, you need the portal-level permission Basic Services: Edit Page Access, Structure, and Content (standard permissions) or Pages: Edit Pages (advanced permissions). A portal moderator has this permission by default.

For more information about permissions, see Section 29.1, "About Roles and Permissions for a Portal."

11.1 About the Portal Browser Task Flow

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

- **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 Chapter 31, "Working with the Portal Members Task Flow."

- **Portal Browser** task flow (Figure 11–1): Adds an area that operates identically to the Portals page (portal browser) in the Home portal, providing users with the ability to work with their portals on the page, rather than navigating to the Portals page. For information about working with this task flow, see the "Viewing and Accessing Available Portals" section in Using Oracle WebCenter Portal.
11.2 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 Section 14.2, "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 Section 23.5.1, "Adding a Resource to a Resource Catalog" (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 Section 7.3.5, "Changing the Resource Catalogs for Pages and the Page Template for a Portal."

11.3 Setting Portal Browser Task Flow Properties

The Portal Browser task flow has associated properties, which users with sufficient privileges can access through the Component Properties dialog in Composer (Figure 11–2).
For information about accessing the Component Properties dialog, see Section 14.3, "Modifying Component Properties."

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

- Section 11.3.1, "About the Portal Browser Task Flow Properties"
- Section 11.3.2, "Portal Browser Task Flow Parameters"

### 11.3.1 About the Portal Browser Task Flow Properties

The properties on the Parameters tab of the Component Properties dialog control the default task flow content. For descriptions of the parameters on this tab, see Section 11.3.2, "Portal Browser Task Flow Parameters." For some task flows, parameters on this tab facilitate the wiring of the task flow to page parameters and page definition variables. For more information, see Chapter 19, "Wiring Pages, Task Flows, Portlets, and ADF Components."

Changes to the properties on the Display Options, Style, and Content Style tabs affect the appearance and behavior of the task flow for all users. These properties are common to all task flows. For more information, see Section 14.3.4, "Working with Component Display Options" and Section 14.3.6, "Working with Style and Content Style Properties."

The contents of the Events tab depend on the events supported by the task flow. For more information, see Section 14.3.7, "Working with Component Contextual Events."

All properties on the Parameters and Display Options tabs provide access to an Expression Language (EL) editor, which you can use to select or specify a variable.
value instead of a constant value. Click the ▼ icon next to a property, then select **Expression Builder** to open the editor.

---

**Note:** When you enter EL in the generic **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 14–1, “Display Options Properties”**.

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

---

If you need EL assistance, an application developer can provide an EL expression; see the "Expression Language Expressions" appendix in *Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper*.

### 11.3.2 Portal Browser Task Flow Parameters

**Table 11–1** describes the parameters that are unique to the Portal Browser task flow.
### Table 11–1  Portal Browser Task Flow Properties: Parameters Tab

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
</table>
| 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 display all subportals of a named parent portal:  
    spaceContext.spacesQuery.parentSpaceName['parent_portal_name']  
    or  
    spaceContext.spacesQuery.parentSpaceName['parent_portal_guid']  
  - To display top-level subportals of a named parent portal:  
    spaceContext.spacesQuery.parentSpaceName['parent_portal_guid'].shape['ROOT_LEVEL']  
  - 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.discoverable'] ['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.displayName']['=' ]['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 the "Expression Language Expressions" appendix in *Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper* 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. |
### Table 11–1 (Cont.) Portal Browser Task Flow Properties: Parameters Tab

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Display View</strong></td>
<td>Specifies the type of layout in which to display portals in the Portal Browser.</td>
</tr>
<tr>
<td></td>
<td>■ Card Layout: Display portals in a card view.</td>
</tr>
<tr>
<td></td>
<td>■ Tiled Layout (default): Display portals in a tiled view.</td>
</tr>
<tr>
<td><strong>Filter</strong></td>
<td>Specifies which portals should display in the Portal Browser task flow.</td>
</tr>
<tr>
<td></td>
<td>■ Show All (default)</td>
</tr>
<tr>
<td></td>
<td>■ Show Joined</td>
</tr>
<tr>
<td></td>
<td>■ Show Moderated</td>
</tr>
<tr>
<td></td>
<td>■ Show Public</td>
</tr>
<tr>
<td></td>
<td>■ Show Discoverable (all Public and Private portals)</td>
</tr>
<tr>
<td><strong>Note</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Portal Launched on Selection</strong></td>
<td>Specifies whether to navigate to a portal when selected in the Portal Browser task flow:</td>
</tr>
<tr>
<td></td>
<td>■ #{true} (default): Clicking a portal opens the portal on the Home page.</td>
</tr>
<tr>
<td></td>
<td>■ #{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.</td>
</tr>
</tbody>
</table>
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.

- Chapter 12, "Creating and Editing a Portal Page"
- Chapter 13, "Managing a Portal Page"
- Chapter 14, "Working with Resource Catalog Components on a Page"
- Chapter 15, "Working with Web Development Components on a Page"
- Chapter 16, "Working with Layout Components on a Page"
- Chapter 17, "Working with OmniPortlet"
- Chapter 18, "Working with the Web Clipping Portlet"
- Chapter 19, "Wiring Pages, Task Flows, Portlets, and ADF Components"
Creating and Editing a Portal Page

This chapter describes how to create and edit portal pages, subpages, and page variants.

For conceptual information about the different types of pages in WebCenter Portal, see Section 1.3.7, "What Are Pages?"

This chapter includes the following topics:

- Section 12.1, "Viewing the Pages and Page Variants in a Portal"
- Section 12.2, "Creating Pages or Subpages in a Portal"
- Section 12.3, "Creating a Page Variant for a Device Group"
- Section 12.4, "Editing a Page"
- Section 12.5, "Personalizing Pages"

Permissions: To work with pages in the portal editor, you need the following portal-level permissions:

- 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.

- Assets: Edit Assets (standard permissions) or Navigations: Edit Navigations (advanced permissions) as adding or deleting pages changes the portal navigation.

Portal moderators have these permissions by default.

Note that when a role's portal page permissions are added or revoked, WebCenter Portal does not automatically add or revoke permission to edit portal navigation for the users assigned to that role. Page and assets permissions must be explicitly added or revoked.

For more information about permissions, see Section 29.1, "About Roles and Permissions for a Portal."
12.1 Viewing the Pages and Page Variants in a Portal

You can view all pages in a portal, preview what a page will look like on various devices (such as smartphones, tablets, and desktop browsers) in a selected device group, or filter the listing by device group:

- Section 12.1.1, "Accessing the Pages in a Portal"
- Section 12.1.2, "Previewing a Page Variant for a Device"
- Section 12.1.3, "Filtering a Portal Page Listing by Device Group"

12.1.1 Accessing the Pages in a Portal

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

- In the portal editor. If you have permissions to edit the portal, see Section 6.2, "Accessing Pages in the Portal Editor."
- In portal administration. If you have permissions to administer the portal, see Section 7.4.1, "Accessing Pages Administration for a Portal."
- On the Personalize Pages page (Figure 12–1). This page lists all the pages in the portal as a flat listing. To view the page hierarchy (pages and their subpages), view the Pages page in the portal editor or portal administration.

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 when viewing the portal.

![Personalize Pages for a Portal](Image)

12.1.2 Previewing a Page Variant for a Device

If you want to preview what a page will look like on a device (such as smartphones, tablets, and desktop browsers) before and after creating a page variant, you can do so on the Pages page in the portal editor. Even if you are building a portal for a desktop browser, this gives you an idea of what the pages might look like on other devices. This preview is useful for determining the edits required to optimize a page variant for a particular device.
To preview how a page will look on a selected device:

1. In the portal editor or portal administration, open the Pages page.

See Also: Section 6.2, "Accessing Pages in the Portal Editor" or Section 7.4.1, "Accessing Pages Administration for a Portal"

2. Select the page that you want to preview.

3. In the page selection pane, from the Preview list, select a device for which to preview the selected page (Figure 12–2).
4. In the Preview view (Figure 12–3), select from the Device and Orientation dropdown lists to preview the page on other devices.
12.1.3 Filtering a Portal 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 on the Pages page.
To view pages for a particular device group:

1. In the portal editor or portal administration, open the Pages page.

See Also:  
- Section 7.3.6, "Setting Page Behavior for a Portal When No Page Variant Exists"  
- Chapter 9, "Managing Device Groups for a Portal"  
- Section 12.1.2, "Previewing a Page Variant for a Device"  
- Section 12.3, "Creating a Page Variant for a Device Group"  
- Section 13.10, "Setting Page Behavior for a Specific Page When No Page Variant Exists"

At the application-level, your system administrator performs the following tasks described in Administering Oracle WebCenter Portal:

- Configures device group settings, as described in the "Administering Device Settings” chapter
- Creates page variants for system pages, as described in the "Creating a Page Variant of a System Page for Device Groups" section

To view pages for a particular device group:

2. In the page selection pane, from the Filter list, select the device group for which you want to view associated pages (Figure 12–4).

Figure 12–4  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 (see Section 7.3.6, "Setting Page Behavior for a Portal When No Page Variant Exists") or the portal level (Section 13.10, "Setting Page Behavior for a Specific Page When No Page Variant Exists"), it will not be shown in the navigation when you filter by that device group.
12.2 Creating Pages or Subpages in a Portal

You can create new pages or subpages in a portal either when creating a new portal, or by editing an existing portal, as described in the following sections:

- Section 12.2.1, "Creating Pages or Subpages When Creating a New Portal"
- Section 12.2.2, "Creating a Page or Subpage in an Existing Portal"

Permissions: To create a new page in a portal, you need the following portal-level permissions:

- Basic Services: Edit Page Access, Structure, and Content (standard permissions) or Pages: Create, Edit, and Delete Pages (advanced permissions).
- Assets: Edit Assets (standard permissions) or Navigations: Edit Navigations (advanced permissions). As adding pages changes the portal navigation.

With Manage Security and Configuration or Manage Configuration permission in the portal, you can also create new pages from the Pages page in portal administration, as described in Section 7.4.2, "Working with Portal Pages (from Portal Administration)."

Portal moderators have these permissions by default.

Note that when a role's portal page permissions are added or revoked, WebCenter Portal does not automatically add or revoke permission to edit portal navigation for the users assigned to that role. Page and assets permissions must be explicitly added or revoked.

For more information about permissions, see Section 29.1, "About Roles and Permissions for a Portal."

12.2.1 Creating Pages or Subpages When Creating a New Portal

You can quickly create pages and subpages for a new portal during the process of creating the portal, using a special syntax in the Create Portal wizard. For information about this method of creating pages, see Section 2.3, "Creating Pages When Creating a New Portal."

12.2.2 Creating a Page or Subpage in an Existing Portal

To create a new page or subpage in an existing portal:

1. Open the Create Page wizard in any of the following ways:
   - On the Home page of the portal, click Create Page.
     
     Tip: The location of the Create Page link depends on the page template in use. For example, in a side navigation template, you may access it through an Actions menu. You can also find it on the Personalize Pages page.
   - In the portal editor or portal administration, on the Pages page, click the Add icon, and select New Page or New Subpage (Figure 12–5).
2. On the Select a Style page (Figure 12–6), 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.

See Also: Section 25.1, "About Page Styles"
The **Page Information** page (Figure 12–7) opens.

### Figure 12–7 Create Page Wizard: Page Information

The **Page Information** page appears when users visit the page. The title and description are searchable and appear in search results. Keywords are used for search only.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>New Page</td>
</tr>
<tr>
<td>Description</td>
<td></td>
</tr>
<tr>
<td>Keywords</td>
<td>Tip: Enter multiple keywords separated by commas.</td>
</tr>
</tbody>
</table>

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.
Creating Pages or Subpages in a Portal

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, Announcements, Discussions, Documents).

- While there are restrictions on naming files (including wiki documents), there are no naming restrictions for page names. Thus, while any of the following characters can be used to name a wiki page, the page title will include the character(s) but the associated wiki document will replace the illegal character with _.

  ? # & \ / * " < > : ^
  For example, if you create a wiki page named "What’s In a Name?", the page will have this title, but the associated wiki document will be named _What’s In a Name_.

4. Click Create to create the page with existing default parameter and security settings, or click Next to open the Settings page (Figure 12–8).

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.

Figure 12–8  Create Page Wizard: Settings

- PHILATELISTS > Edit
- Pages Assets Members
- View Portal | Administrator Portal

Settings
The following information must be provided in order to create the page.

Left Width: 35%
Center Width: 35%
Right Width: 0%
Show Header: false
Show Footer: false

5. Optionally, modify the default values of the out-of-the-box page parameters.
If you selected the Blank, Home Page, Left Narrow, Right Narrow, or Three Column page style, you will see the following out-of-the-box parameters with default values:

**Note:** In non-English versions of WebCenter Portal, these parameters will always display in English due to underlying source code requirements.

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Left Width</td>
<td>Use to adjust the width of page columns. Depending on the layout you choose, each page column is assigned a default width (0% in some cases). You can modify the percentage of width allotted to each column. Note that the width values that you enter are fixed values. That is, they do not expand should you add content that exceeds the stated width. See Section 13.12, &quot;Adjusting the Widths of Page Columns.&quot;</td>
</tr>
<tr>
<td>Center Width</td>
<td></td>
</tr>
<tr>
<td>Right Width</td>
<td></td>
</tr>
<tr>
<td>Show Header</td>
<td>Use to display (true) or hide (false) a page footer and header. Both of these content areas are immune to user customizations, preventing them from being dragged to a new position or otherwise altered in page view mode. You can edit the page to add content as desired to the page header and footer. See Section 13.13, &quot;Adding a Page Header and Footer.&quot;</td>
</tr>
<tr>
<td>Show Footer</td>
<td></td>
</tr>
</tbody>
</table>

6. Click **Create** to create the page with existing default security settings, or click **Next** to open the **Access** page (Figure 12–9).

**Figure 12–9** *Create Page Wizard: Access*

![Create Page Wizard: Access](image)

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

Access Method:  Override Security  Inherit Parent Security

<table>
<thead>
<tr>
<th>Role or User</th>
<th>Access</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Grant</td>
<td>Create</td>
<td>Delete</td>
<td>Edit</td>
</tr>
</tbody>
</table>

7. Modify the access to the page. For more information, see Section 13.15, "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 on the **Security** tab of the **Pages** page, as described Section 13.15, "Setting Page Security."

8. Click **Create**.
The new page is created and automatically added to the portal navigation. You can edit (see Section 12.4, "Editing a Page") or manage (see Chapter 13, "Managing a Portal Page") it as required.

**Note:** If you do not see the new page in the portal navigation, verify with the portal moderator that you are granted the Assets: Edit Assets (standard permissions) or Navigations: Edit Navigations (advanced permissions) permission to ensure that pages you create are added to the portal navigation.

For more information about permissions, see Section 29.1, "About Roles and Permissions for a Portal.”

### 12.3 Creating a Page Variant for a Device Group

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.

Page variants can be created for the Home page and user-created pages in a portal. When a page variant is created 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 page as specified in Section 7.3.6, "Setting Page Behavior for a Portal When No Page Variant Exists.”

Any changes you make to the page information, security, or parameters of base page are reflected in the page variant. The page variant does not include the **Summary**, **Security**, **Parameters**, and **Advanced** tabs that allow you to edit this information. However, any subsequent changes to the content of the base page are not reflected in the variant page(s), and vice versa.

See Also:
- Section 7.3.6, "Setting Page Behavior for a Portal When No Page Variant Exists"
- Chapter 9, "Managing Device Groups for a Portal"
- Section 12.1.2, "Previewing a Page Variant for a Device"
- Section 12.1.3, "Filtering a Portal Page Listing by Device Group"
- Section 13.10, "Setting Page Behavior for a Specific Page When No Page Variant Exists"

At the application-level, your system administrator performs the following tasks described in *Administering Oracle WebCenter Portal*:

- Configures device group settings, as described in the "Administering Devices and Device Groups" chapter
- Creates page variants for system pages, as described in the "Creating a Page Variant for System Pages" section

To create a page variant for a device group:

1. In the portal editor or portal administration, open the **Pages** page.
2. If you want to preview what page looks like for a particular device group before creating the page variant, see Section 12.1.2, "Previewing a Page Variant for a Device."

3. In the selection pane, select the page for which you want to create a page variant.

4. Click the Add icon, and select New Page Variant (Figure 12–10).

5. Select the Device Group and Page Content and Style (Figure 12–11):
   - 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.

See Also: Section 6.2, "Accessing Pages in the Portal Editor" or Section 7.4.1, "Accessing Pages Administration for a Portal"
6. Click Create.

The new page variant is created and the base page exposes it in the portal navigation (Figure 12–12).

Any changes you make to the page information, security, or parameters of base page are reflected in the page variant. The page variant does not include the Summary, Security, Parameters, and Advanced tabs that allow you to edit this information. However, any subsequent changes to the content of the base page are not reflected in the variant page(s), and vice versa.
7. To list only those pages for a particular device group, see Section 12.1.3, "Filtering a Portal Page Listing by Device Group."

8. Select, edit, and manage page variants as you would any other page (see Section 12.4, "Editing a Page" and Chapter 13, "Managing a Portal Page").

12.4 Editing a Page

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

---

**Note:** If your portal is based on a portal (space) template from a release prior to WebCenter Portal release 11.1.1.8.0 and you have not upgraded it to release 11.1.1.8.0 or later (for example, if you simply imported a space from a pre-11.1.1.8.0 release), you will see a view similar to Figure 6–7. Note that there is no support for hierarchical pages (subpages), page variants, or device preview, and the portal administration does not include a **Device Settings** page. Refer to the WebCenter Portal Documentation on OTN for working with a page in a space for the pre-11.1.1.8.0 release at [http://www.oracle.com/technetwork/middleware/webcenter/portal/documentation/index.html](http://www.oracle.com/technetwork/middleware/webcenter/portal/documentation/index.html).

If your portal is based on a portal template from WebCenter Portal release 1.1.1.8.0 or later, either an out-of-the-box template (see Table 3–1, "Out-of-the-Box Portal Templates and Categories") or a custom template, continue with the steps in this section.

This section provides an overview of Composer and describes how to perform editorial tasks:

- Section 12.4.1, "About the Page Editor (Composer)"
- Section 12.4.2, "About Concurrent Users in Composer"
- Section 12.4.3, "Opening a Page in the Page Editor (Composer)"
- Section 12.4.4, "Providing Page Background Color, Image, and CSS Encoding"
- Section 12.4.5, "Adding New Content Regions"
12.4.1 About the Page Editor (Composer)

With the view switcher set to Web, the portal editor displays the page editor, Composer. In Composer, you can edit the Home page and any user-created pages in a portal. Other resources added to the portal navigation (see Section 22.3.3, "Adding Items to a Navigation Model") are not editable in Composer (Figure 12–13).

Figure 12–13  Editable Pages in Portal Navigation

The following sections describe the tabbed views where you will edit your pages in Composer:

- Section 12.4.1.1, "About Design View in Composer"
- Section 12.4.1.2, "About Select View in Composer"
- Section 12.4.1.3, "About Structure View in Composer"
- Section 12.4.1.4, "About Preview View in Composer"

12.4.1.1 About Design View in Composer

Design view is the default view when you open a page in the page editor (Composer). It provides a WYSIWYG rendering of the page and its content, where controls are
directly selectable on each component to move, delete, or view the properties of the component. For more information, see:

- Section 14.2.1, "Adding a Component to a Page in Design View"
- Section 14.3.2.1, "Setting Component Properties in Design View"
- Section 14.4.1, "Deleting a Component in Design View"

You cannot select a component in Design view to target the location of new components; this action is available in Select view.

The resource catalog displays inline on the right side of the page, where you can select components to add to the page (Figure 12–14) using drag-and-drop or by clicking the Add link next to a component. You can choose to hide the inline resource catalog in Design view, and instead show each area of the page with an Add Content button to identify the layout containers (such as a Box or Movable Box components) to target the location of new components. If you hide the inline resource catalog, clicking Add Content displays a standalone resource catalog, which does not support drag-and-drop.

Figure 12–14 Design View of Composer (showing page hierarchy and page variant)

12.4.1.2 About Select View in Composer

Select view provides a WYSIWYG rendering of the page and its content, where you can select a component for quick access to its properties or the properties of its parent component, and target the location of new components added to a page. For more information, see:

- Section 14.2.2, "Adding a Component to a Page in Select View"
- Section 14.3.2.2, "Setting Component Properties in Select View"

You cannot delete or move a component in Select view; these actions are available in Design view.

Just like Design view, the resource catalog displays inline on the right side of the page, where you can select components to add to the page (Figure 12–15). You can choose to
hide the inline resource catalog, but unlike Design view, Select view does not display Add Content buttons when you hide the inline resource catalog.

**Tip:** To target the location of new components in Select view, as Add Content buttons do in Design view, you can select an existing layout container (such as a Box or Movable Box component) in Select view, then click Add next to a component in the resource catalog to add the component inside the selected layout container.

**Figure 12–15  Select View of Page Edit Mode**

![Select View of Page Edit Mode](image)

12.4.1.3 About Structure View in Composer

Structure view provides a combined WYSIWYG and hierarchical rendering of page components, where controls are available in the toolbar of the page structure pane (Figure 12–16) to add, edit properties of, delete, cut, and paste page components. Additionally, you can collapse and expand the component hierarchy in the structure pane. For more information, see:

- Section 14.2.3, "Adding a Component to a Page in Structure View"
- Section 14.3.2.3, "Setting Component Properties in Structure View"
- Section 14.4.2, "Deleting a Component in Structure View"
The component navigator provides access to page layout components in a tree structure and enables you to select and modify components that are otherwise not exposed on the page. For examples, see Chapter 16, "Working with Layout Components on a 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 (Figure 12–17). 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 12–16  Structure View of Page Edit Mode**

![Structure View of Page Edit Mode](image)

**Figure 12–17  Mouse Cursor as Magnifying Glass**

![Mouse Cursor as Magnifying Glass](image)

**Note:** You can edit core ADF Faces components, task flows, and declarative components only in Structure view of the page.
When your page structure includes a task flow, you will see an **Edit Task Flow** link next to the task flow in the structure pane, which allows you to zoom into the task flow and edit it like you would edit any customizable page. You can add components, edit component properties, delete components, and resequence table columns on the task flow’s page. A **Close** link zooms back out to the full page hierarchy view. For more information, see Chapter 10, "Customizing Task Flows for a Portal."

Similarly, an **Edit** link or a **Close** link next to a declarative component enables you to zoom in and out of the declarative component’s page and edit components inside it.

### 12.4.1.4 About Preview View in Composer

*Preview view* displays a preview of the published page, as it will appear in your portal.

### 12.4.2 About Concurrent Users in Composer

Because users access a portal from the Web, multiple users may attempt to edit the same page at the same time. In such cases, a concurrency warning displays in Composer that alerts each user to the others (Figure 12–18).

*Figure 12–18  A Concurrency Warning in Composer*

The final state of the page is determined by the last user to save. That is, the last changes saved overwrite the changes made by other concurrent users.

**Tip:** Time duration is added to the concurrency message only when the first or a subsequent concurrent user has made (but not yet saved) a page customization.

WebCenter Portal does not support single-user concurrency. That is, one user cannot create multiple, simultaneous sessions.

Because concurrent page editing by multiple users is supported, there may be occasions when one user deletes a page that another user is editing. In such cases, the user performing the edits sees an error message with each action. For example, a message saying the user does not have permission to edit the page may appear. When
the user tries to save changes, a Page Not Found error appears with a link redirecting the user to the Home page. The error message may differ, depending on whether the user is editing a page in a portal or the Home portal.

If you view a page while another user is editing it, you may not immediately see the results of those edits in your session. To reliably see any changes, view the page after the other user has saved.

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

12.4.3 Opening a Page in the Page Editor (Composer)

If you created or have permissions to edit a page, you can modify it in the page editor (Composer).

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

1. In the portal editor (see Section 6.1, "Opening the Portal Editor"), click the Pages tab.

2. In the left pane, select the page you want to edit (Figure 12–19).
   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:
   - Section 12.2, "Creating Pages or Subpages in a Portal"
   - Section 12.3, "Creating a Page Variant for a Device Group"
   - Section 13.2, "Adding an Existing Page to the Portal Navigation"
   - Section 13.3, "Adjusting Page Order and Hierarchy in the Portal Navigation"
   - Section 22.3.3, "Adding Items to a Navigation Model"
With the view switcher set to \textit{Web}, you can edit a page in Composer, as described in the sections that follow:

- Section 12.4.4, "Providing Page Background Color, Image, and CSS Encoding"
- Section 12.4.5, "Adding New Content Regions"
- Section 12.4.6, "Creating Layered Content Regions Using Tabs"
- Section 12.4.7, "Adding Components to a Page"

With the view switcher set to \textit{Data}, you can manage pages and other navigation items, including viewing and modifying page information, defining parameters, establishing page security, and specifying additional navigation options. For more information, see Chapter 13, "Managing a Portal Page."

### 12.4.4 Providing Page Background Color, Image, and CSS Encoding

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

\textbf{Note:} To access other page parameters, which you can use in wiring pages to page components, see Section 13.11, "Adding or Modifying Page Parameters." To set properties that control page security settings, see Section 13.15, "Setting Page Security."

To edit a page's properties:

1. Open the page in edit mode (see Section 12.4.3, "Opening a Page in the Page Editor (Composer)").
2. Click the view switcher to \textit{Web}, then click the Page Properties icon (Figure 12–20) to open the Page Properties dialog (Figure 12–21).
3. To set the page background color, open the color picker next to **Background Color**, and select a background color for the page in one of the following ways:
   - Select a color by clicking it.
   - Enter the color’s RGB equivalent in the **Background Color** field.
     **Tip:** Enter RGB values in the format #RRGGBB or r, g, b
   - Create a custom color by clicking **Custom Color** in the picker and selecting a color and a saturation level using the selector and the slider provided (Figure 12–22).
Figure 12–22  Custom Color Picker

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

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

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

5. In the Other CSS field, add any other CSS encoding you care to that is not covered by the other page properties. For example:

   background-position:center;

   You must use standard CSS syntax for this value to be valid (for more information about Other CSS, see Section 14.3.6.2, "Using the Other CSS Property").

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

12.4.5 Adding New Content Regions

You can create additional content regions by splitting a Box component into multiple Boxes.

   See Also: You can also create additional content regions by adding more Boxes to a page. For more information, see Section 15.2, "Adding a Web Development Component to a Page."

To split a layout Box on a page:

1. Open the page in edit mode (see Section 12.4.3, "Opening a Page in the Page Editor (Composer)").

2. Click the view switcher to Web and click the Design tab to display the page in Design view.

3. Go to the Box you want to split, and click the desired Add Box icon (Figure 12–23).
4. Click Save in Composer to save your changes.

See Also: For information about setting properties on a Box component, see Section 15.3, "Working with the Box Component."

12.4.6 Creating Layered Content Regions Using Tabs

When page real estate is tight, you can add layered content regions using tabs. Tabs are content regions that each have a tab and sit on top of other tabbed content regions (Figure 12–24).

Most of the actions you can perform on a tab, such as renaming, reordering, and so on, are available through tab properties. This section describes how to add tabbed content regions and how to perform various actions on tabs through tab properties:

- Section 12.4.6.1, "Adding Tabbed Content Regions"
- Section 12.4.6.2, "Reordering and Renaming Tabs"
- Section 12.4.6.3, "Adding an Icon to a Tab"
- Section 12.4.6.4, "Hiding and Showing Tabs"
- Section 12.4.6.5, "Deleting Tabs"

See Also: For information about working with tab properties, see Section 16.7, "Setting panelTabbed Properties" and Section 16.9, "Setting sidebarItem Properties."

12.4.6.1 Adding Tabbed Content Regions

Each tab you add to a page provides its own region to which you can add content.

To add tabbed content regions to a page:

1. Open the page in edit mode (see Section 12.4.3, "Opening a Page in the Page Editor (Composer)").

2. Click the view switcher to web and click the Design tab to display the page in Design view.

3. In the region (Box component) where you want to add tabs, click the Add a Tab Set or a Tab icon (Figure 12–25) one or more times.
The first tabbed region contains the content present in the layout region on which the tab was created (Figure 12–26), additional tabbed regions initially have no content.

4. Click Save in Composer to save your changes.

12.4.6.2 Reordering and Renaming Tabs

Once you create a tab, you can use tab properties to change its default name (New Tab) or position.

To rename and reorder tabs on a page:

1. Open the page in edit mode (see Section 12.4.3, "Opening a Page in the Page Editor (Composer)").

2. Click the view switcher to Web and click the Design tab to display the page in Design view.

3. Click the Edit icon on the tab you want to rename or reorder (Figure 12–27).
4. In the Component Properties dialog, on the Tabs tab, select the tab you want to rename or reorder in the Reorder the tabs list (Figure 12–28):
   - To rename the tab, enter the new name in the Text field.
   - To reorder the tab, click a Move icon to the right of the Reorder the tabs list.

5. Click OK to save your changes and exit the dialog.
6. Click Save in Composer to save your changes.
12.4.6.3 Adding an Icon to a Tab

You may want to add a meaningful icon to a tab to make its purpose obvious to knowledgeable users. Added icons are rendered to the left of the tab display name (Figure 12–29).

Figure 12–29  Icon on a Tab

To add an icon to a tab on a page:

1. Open the page in edit mode (see Section 12.4.3, "Opening a Page in the Page Editor (Composer)").
2. Click the view switcher to and click the Design tab to display the page in Design view.
3. Click the Edit icon on the tab to which you want to add an icon.
4. In the Component Properties dialog, on the Tabs tab, select the tab in the Reorder the tabs list, and set Icon Location to the URI of an image (Figure 12–30).

This property supports the following types of URIs:

- An absolute path to the image, such as:
  
  http://oracleimg.com/admin/images/ocom/hp/oralogo_small.gif

- A path located relative to the source page, such as:
  
  bullet.jpg

- A path relative to the application's context root, such as:
  
  /images/error.png

- A path relative to the application server, such as:
  
  //adf-richclient-demo-context-root/images/error.png
5. Click OK to save your changes and exit the dialog.
6. Click Save in Composer to save your changes.

12.4.6.4 Hiding and Showing Tabs

You can take a tab out of action by hiding it. Hiding a tab might be preferable to deleting because it leaves you the option of returning it to view. Hidden tabs are listed in tab properties, so you always have access to them.

**Tip:** If you hide all tabs in a tab set, you can access their properties in Composer Structure view (see Section 12.4.1.3, "About Structure View in Composer"). In Structure view, select the tabs parent element, panelTabbed, and edit its properties.

To hide or show a tab on a page:

1. Open the page in edit mode (see Section 12.4.3, "Opening a Page in the Page Editor (Composer)").
2. Click the view switcher to Web and click the Design tab to display the page in Design view.
3. Click the Edit icon on a tab you want to change.
4. In the Component Properties dialog, on the Tabs tab, select the tab under Reorder the tabs, and do one of the following (Figure 12–31):
   - Select the Hide this tab check box to hide the tab.
   - Deselect the check box to show a hidden tab.
5. Click **OK** to save your changes and exit the dialog.

6. Click **Save** in Composer to save your changes.

### 12.4.6.5 Deleting Tabs

You have a few options for deleting a tab or a tab set. You can do so through Structure or Design view in Composer, through tab properties, or on the tab itself. When you delete a tab, the contents of the tab are also deleted.

#### Note:
Whether you can delete tabs and how many tabs you can delete may be controlled by the `panelTabbed` property `Tab Removal` (see Section 16.7, "Setting `panelTabbed` Properties").

You can delete an entire tab set by deleting `panelTabbed` in Structure view.

When you remove tabs individually through `Box` properties (in Design view), you can remove all but the current tab.

To delete a tab or a tab set on a page:

1. Open the page in edit mode (see Section 12.4.3, "Opening a Page in the Page Editor (Composer)").

2. Click the view switcher to **Web** and click the **Design** tab to display the page in Design view.

3. Delete the relevant tab or tab set by doing one of the following:
To delete a tab set, go to Structure view of Composer, select the relevant panelTabbed element, and click Delete (Figure 12–32).

**Figure 12–32  Deleting a panelTabbed Element in Structure View of Page Editor**

![Figure 12–32](image)

Click Delete in the confirmation dialog.

See Also: Section 12.4.1.3, "About Structure View in Composer"

To delete one or more tabs, go to Design view of Composer, click the Edit icon on a tab in the tab set, then in the Component Properties dialog, on the Tabs tab, select the tab to delete under Reorder the tabs, and click Delete Tab (Figure 12–33).
Click **Delete** in the confirmation dialog.

**Tip:** You can also access tab set properties by selecting the `panelTabbed` in Composer Structure view (see Section 12.4.1.3, "About Structure View in Composer") and clicking the **Edit** button.

4. Click **Save** in Composer to save your changes.

### 12.4.7 Adding Components to a Page

You develop the content of a page by adding components to it in Composer. In Design view and Select view (see Section 12.4.1, "About the Page Editor (Composer)"), the resource catalog provides a gateway to a wide range of task flows, portlets, components, and other types of resources. In Structure view, you can add layout components. For information about adding components to a page, see:

- Chapter 14, "Working with Resource Catalog Components on a Page"
- Chapter 15, "Working with Web Development Components on a Page"
- Chapter 16, "Working with Layout Components on a Page"
- Chapter 17, "Working with OmniPortlet"
- Chapter 18, "Working with the Web Clipping Portlet"
- Chapter 19, "Wiring Pages, Task Flows, Portlets, and ADF Components"
12.5 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 (see the "Expression Language Expressions" appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper to add to your page.

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.

This chapter describes how to manage the pages and subpages that you create or are given permissions to manage in a portal.

For conceptual information about the different types of pages in WebCenter Portal, see Section 1.3.7, "What Are Pages?"

This chapter includes the following topics:

- Section 13.1, "Accessing Page Management"
- Section 13.2, "Adding an Existing Page to the Portal Navigation"
- Section 13.3, "Adjusting Page Order and Hierarchy in the Portal Navigation"
- Section 13.4, "Copying a Page"
- Section 13.5, "Deleting a Page"
- Section 13.6, "Viewing Information About a Page"
- Section 13.7, "Renaming a Page"
- Section 13.8, "Entering or Changing a Page Description"
- Section 13.9, "Showing or Hiding a Page in the Portal Navigation"
- Section 13.10, "Setting Page Behavior for a Specific Page When No Page Variant Exists"
- Section 13.11, "Adding or Modifying Page Parameters"
- Section 13.12, "Adjusting the Widths of Page Columns"
- Section 13.13, "Adding a Page Header and Footer"
- Section 13.14, "Viewing and Modifying Page Source Code"
- Section 13.15, "Setting Page Security"
- Section 13.16, "Setting Navigation Properties and Display Options for a Page"
13.1 Accessing Page Management

As a portal member, you will have access to pages in the portal. The portal moderator 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 created. Pages that you create are for your own use only, unless you specifically share them with other users.

Note: To create a new page in a portal, see Chapter 12, "Creating and Editing a Portal Page."

If you created or have permissions to manage a page, you can delete, edit, or set access privileges on the page. However, be aware that performing these actions affects all members in the portal.

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

1. Open the Pages page for the portal in either of the following ways:
   - In the portal editor (see Section 6.1, "Opening the Portal Editor"), click the Pages tab if it is not already displayed.
   - Select the page, then click the view switcher to Data (Figure 13–1).
In the portal administration (see Section 7.1, "Accessing Portal Administration"), click Pages in the left navigation pane, then select the page (Figure 13–2).

**Note:** If your portal is based on a portal (space) template from a release prior to WebCenter Portal release 11.1.1.8.0 and you have not upgraded it to release 11.1.1.8.0 or later (for example, if you simply imported a space from a pre-11.1.1.8.0 release), you will see a view similar to Figure 6–7. Note that there is no support for hierarchical pages (subpages), page variants, or device preview, and the portal administration does not include a Device Settings page.
2. Perform any of the actions available to you:

- **Create a new page, subpage, or page variant.** See Section 12.2.2, "Creating a Page or Subpage in an Existing Portal" and Section 12.3, "Creating a Page Variant for a Device Group."
- **Edit the selected page,** including page background and layout. See Section 12.4, "Editing a Page."
- **Add existing resources to the navigation.** See Section 13.2, "Adding an Existing Page to the Portal Navigation" and Section 22.3.3, "Adding Items to a Navigation Model."
- **Copy the selected page to create a new page.** See Section 13.4, "Copying a Page."
- **Delete the selected page.** See Section 13.5, "Deleting a Page."
- **View the selected page details.** See Section 13.6, "Viewing Information About a Page."
- **Rename the selected page.** See Section 13.7, "Renaming a Page."
- **Edit the selected page description.** See Section 13.8, "Entering or Changing a Page Description."
- **Show or hide the selected page in the portal navigation.** See Section 13.9, "Showing or Hiding a Page in the Portal Navigation."
Adding an Existing Page to the Portal Navigation

When you create pages during portal creation (see Section 2.3, "Creating Pages When Creating a New Portal"), they are automatically added to the page navigation exposed by the page template being used, as shown in the example in Figure 13–3.

If you want to expose a page that is not added to the portal navigation by default, such as a system page (tool console) or a page in another portal, follow the steps in this section.

To add a page to the portal navigation:

1. Open the Pages page (see Section 13.1, "Accessing Page Management").
2. Click the Add icon (Figure 13–4), then select Page Link to open the Pages dialog.

Note: For information about creating a new page, subpage, or page variant (for device groups), see Chapter 12, "Creating and Editing a Portal Page." To add other items in the Add list to the portal navigation, see Section 22.3.3, "Adding Items to a Navigation Model."
3. In the Pages dialog (Figure 13–5), select the page you want to add to the page navigation for the portal, and click Select.

WARNING: If you link to a page in another portal, then you must select the target page's Redirect property to set it to true (see Table 13–3). You cannot view another portal's page in the current portal, but you can redirect there to view the other portal's page in the other portal.
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.

13.3 Adjusting Page Order and Hierarchy in the Portal Navigation

To adjust the page order and hierarchy:

1. Open the Pages page (see Section 13.1, "Accessing Page Management").

2. In the left pane, select a page you want to move:
   - To change the page order, either drag the page to a new position in the page hierarchy, or click the Move icon, and select Move Up or Move Down (Figure 13–6)
   - To change the page hierarchy, click the Move 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 (Figure 13–6).
13.4 Copying a Page

If you did not create or have manage permissions on a page, you can copy the page to create your own page.

If the page you are copying includes portlets or task flows, then the customizations of those portlets or task flows are also copied. If the page you are copying include personalizations, such as rearranging page content, for only your view of the page, those personalizations are not copied into the new page.

To copy a page:

1. Open the Pages page (see Section 13.1, "Accessing Page Management").
2. In the left pane, right-click the page name, and select Copy (Figure 13–7).

---

**Figure 13–6 Moving a Page in the Portal Navigation (in Portal Editor)**

![Portal Navigation Screenshot](image)

**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.
A copy of the page is added to the portal navigation (Figure 13–8).
13.5 Deleting a Page

Permissions: To delete a page from a portal, you need the following portal-level permissions:

- Basic Services: Edit Page Access, Structure, and Content (standard permissions) or Pages: Create, Edit, and Delete Pages (advanced permissions).
- Assets: Edit Assets (standard permissions) or Navigations: Edit Navigations (advanced permissions) as deleting pages changes the portal navigation.

Portal moderators have these permissions by default.

Note that when a role’s portal page permissions are added or revoked, WebCenter Portal does not automatically add or revoke permission to edit portal navigation for the users assigned to that role. Page and assets permissions must be explicitly added or revoked.

For more information about permissions, see Section 29.1, "About Roles and Permissions for a Portal."

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

Note: Deleting a page also deletes its subpages.

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

1. Open the Pages page (see Section 13.1, "Accessing Page Management").
2. Delete a portal page in either of the following ways:
   - Right-click the page name, and select Delete (Figure 13–9).
13.6 Viewing Information About a Page

To view information about a page:

1. Open the Pages page (see Section 13.1, “Accessing Page Management”).
2. On the Summary tab (Figure 13–11), view page details such as name, description, and pretty URL.
13.7 Renaming a Page

If you created or have privileges to manage a page, you can rename the page. System pages, such as (Announcements, Lists, Events, and Documents) cannot be renamed.

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, the page navigation item, and changes the page URL to use the new name. Any pretty URLs that use the old name will be broken.

See Also: Appendix A, "WebCenter Portal Pretty URLs"

To rename a page that you created or have privileges to manage:

1. Open the Pages page (see Section 13.1, "Accessing Page Management").
2. On the Summary tab (available only for user-created pages), enter a new name in the Page Name field (Figure 13–12).
The page display name, the page navigation item, and the page URL display the new name.

### 13.8 Entering or Changing a Page Description

If you created or have privileges to manage a page, you can change the description of the page.

Be aware that changing the description of a page affects all members in the portal as this action alters the page itself, not only your view. The new description is applied to both the page navigation item and the page itself.

To enter or change the description for a page that you created or have privileges to manage:

1. Open the **Pages** page (see Section 13.1, "Accessing Page Management").
2. On the **Summary** tab, enter or modify the text in the **Description** field (Figure 13–13).

**Figure 13–13  Entering or Changing a Page Description**

The new description is applied to the page navigation item and the page itself (Figure 13–14).
13.9 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 and on the Personalize Pages page for portal members. By default, a new page that you create in a portal automatically displays in the portal navigation and on the Personalize Pages page. If you hide a page, it is removed from the portal navigation and the Personalize Pages page for all portal members.

**Note:** If your portal navigation uses a pages query to add a list of pages to the navigation, the visibility setting of the pages query filters the results of the query to expose in the navigation one of the following:

- only those pages whose Visibility property is selected
- every page regardless of their Visibility property setting
- only those pages whose Visibility property is deselected

For more information, see Table 22–1, "Fields for Specific Navigation Model Items".

To show or hide a page in the portal navigation for all members in a portal:

1. Open the Pages page (see Section 13.1, "Accessing Page Management").
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 (Figure 13–15).

**Figure 13–15  Showing or Hiding a Page**

---

**Table 22–1  Fields for Specific Navigation Model Items**

- **Name**: Meetings
- **Description**: Schedule, agenda, resources, attendees
- **Visibility**: This page is visible

Hiding pages removes them from the navigation
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 the "Expression Language Expressions" appendix in *Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper*.

### 13.10 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 (see Section 7.3.6, "Setting Page Behavior for a Portal When No Page Variant Exists"), 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. See Section 9.3.3, "Setting a Default Device Group."

  **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.
Adding or Modifying Page Parameters

See Also:
- Section 7.3.6, “Setting Page Behavior for a Portal When No Page Variant Exists”
- Chapter 9, "Managing Device Groups for a Portal"
- Section 12.1.2, "Previewing a Page Variant for a Device”
- Section 12.1.3, "Filtering a Portal Page Listing by Device Group”
- Section 12.3, "Creating a Page Variant for a Device Group”

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

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 Pages page (see Section 13.1, "Accessing Page Management”).
2. On the Summary tab, under Devices, select the required Page Fallback setting (Figure 13–16):
   - Use portal setting to use the portal-level default setting specified on the Settings page in the portal administration (see Section 7.3.6, "Setting Page Behavior for a Portal When No Page Variant Exists”).
   - 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 13–16 Setting Page Fallback Behavior When No Page Variant Exists for Current Device

<table>
<thead>
<tr>
<th>Devices</th>
</tr>
</thead>
<tbody>
<tr>
<td>Page Fallback: When no page variant exists for the device in use:</td>
</tr>
<tr>
<td>○ Use portal setting (Currently set to: Display default page)</td>
</tr>
<tr>
<td>○ Display default page</td>
</tr>
<tr>
<td>○ Display no page</td>
</tr>
</tbody>
</table>

13.11 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.
To add or modify page parameters:

1. Open the Pages page (see Section 13.1, "Accessing Page Management").
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 (Figure 13–17).

3. Click Add to add the new page parameter name/value pair to the page.
4. Repeat these steps to continue adding page parameters.

### 13.12 Adjusting the Widths of Page Columns

Many out-of-the-box page styles come with parameters that control the percentage of width allotted to each underlying page column.

The out-of-the-box page styles that provide column width parameters include:

- Blank
- Blog
- Home Page

---

**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.
Adding a Page Header and Footer

- Left Narrow
- Right Narrow
- Three Column

The out-of-the-box page styles that do not provide column width parameters include:
- Web Page
- Wiki

**See Also:** Table 25–1, "Out-of-the-Box Page Styles"

You can adjust the default values of these parameters to control the width of page layout columns. Like the default widths that are assigned with a given page style, the width values that you enter are fixed values. That is, they do not expand should you add content that exceeds the stated width.

---

**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 adjust the width of page columns:

1. Open the Pages page (see Section 13.1, "Accessing Page Management").
2. On the Parameters tab, adjust the centerWidth, leftWidth, and rightWidth parameter values to the desired percentages (Figure 13–18).

**Figure 13–18 Adjusting Page Column Width Properties**

<table>
<thead>
<tr>
<th>Summary</th>
<th>Parameters</th>
<th>Source</th>
<th>Security</th>
<th>Advanced</th>
</tr>
</thead>
</table>

**Page Parameters:**
- centerWidth 65%
- leftWidth 35%
- rightWidth 0%
- showFooter false
- showHeader false

---

13.13 Adding a Page Header and Footer

To add a page header or footer to a page, the page style used must include the parameters showHeader and showFooter. The following out-of-the-box page styles include these parameters:
- Blank
- Blog
- Home Page
Adding a page header or footer adds a content area to the top or bottom of the page, respectively. Both of these content areas are immune to user customizations, preventing them from being dragged to a new position or otherwise altered in page view mode. Figure 13–19 and Figure 13–20 illustrate a page in the Design view of Composer before and after a header and footer are added.

Figure 13–19  A Page Before a Header or Footer Is Added

Figure 13–20  A Page After a Header and Footer Are Added

To add a page header or footer:

1. Open the Pages page (see Section 13.1, "Accessing Page Management").
2. On the Parameters tab, change the value of showHeader to true to add a page header; change the value of showFooter to true to add a page footer (Figure 13–21).
3. To add content to the page header and footer (Figure 13–22), edit the page (see Section 12.4, "Editing a Page").

![Unpopulated Page with a Header and Footer](image)

**See Also:**

- Chapter 14, "Working with Resource Catalog Components on a Page"
- Section 34.3, "Adding a Selected Folder or File to a Page"
- Section 34.4, "Adding a Document Task Flow to a Page"
- Section 34.3, "Adding a Selected Folder or File to a Page"
- Chapter 15, "Working with Web Development Components on a Page"

### 13.14 Viewing and Modifying Page Source Code

You can view and modify the source code for a page on two tabs:

- The **Page** tab (Figure 13–23) shows the underlying *.jspx* file that defines the page layout and style.
- The **PageDef** tab shows the *.xml* file that defines the parameter definitions and task flow and data control bindings for the page.
To view the source code for a page:

1. Open the **Pages** page (see Section 13.1, "Accessing Page Management").
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**.
13.15 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.

To set security for all pages in a portal, set portal page permissions as described in Section 29.3, "Viewing and Editing Permissions of a Portal Role." To set security for a single page in a portal, follow the steps in this section.

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.

**See Also:** For information about how to show a hidden page in the Home portal, see the "Showing or Hiding Pages in Your View of the Home Portal" section in Using Oracle WebCenter Portal.

You may want to open a page to many users, but limit the exposure of a particular page component to a specific user, a user group, or to users who are assigned a specific application role. You can accomplish this by associating a security-related EL expression with the component instance, as described in Section 13.15.1, "Setting Security on a Page Component."

**Notes:**

- A user granted any permissions on a single page is also automatically granted Edit Navigations permission in the portal, as adding subpages and deleting pages change the portal navigation.

  Note that revoking a user’s permission on a single page does not automatically revoke their permission to edit assets. The assets permission must be explicitly revoked.

- 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 users) are included in the portal template (and subsequently in a portal that is created using the portal template).

To specify security settings for a page:

1. Open the Pages page (see Section 13.1, "Accessing Page Management").
2. On the Security tab, select the Access Method:

   - 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 (Figure 13–24).

See Also: For information about setting global portal permissions, see Section 29.3, "Viewing and Editing Permissions of a Portal Role."

To customize access on the current page, select Override Security (Figure 13–25), and continue with the next steps.

For subportals, this setting is available only if the subportal administration settings specify Stop Inheriting, as described in Section 5.6.1, "Modifying Inheritance Security Settings for a Subportal."

**Note:** You can override the page security to allow 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.

![Figure 13–24 Setting Page Security: Inherit Security](image1)

![Figure 13–25 Setting Page Security: Custom Settings](image2)

3. To modify the access permissions to users or roles listed under Role or User, select or deselect the Access check boxes, described in Table 13–1.
Notes:

- A user granted any permissions on a single page is also automatically granted Edit Navigations permission in the portal, as adding subpages and deleting pages change the portal navigation.

  Note that revoking a user’s permission on a single page does not automatically revoke their permission to edit assets. The assets permission must be explicitly revoked.

- 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>
<thead>
<tr>
<th>Table 13–1</th>
<th>Page Access Privileges</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access</td>
<td>User, Group, or Role Permissions</td>
</tr>
<tr>
<td>Grant</td>
<td>Grant other users, groups, or roles access to the page and any subpages.</td>
</tr>
<tr>
<td>Create</td>
<td>Create subpages of the current page. A user granted the Create permission on a single page can create subpages of the parent page. Because new subpages are automatically added to the portal navigation, the user is also automatically granted Edit Assets permission in the portal. Note that adding or revoking a user’s permission to create a subpage does not automatically add or revoke their permission to edit assets. Each permission must be explicitly added or revoked.</td>
</tr>
<tr>
<td>Delete</td>
<td>Delete the page and any subpages.</td>
</tr>
<tr>
<td>Edit</td>
<td>Edit the page and any subpages using the page editor, Composer. This includes adding, rearranging, and deleting content; renaming the page; and changing page properties.</td>
</tr>
<tr>
<td>Personalize</td>
<td>Personalize the page and any subpages for the user’s own view.</td>
</tr>
<tr>
<td>View</td>
<td>View the page and any subpages.</td>
</tr>
</tbody>
</table>

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 Section 30.5.1, "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.

  For more information about portal roles, see Section 29.1, "About Roles and Permissions for a Portal."

6. Select a user, group, or role by clicking in its row.
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 the 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.

10. On the Security tab, set the Access permissions as desired for each user, group, or role (see Table 13–1).

   **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.

### 13.15.1 Setting Security on a Page Component

There may be pages you want to expose to many users that have components you want only a select set of users—or even only one other user—to see. For example, imagine that you have created a portal for all sales people. The portal's home page includes two Announcements task flow instances: one for all sales people and one for sales managers only. You can secure the second Announcements instance so that only those users assigned the custom role sales_manager can see it.

Any component that has an associated Show Component property can be secured in this way. Those components that do not have an associated Show Component property can be placed inside a component that does, and in this way be secured. For example, you can place an Announcements task flow, which does not have an associated Show
Component property, inside a Box component, which does. You can set the property on the Box, and that setting will also affect the display of Announcements.

**See Also:** You can also set security on the custom components that you import through the Assets Manager. For more information, see Section 20.5.6, "Setting Security for an Asset."

To set access on a component instance:

1. Open the page in edit mode (see Section 12.4.3, "Opening a Page in the Page Editor (Composer)", and go to the component instance you want to secure, then access its **Display Options** properties in the Component Properties dialog.

   **See Also:** For information about accessing component properties, see Section 14.3, "Modifying Component Properties."

2. Next to the **Show Component** property, click the icon, then select to open the Expression Language (EL) Editor (Figure 13–26).

   ![Figure 13–26  Show Component Property](image)

3. Under **Type a Value or Expression**, enter one of the following EL expressions:

   **Note:** If you need EL assistance, an application developer can provide an EL expression; see the "Expression Language Expressions" appendix in *Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper*. 
To expose a component only to members of a particular scope who are assigned a particular role in that scope, enter:

\#{WSCecurityContext.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:

\#{WSCecurityContext.userInGroup['group_name']}\)

In lieu of group_name, enter the name of the group, for example Administrators.

To expose a component only to a specific user, enter:

\#{WSCecurityContext.currentUser['user_name']}\)

In lieu of user_name, enter the user name, for example jdoe.

4. Click OK to exit the Expression Editor, and click OK to save your changes and exit the Component Properties dialog.

5. Save your changes in Composer.

The secured component appears only to those users with the name, role, or group you specified.

13.16 Setting Navigation Properties and Display Options for a Page

You can specify various properties and display options for page navigation item to determine their appearance and behavior when the portal navigation is rendered.

See Also: To set properties on non-page navigation items, see Section 22.3.4, "Setting Properties for an Item in the Navigation Model."

To set navigation properties or display options for a page navigation item:

1. Open the Pages page (see Section 13.1, "Accessing Page Management") and select the page navigation item.

2. On the Advanced tab, specify information about the page on the Target pane (Figure 13–27), as described in Table 13–2, then click Save.
3. Set page navigation options on the **Options** pane (Figure 13–28), as described in Table 13–3, then click **Save**.

**Table 13–2 Page Navigation Item Settings: Advanced Tab (Target Pane)**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ID</td>
<td>Automatically populated with a generated ID. This ID is used to create the URL to access the page in the navigation model. The ID must be unique within the navigation model. The first character must be either an uppercase or lowercase letter or the underscore character (<em>). Subsequent characters can be any alphanumeric character or a dash (-), period (.), or underscore (</em>). If the page is at the top level of the navigation model, the ID must not be wcsnavtitle or wcnav_externalId; these IDs are reserved.</td>
</tr>
<tr>
<td>Path</td>
<td>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 <strong>Select</strong> icon to browse the content repository for the page.</td>
</tr>
<tr>
<td>Page Template</td>
<td>A dropdown 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.</td>
</tr>
</tbody>
</table>
**Figure 13–28  Setting Navigation Options for a Page: Options Pane**

<table>
<thead>
<tr>
<th>Summary</th>
<th>Parameters</th>
<th>Source</th>
<th>Security</th>
<th>Advanced</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

These are advanced settings affecting navigation

<table>
<thead>
<tr>
<th>Access Key</th>
<th>Icon URI</th>
<th>Search Keywords</th>
<th>Tool Tip</th>
<th>External ID</th>
<th>Open Link in</th>
<th>Redirect</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>&lt;Default&gt;</td>
<td></td>
</tr>
</tbody>
</table>

New Attribute Name: [field]  New Attribute Value: [field]  Add

### Table 13–3  Page Navigation Item Settings: Options Pane

<table>
<thead>
<tr>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Access Key</strong></td>
</tr>
<tr>
<td><strong>Icon URI</strong></td>
</tr>
<tr>
<td><strong>Search Keywords</strong></td>
</tr>
<tr>
<td><strong>Tool Tip</strong></td>
</tr>
<tr>
<td><strong>External ID</strong></td>
</tr>
<tr>
<td><strong>Open Link In</strong></td>
</tr>
<tr>
<td><strong>Redirect</strong></td>
</tr>
</tbody>
</table>
Table 13–3 (Cont.) Page Navigation Item Settings: Options Pane

<table>
<thead>
<tr>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>New Attribute Name</strong></td>
</tr>
<tr>
<td><strong>New Attribute Value</strong></td>
</tr>
</tbody>
</table>

**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 the “Expression Language Expressions” appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.
This chapter describes how to add a component from the resource catalog to a page, how to customize and set properties on components, and how to delete a component.

For conceptual information about the different types of pages in WebCenter Portal, see Section 1.3.7, "What Are Pages?"

This chapter includes the following topics:

- Section 14.1, "Accessing the Resource Catalog"
- Section 14.2, "Adding a Component to a Page"
- Section 14.3, "Modifying Component Properties"
- Section 14.4, "Deleting a Component from a Page"

Permissions: To perform the tasks in this chapter, you need the portal-level permission Basic Services: Edit Page Access, Structure, and Content (standard permissions) or the Pages: Edit Pages (advanced permissions). A portal moderator has this permission by default.

For more information about permissions, see Section 29.1, "About Roles and Permissions for a Portal."

14.1 Accessing the Resource Catalog

Resource catalogs are portal assets that expose components and connections that you can add to a portal. You can use a resource catalog to populate pages, page templates, and task flows. The items listed in a resource catalog are collectively referred to as resources. For more information, see Chapter 23, "Working with Resource Catalogs."

The resource catalog available to you as you edit a page, page template, or task flow is established by the portal administration settings, and may be a built-in resource catalog or a custom resource catalog. For more information, see Section 7.3.5, "Changing the Resource Catalogs for Pages and the Page Template for a Portal."

When you edit a page, the resource catalog is available either inline (in Design view and Select view), by clicking the Add Content button when you hide the inline resource catalog (in Design view), or by clicking the Add content into the selected component icon in Structure view. For more information, see Section 14.2, "Adding a Component to a Page."
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. You can add a component to a page in any of the page editor views:

■ Section 14.2.1, "Adding a Component to a Page in Design View"
■ Section 14.2.2, "Adding a Component to a Page in Select View"
■ Section 14.2.3, "Adding a Component to a Page in Structure View"

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 more information, see Section 23.1, "About Resource Catalogs."

■ For a full list of all components available in WebCenter Portal, you can refer to the Resource Registry (see Section 23.2, "About the Resource Registry"). If the component you want is not present in the resource catalog that has been made available to the page, you may need to add it. For more information, see Section 23.5.1, "Adding a Resource to a Resource Catalog" and Section 7.3.5, "Changing the Resource Catalogs for Pages and the Page Template for a Portal."

14.2.1 Adding a Component to a Page in Design View

To add a component to a page in Design view (see Section 12.4.1.1, "About Design View in Composer"): 

Note: If your portal is based on a portal (space) template from a release prior to WebCenter Portal release 11.1.1.8.0 and you have not upgraded it to release 11.1.1.8.0 or later (for example, if you simply imported a space from a pre-11.1.1.8.0 release), you will see a view similar to Figure 6–7. Note that there is no support for hierarchical pages (subpages), page variants, or device preview, and the portal administration does not include a Device Settings page. Refer to the WebCenter Portal Documentation on OTN for working with a page in a space for the pre-11.1.1.8.0 release at http://www.oracle.com/technetwork/middleware/webcenter/portal/documentation/index.html.

If your portal is based on a portal template from WebCenter Portal release 1.1.1.8.0 or later, either an out-of-the-box template (see Table 3–1, "Out-of-the-Box Portal Templates and Categories") or a custom template, continue with the steps in this section.
1. Open the page in edit mode (see Section 12.4.3, "Opening a Page in the Page Editor (Composer)").

**Note:** By default, the view switcher is set to \( \text{Web} \) and Composer displays the page in Design view showing the inline resource catalog (Figure 14–1).

![Figure 14–1 Inline Resource Catalog in Design View](image)

2. (Optional) To hide the inline resource catalog, and instead show each area of the page with an Add Content button to help you identify where you can add components, click Hide Catalog (Figure 14–2). When you click an Add Content button, the standalone resource catalog opens. The standalone resource catalog does not support drag-and-drop of components to the page.

Click Show Catalog to expose the inline resource catalog again.
3. In the resource catalog, navigate to the component you want to add to the page by clicking **Open** next to folders to drill down to related components, or search for it. As an example, Figure 14–3 shows the components available in the **Web Development** folder in the inline resource catalog.

---

**Note:** For a description of the components available in the default resource catalogs, see Section 23.1, "About Resource Catalogs." The resource catalog available to the current page may be customized to include fewer or more components than the default resource catalogs.

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. See Chapter 23, "Working with Resource Catalogs," specifically Section 23.5.1, "Adding a Resource to a Resource Catalog."
4. Add new components to the page in the following ways:

- Click Add next to a component in the resource catalog to add the component to the top of the page by default.

  **Note:** If an existing component has previously been selected on the page in Select view, then the new component will be added after the selected component.

- (Inline resource catalog only) Drag the icon of a component from the inline resource catalog to a target location on the page (Figure 14–4).
5. To move components on the page, click the Actions icon in the component header to move the component up or down, or click the component header and drag it to a new position.

6. Click Save to save your changes.

### 14.2.2 Adding a Component to a Page in Select View

To add a component to a page in Select view (see Section 12.4.1.2, "About Select View in Composer"):

1. Open the page in edit mode (see Section 12.4.3, "Opening a Page in the Page Editor (Composer)").

2. Click the view switcher to Select and click the Select tab to display the page in Select view showing the inline resource catalog (Figure 14–5).
3. (Optional) To hide the inline resource catalog, click **Hide Catalog**. Unlike Design view, Select view does not display **Add Content** buttons when you hide the inline resource catalog.

**Tip:** To target the location of new components in Select view, as **Add Content** buttons do in Design view, you can select an existing layout container (such as a Box or Movable Box component) in Select view, then click **Add** next to a component in the resource catalog to add the component inside the selected layout container.

Click **Show Catalog** (Figure 14–6) to expose the inline resource catalog again.
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.

   **Note:** For a description of the components available in the default resource catalogs, see Section 23.1, "About Resource Catalogs." The resource catalog available to the current page may be customized to include fewer or more components than the default resource catalogs.

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. See Chapter 23, "Working with Resource Catalogs," specifically Section 23.5.1, "Adding a Resource to a Resource Catalog."

5. Add new components to the page in the following ways:
   - Click **Add** next to a component in the resource catalog to add the component to the top of the page by default.
   - Select an existing layout container (such as a Box or Movable Box component) on the page, then click **Add** next to a component in the resource catalog to add the component inside the selected layout container.
   - Select any other component that is not a layout container, then click **Add** next to a component in the resource catalog to add the component below the selected component.
   - Drag the icon of a component from the inline resource catalog to a target location on the page (Figure 14–7).
Figure 14–7  Adding a Component to a Page in Select View

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

### 14.2.3 Adding a Component to a Page in Structure View

To add a component to a page in Structure view (see Section 12.4.1.3, "About Structure View in Composer"):  

1. Open the page in edit mode (see Section 12.4.3, "Opening a Page in the Page Editor (Composer)").

2. Click the view switcher to **Web** and click the **Structure** tab to display the page in Structure view (Figure 14–8).
3. 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.

4. Click the Add content into the selected component icon to open the resource catalog (Figure 14–9).

5. 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.

6. Click Save to save your changes.

14.3 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:

- Section 14.3.1, "About Component Properties"
- Section 14.3.2, "Setting Properties on a Component"
- Section 14.3.3, "Working with Component Parameters"
- Section 14.3.4, "Working with Component Display Options"
- Section 14.3.5, "Working with Child Components"
- Section 14.3.6, "Working with Style and Content Style Properties"
- Section 14.3.7, "Working with Component Contextual Events"

14.3.1 About Component Properties

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

See Also: Chapter 19, "Wiring Pages, Task Flows, Portlets, and ADF Components"

The Component Properties dialog for a component is divided into multiple tabs:

- Parameters—Settings, unique to the component type, that can control such things as the source of the component’s content. See Section 14.3.3, "Working with Component Parameters."
- Display Options—Settings for determining content orientation, hiding and showing a header, selecting a display method for an actions menu, and the like. See Section 14.3.4, "Working with Component Display Options."
- Child Components—A list of all the components contained in the parent component. See Section 14.3.5, "Working with Child Components."
- Style—Font, color, and dimension settings on the component that override such values on the parent component, the page, and the application. Style values affect component content and the elements that surround the content, but may or may not be exposed depending on whether or not the component elements (such as the skin) support modifications to these settings. See Section 14.3.6, "Working with Style and Content Style Properties."
- Content Style—Font, color, and dimension settings on component content that override such values specified for Style. These settings may or may not be exposed depending on whether or not the component elements (such as the skin) support modifications to these settings. See Section 14.3.6, "Working with Style and Content Style Properties."
14.3.2 Setting Properties on a Component

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

**See Also:** For information about properties associated with a particular component, see the section that covers that component. For example, see Section 15.3.2, "Setting Box Component Properties" for information about properties associated with the Box component.

You can access the Component Properties dialog for a component from any view of the page editor:

- [Section 14.3.2.1, "Setting Component Properties in Design View"](#)
- [Section 14.3.2.2, "Setting Component Properties in Select View"](#)
- [Section 14.3.2.3, "Setting Component Properties in Structure View"](#)

**Notes:**

- When you enter most types of property values in the Component Properties dialog and then click **Apply**, the dialog remains open. With values other than expected value types, the dialog closes, and the page is refreshed to reflect the new value. For example, if a component takes a `java.util.ArrayList` of `java.awt.Color` classes, then the Component Properties dialog closes after you add the value, and the page refreshes with the new properties.

- In addition to entering literal text (`value`), you can also enter an Expression Language (EL) expressions (`# {value}`). If you need EL assistance, an application developer can provide an EL expression; see the "Expression Language Expressions" appendix in *Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper*.

- When you enter EL on the generic **Display Options** tab in the Component Properties 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 14–1, "Display Options Properties".

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

14.3.2.1 Setting Component Properties in Design View

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

1. Open the page in edit mode (see Section 12.4.3, "Opening a Page in the Page Editor (Composer)").
2. Click the Edit icon (Figure 14–10) on the component to open the Component Properties dialog.

![Edit Icon on a Component](image)

3. In the Component Properties dialog, click the tabs to view and edit the component properties. For more information about the categories, see:

   - component properties, then click OK to close the Component Properties dialog.

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

4. In the Component Properties dialog, click the tabs to view and edit the component properties.

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

   For more information about the different categories of component properties, see:

   - Section 14.3.3, "Working with Component Parameters"
   - Section 14.3.4, "Working with Component Display Options"
   - Section 14.3.5, "Working with Child Components"
   - Section 14.3.6, "Working with Style and Content Style Properties"
   - Section 14.3.7, "Working with Component Contextual Events"

5. Click OK to close the properties dialog.

### 14.3.2.2 Setting Component Properties in Select View

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

1. Open the page in edit mode (see Section 12.4.3, "Opening a Page in the Page Editor (Composer)").
2. Click the view switcher to [Web] and click the Select tab to display the page in Select view.

3. Click the component on the page to select it (it is highlighted with a blue border), then select from the popup menu (Figure 14–11).
   - **Edit Component** to open the Component Properties dialog for the component.
   - **Edit Parent Component** to open the Component Properties dialog for the containing parent component.

**Figure 14–11 Setting Component Properties in Select View**

4. In the Component Properties dialog, click the tabs to view and edit the component properties.

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

For more information about the different categories of component properties, see:

- Section 14.3.3, "Working with Component Parameters"
- Section 14.3.4, "Working with Component Display Options"
- Section 14.3.5, "Working with Child Components"
- Section 14.3.6, "Working with Style and Content Style Properties"
- Section 14.3.7, "Working with Component Contextual Events"

5. Click OK to close the properties dialog.

### 14.3.2.3 Setting Component Properties in Structure View

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

1. Open the page in edit mode (see Section 12.4.3, "Opening a Page in the Page Editor (Composer)").

2. Click the view switcher to [Web] and click the Structure tab to display the page in Structure view.

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

4. Click the **Show the properties of component name** icon above the hierarchical list pane (Figure 14–12) to open the Component Properties dialog.
5. In the Component Properties dialog, click the tabs to view and edit the component properties.

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

For more information about the different categories of component properties, see:

- Section 14.3.3, "Working with Component Parameters"
- Section 14.3.4, "Working with Component Display Options"
- Section 14.3.5, "Working with Child Components"
- Section 14.3.6, "Working with Style and Content Style Properties"
- Section 14.3.7, "Working with Component Contextual Events"

6. Click OK to close the properties dialog.

### 14.3.3 Working with Component Parameters

Component parameters appear on the Parameters tab of the Component Properties dialog (Figure 14–13).
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. Parameters descriptions are provided in the sections of this guide that describe each component. Additionally, the online help available in the Parameters dialog provides access to detailed parameter descriptions.

Enter parameter values, or click the icon next to a parameter field to select and open the Expression Language (EL) Editor. If you need EL assistance, an application developer can provide an EL expression; see the "Expression Language Expressions" appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

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.

### 14.3.4 Working with Component Display Options

The **Display Options** tab in the Component Properties dialog provides access to properties that control a range of display-related behaviors on a given component instance (Figure 14–14).
Figure 14–14  Component Display Options; Basic Properties

For example, use the display options on an Image component to specify the image source URL and its optional link target. Use the display options on the Announcement Manager task flow to hide or show a header and enable or disable menus and other options on the header.

Several components have a Display Options tab that is divided into two subtabs: Basic and Advanced.

This provides a means of separating an otherwise long list of display options into more manageable and relevant groups. Though it is not obvious in Design view of the page editor, the showDetailFrame component is usually wrapped around the task flows provided by the various services. Consequently, the Display Options properties for task flows, and any other component wrapped in a showDetailFrame, have Basic and Advanced subtabs on their Display Options tab.

Another consequence of being wrapped in a showDetailFrame is commonality of properties on the Display Options tab. Task flows and any other components that are wrapped in a showDetailFrame share the same Display Options properties.

For many of the properties on the Display Options tab, an Expression Editor is available for entering custom values, such as text strings and Expression Language (EL) expressions. Click the icon next to a property field (Figure 14–15), then select Expression Builder to open the editor. If you need EL assistance, an application developer can provide an EL expression; see the “Expression Language Expressions” appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

See Also:  Section 14.3.2, "Setting Properties on a Component"
Modifying Component Properties

Figure 14–15  Edit Icon for Expression Editor

Typically, the Display Options tab presents settings that affect the display elements surrounding component content (that is, its chrome). Chrome includes the header, the Actions menu, Expand and Collapse icons, and the like.

Table 14–1 lists and describes the Display Options properties that generally apply to most components. Where there are variations, they are noted in the chapters covering the specific components.

Note: When you enter EL on the generic Display Options tab in the Component Properties 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 14–1, "Display Options Properties".

EL validation is not performed on non-generic display options.
Table 14–1  Display Options Properties

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allow Minimize</td>
<td>Select whether to show the minimize action on the component header (that is, a <strong>Collapse</strong> icon on the component chrome).</td>
</tr>
<tr>
<td></td>
<td>■ Select the check box to show the <strong>Collapse</strong> icon.</td>
</tr>
<tr>
<td></td>
<td>■ Deselect the check box to omit the <strong>Collapse</strong> icon.</td>
</tr>
<tr>
<td></td>
<td>The minimize action collapses the component like a window shade, leaving only its header on view.</td>
</tr>
<tr>
<td>Allow Move</td>
<td>Select whether to enable users to move the component on the page. Choose from:</td>
</tr>
<tr>
<td></td>
<td>■ <strong>enabled</strong>—Component can be moved using the Move options (<strong>Move Up</strong>, <strong>Move Down</strong>, <strong>Move Left</strong>, and <strong>Move Right</strong>) on the component Actions menu.</td>
</tr>
<tr>
<td></td>
<td>■ <strong>drag and drop only</strong>—Component can be moved using drag and drop only.</td>
</tr>
<tr>
<td></td>
<td>■ <strong>disabled</strong>—Component cannot be moved.</td>
</tr>
<tr>
<td>Allow Remove</td>
<td>Select whether to show the <strong>Remove</strong> icon on the component header (that is, the component chrome) when the page is in <strong>view mode</strong>. Choose from:</td>
</tr>
<tr>
<td></td>
<td>■ Select the check box to show the <strong>Remove</strong> icon on the component header in view mode.</td>
</tr>
<tr>
<td></td>
<td>■ Deselect the check box to omit the <strong>Remove</strong> icon in view mode.</td>
</tr>
</tbody>
</table>

When a component is minimized, the icon toggles to an **Expand** icon, which you can use to restore the full component to view.

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 edit mode.
Modifying Component Properties

Table 14–1  (Cont.) Display Options Properties

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allow Resize</td>
<td>Select whether to show a window resizer on a component instance. The window resizer enables you to increase the component height.</td>
</tr>
<tr>
<td></td>
<td>Select the check box to show the Resize option on the component.</td>
</tr>
<tr>
<td></td>
<td>Deselect the check box to omit the Resize option.</td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
<tr>
<td>Chrome Style</td>
<td>Select to specify a shade for the component background.</td>
</tr>
<tr>
<td></td>
<td>Enter:</td>
</tr>
<tr>
<td></td>
<td>light—Light is transparent; the prevailing background color shows through</td>
</tr>
<tr>
<td></td>
<td>medium—Medium draws an light line below the header area.</td>
</tr>
<tr>
<td></td>
<td>dark—A graduated shade moving from the bottom of the header area to the top of the component from transparent to dark.</td>
</tr>
<tr>
<td></td>
<td>coreDefault—A graduated shade slightly lighter than dark</td>
</tr>
<tr>
<td>Display Header</td>
<td>Select this check box to show a header on the component instance.</td>
</tr>
<tr>
<td>Display Shadow</td>
<td>Select to render a shadow behind the component instance.</td>
</tr>
<tr>
<td>Font</td>
<td>Specify the font to use for text appearing in the component header.</td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
<tr>
<td>Font Color</td>
<td>Select a color for the text appearing in the component header.</td>
</tr>
<tr>
<td></td>
<td>Select a color using one of the following techniques:</td>
</tr>
<tr>
<td></td>
<td>Select a color by clicking it.</td>
</tr>
<tr>
<td></td>
<td>Enter the color's RGB equivalent in the Font Color field. Enter RGB values in the format RRGGBB or #RRGGBB or r,g,b</td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
</tbody>
</table>
The **Child Components** tab in the Component Properties dialog (Figure 14–16) provides controls for hiding, showing, and rearranging the components that are contained within the current (parent) component.

### Table 14–1 (Cont.) Display Options Properties

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Font Size</strong></td>
<td>Specify the size of text appearing in the component header. Enter a value using one of the following types of values:</td>
</tr>
<tr>
<td></td>
<td>- <em>length</em>—Sets the font size to a fixed size. For example, enter: 14px, 1.5em, and so on</td>
</tr>
<tr>
<td></td>
<td>- <em>xx-small, x-small, or small</em></td>
</tr>
<tr>
<td></td>
<td>- <em>medium</em>—The default</td>
</tr>
<tr>
<td></td>
<td>- <em>large, x-large, or xx-large</em></td>
</tr>
<tr>
<td></td>
<td>- <em>smaller</em>—Sets the font size to a size smaller than the parent element.</td>
</tr>
<tr>
<td></td>
<td>- <em>larger</em>—Sets the font size to a size larger than the parent element.</td>
</tr>
<tr>
<td></td>
<td>- <em>%</em>—Sets the current font size to a percentage of the font size of the parent element. For example, enter: 75%</td>
</tr>
<tr>
<td><strong>Font Style</strong></td>
<td>Select an option for applying a font style to the text in a component header. Choose from:</td>
</tr>
<tr>
<td></td>
<td>- <em>Bold</em></td>
</tr>
<tr>
<td></td>
<td>- <em>Italic</em></td>
</tr>
<tr>
<td></td>
<td>- <em>Underline</em></td>
</tr>
<tr>
<td></td>
<td>- <em>Strikethrough</em></td>
</tr>
<tr>
<td><strong>Short Desc</strong></td>
<td>Provide tooltip text for the component instance. When users roll their mouse pointers over the component instance, the text you enter here pops up.</td>
</tr>
<tr>
<td><strong>Show Actions On Hover</strong></td>
<td>Select to show actions when users hover their mouse pointers over the component header.</td>
</tr>
<tr>
<td></td>
<td>- Select the check box to show actions only when users hover their mouse pointers over the component header.</td>
</tr>
<tr>
<td></td>
<td>- Deselect the check box to always show actions on the component header.</td>
</tr>
<tr>
<td></td>
<td><em>Display Header</em> must be selected for this option to apply.</td>
</tr>
<tr>
<td><strong>Show Component</strong></td>
<td>Option for hiding or showing the component instance on the page</td>
</tr>
<tr>
<td></td>
<td>- Select to show the component.</td>
</tr>
<tr>
<td></td>
<td>- Deselect to hide the component.</td>
</tr>
<tr>
<td></td>
<td>Once you hide a component in this way, you can show it again using controls available in <em>Composer</em> Structure view. In Structure view, right-click the hidden component, and select <strong>Show Component</strong> from the resulting context menu.</td>
</tr>
<tr>
<td><strong>Text</strong></td>
<td>Enter text to appear in the component header. If you select to hide the header, the value you enter here is ignored.</td>
</tr>
</tbody>
</table>
Modifying Component Properties

Figure 14–16  Child Components Tab in Component Properties Dialog

The changes you make through the Child Components tab are customizations that affect every user's view of the component instance.

This section provides information about working with the Child Components tab:

- Section 14.3.5.1, "Customizing the Display Name of Child Components"
- Section 14.3.5.2, "Hiding and Showing Child Components"
- Section 14.3.5.3, "Rearranging Child Components"

14.3.5.1 Customizing the Display Name of Child Components

When multiple child components are of the same type, they may be indistinguishable from each other in the list of child components. For example, a panelGroupLayout component uses the value of its layout attribute (for example, vertical) as the display name, so multiple panelGroupLayout components may all have the same name in the list of child components, as illustrated in Figure 14–17 in Structure view.

See Also:  Section 14.3.2, "Setting Properties on a Component"
If you need to identify and work with a specific child component, you can edit the source code of a page to specify a unique display name for any component to make it easily distinguishable. This display name is shown in hint text and the Component Properties dialog. This is a developer task, described in the "Customize the Display Name of Child Components" section of *Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper*.

14.3.5.2 Hiding and Showing Child Components

Hiding is useful for keeping a component instance out of general view while still maintaining its presence on the page. When you hide a child component through the Component Properties dialog, it is hidden in everyone's view of the page. When you are ready to show the component instance, it is a simple matter to reselect the component to show through the Child Components tab.

To hide or show child components:

1. On the Child Components tab, either:
1. Deselect the check box to the left of any components you want to hide.

2. Select the check box to the left of any components you want to show.

2. Click OK to exit the dialog.

3. Click Save to save your changes.

14.3.5.3 Rearranging Child Components

The Child Components tab provides a convenient and efficient way to rearrange the content within a particular container, such as a Box component. When you rearrange child components through the Component Properties dialog, they are rearranged on everyone’s view of the page.

Tip: You can also rearrange page components in everyone’s view by clicking the component header and dragging it to a new position in Composer.

Note: When you use Box controls to split a Box, the rearrange capability is disabled in the Component Properties dialog on the Child Components tab. You can still rearrange content in such boxes by dragging and dropping on the page itself.

To rearrange a child component:

1. On the Child Components tab, click the up or down arrows next to the component you want to move.

   Tip: The direction that a child component is moved depends on the orientation of its parent container. For example, if the container is oriented vertically, child components move up (up arrow) or down (down arrow); if the container is oriented horizontally, child components move right (up arrow) or left (down arrow).

2. Click OK to exit the dialog.

3. Click Save to save your changes.

14.3.6 Working with Style and Content Style Properties

The Style and Content Style tabs in the Component Properties dialog (Figure 14–18 and Figure 14–18) provide an opportunity to fine-tune your application look-and-feel at the component level. Enter values for Style and Content Style properties, or specify your own values through the Other CSS property that appears on both tabs.
Figure 14-18  Style Tab in Component Properties Dialog

Component Properties: Movable Box

<table>
<thead>
<tr>
<th>Display Options</th>
<th>Style</th>
<th>Content Style</th>
</tr>
</thead>
<tbody>
<tr>
<td>Margin</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Top</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bottom</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Left</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Right</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Style Class</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other CSS</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Apply  OK  Cancel
This section describes the Style and Content Style properties, including the Other CSS property:

- Section 14.3.6.1, "Style and Content Style Properties"
- Section 14.3.6.2, "Using the Other CSS Property"
- Section 14.3.6.3, "Other CSS Property Example"

14.3.6.1 Style and Content Style Properties

Style settings on a component override the style settings on hierarchically superior components, such as the component's parent container, the page, and the application. Content Style settings override Style settings. For example, in a Movable Box 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 as described in Table 14–2, these settings may not take effect due to other settings that apply to the component.

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Background Color</strong></td>
<td>Select a component background color.</td>
</tr>
<tr>
<td></td>
<td>If you specify a background color for Content Style, then the background color specified for the Style property is not applied.</td>
</tr>
<tr>
<td><strong>Background Image</strong></td>
<td>Enter the URL to an image you want to render in the component background. Use standard CSS syntax. For example: url(<a href="http://www.abc.com/image.jpg">http://www.abc.com/image.jpg</a>)</td>
</tr>
<tr>
<td><strong>Color</strong></td>
<td>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:</td>
</tr>
<tr>
<td></td>
<td>■ Select a color by clicking it.</td>
</tr>
<tr>
<td></td>
<td>■ Enter the color’s RGB equivalent in the Color field. Enter RGB values in the format RGB or #RGB or r,g,b</td>
</tr>
<tr>
<td></td>
<td>■ 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.</td>
</tr>
<tr>
<td><strong>Font</strong></td>
<td>Specify the font to use for text appearing in the component header.</td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Font Size</strong></td>
<td>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:</td>
</tr>
<tr>
<td></td>
<td>■ length—Sets the font size to a fixed size. For example, enter: 14px. 1.5em, and so on</td>
</tr>
<tr>
<td></td>
<td>■ xx-small, x-small, or small</td>
</tr>
<tr>
<td></td>
<td>■ medium—The default</td>
</tr>
<tr>
<td></td>
<td>■ large, x-large, or xx-large</td>
</tr>
<tr>
<td></td>
<td>■ smaller—Sets the font size to a size smaller than the parent element.</td>
</tr>
<tr>
<td></td>
<td>■ larger—Sets the font size to a size larger than the parent element.</td>
</tr>
<tr>
<td></td>
<td>■ %—Sets the current font size to a percentage of the font size of the parent element. For example, enter: 75%</td>
</tr>
<tr>
<td><strong>Font Style</strong></td>
<td>Select the style for the component fonts. Choose from:</td>
</tr>
<tr>
<td></td>
<td>■ Bold</td>
</tr>
<tr>
<td></td>
<td>■ Italic</td>
</tr>
<tr>
<td></td>
<td>■ Underline</td>
</tr>
<tr>
<td></td>
<td>■ Strikethrough</td>
</tr>
<tr>
<td></td>
<td>The font style you select here applies to any text inside the component.</td>
</tr>
</tbody>
</table>
### 14.3.6.2 Using the Other CSS Property

The Other CSS field on the Style and Content Style tabs allows you to apply CSS styles that are not covered by other properties. Use standard CSS syntax (see \[http://www.w3.org/TR/CSS2/propidx.html\](http://www.w3.org/TR/CSS2/propidx.html)), separating multiple entries with a semicolon (;). Use the Style Class property to specify the CSS style class to use for the component (see Table 14–2).

For example:

background: #00FF00 url(http://www.google.com/intl/en_ALL/images/logo.gif)
Table 14–3 provides a few examples of CSS you can use in the **Other CSS** field. **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.
<table>
<thead>
<tr>
<th>Value</th>
<th>Description and Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>font-size</td>
<td>Size of component text relative to either your browser’s default font size or the font</td>
</tr>
<tr>
<td></td>
<td>size of the parent element.</td>
</tr>
<tr>
<td></td>
<td>Syntax:</td>
</tr>
<tr>
<td></td>
<td>font-size:value</td>
</tr>
<tr>
<td></td>
<td>where value is one of the following:</td>
</tr>
<tr>
<td></td>
<td>■ length—fixed font size; for example: font-size: 14px.</td>
</tr>
<tr>
<td></td>
<td>■ xx-small</td>
</tr>
<tr>
<td></td>
<td>■ x-small</td>
</tr>
<tr>
<td></td>
<td>■ small</td>
</tr>
<tr>
<td></td>
<td>■ medium—default.</td>
</tr>
<tr>
<td></td>
<td>■ large</td>
</tr>
<tr>
<td></td>
<td>■ x-large</td>
</tr>
<tr>
<td></td>
<td>■ xx-large</td>
</tr>
<tr>
<td></td>
<td>■ smaller—smaller font than the parent element.</td>
</tr>
<tr>
<td></td>
<td>■ larger—larger font than the parent element.</td>
</tr>
<tr>
<td></td>
<td>■ x%—a percentage of the font size of the parent element; for example: font-size:</td>
</tr>
<tr>
<td></td>
<td>■ 75%.</td>
</tr>
<tr>
<td>background-position</td>
<td>Starting position of a background image.</td>
</tr>
<tr>
<td></td>
<td>Syntax:</td>
</tr>
<tr>
<td></td>
<td>background-position:value1 value2</td>
</tr>
<tr>
<td></td>
<td>Typically, you enter two values. Except where noted, if you specify only one value,</td>
</tr>
<tr>
<td></td>
<td>the second value is interpreted as center.</td>
</tr>
<tr>
<td></td>
<td>value1 value2 express horizontal and vertical as positions in any of the following</td>
</tr>
<tr>
<td></td>
<td>combinations:</td>
</tr>
<tr>
<td></td>
<td>■ top left</td>
</tr>
<tr>
<td></td>
<td>■ top center</td>
</tr>
<tr>
<td></td>
<td>■ top right</td>
</tr>
<tr>
<td></td>
<td>■ center left</td>
</tr>
<tr>
<td></td>
<td>■ center center</td>
</tr>
<tr>
<td></td>
<td>■ center right</td>
</tr>
<tr>
<td></td>
<td>■ bottom left</td>
</tr>
<tr>
<td></td>
<td>■ bottom center</td>
</tr>
<tr>
<td></td>
<td>■ bottom right</td>
</tr>
<tr>
<td></td>
<td>■ x% y%—Horizontal (x) and vertical (y) positions expressed as percentage. The top</td>
</tr>
<tr>
<td></td>
<td>left corner is 0% 0%. The bottom right corner is 100% 100%. If you specify only one</td>
</tr>
<tr>
<td></td>
<td>value, the other value is interpreted as 50%. You can mix % and positions.</td>
</tr>
<tr>
<td></td>
<td>■ x y—Horizontal (x) and vertical (y) positions expressed as unit of measure. The top</td>
</tr>
<tr>
<td></td>
<td>left corner is 0 0. Units can be pixels (0px 0px) or other CSS units. If you specify</td>
</tr>
<tr>
<td></td>
<td>only one value, the other value is interpreted as 50%. You can mix % and positions.</td>
</tr>
<tr>
<td></td>
<td>For example:</td>
</tr>
<tr>
<td></td>
<td>background-position: top left</td>
</tr>
</tbody>
</table>

Table 14–3  Example Values for Other CSS (may be overridden by other settings)
One example application of the Other CSS property is to provide a variety of borders on task flows, portlets, and some web development components.

For example, Figure 14–20 depicts a Recent Activity task flow without borders.
To create borders around the task flow, access its properties (see Section 14.3.2, "Setting Properties on a Component") and add CSS encoding in the Other CSS field on the Style tab in the Component Properties dialog, as shown in Figure 14–21:

Figure 14–21  Adding CSS Encoding to a Component

Figure 14–22 illustrates the result.
14.3.7 Working with Component Contextual Events

Events are defined occurrences within the current context. Event handlers are the engines that drive the results of that occurrence.

For example, imagine two components: one is the producer of some kind of content (a payload) and the other consumes the content. When you wire these components to each other, you can use events to specify that when an event is triggered on the producer, the producer broadcasts a contextual event with a payload parameter, which the consumer component consumes through an event handler.

The Events tab in the Component Properties dialog provides a means of wiring a contextual event to an action handler to enable the passing of values from a producer component to a consumer component when the event is triggered on the producer (Figure 14–23).
Not all components support contextual events because not all components were created to include them; therefore, the **Events** tab does not appear for all components. For events to be available at runtime, event capability must be included in a component when the component is developed.

**Table 14–4** lists and describes the properties presented on an **Events** tab.
Deleting a Component from a Page

For information about wiring components, see Chapter 19, "Wiring Pages, Task Flows, Portlets, and ADF Components."

14.4 Deleting a Component from a Page

The controls for deleting a component are located on the component itself in Design view and on the header of the hierarchical list pane in Structure view. This section describes how to delete components in both Design view and Structure view (you cannot delete a component in Select view):

- Section 14.4.1, "Deleting a Component in Design View"
- Section 14.4.2, "Deleting a Component in Structure View"

### 14.4.1 Deleting a Component in Design View

To delete a component from a page in Design view:

1. Open the page in edit mode (see Section 12.4.3, "Opening a Page in the Page Editor (Composer)").

   **Note:** By default, the view switcher is set to Web and Composer displays the page in Design view showing the inline resource catalog.

2. Click the Remove icon on the component header or, if no header is shown, on the component’s floating palette (Figure 14–24).

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Events</td>
<td>A list of all contextual events associated with components on the current page. An event describes the type of action that triggers another action, such as the passing of a value. The listed events were built in to the component when the component was created. All components do not include events; therefore, all components are not intrinsically capable of being wired to other components.</td>
</tr>
<tr>
<td>Actions</td>
<td>A list of action handlers associated with the selected consumer component The listed actions vary according to which consumer component is selected. Actions enable you to associate an event with an event handler, which specifies what should happen when the triggering event occurs. The listed actions were built in to the component when the component was created.</td>
</tr>
<tr>
<td>Enable Action</td>
<td>A check box for enabling or disabling the selected event and action. When you select this check box, a list of selected action handler parameters appears.</td>
</tr>
<tr>
<td>List of selected action handler parameters</td>
<td>Fields for entering values to use to deliver the payload from the producer component to the consumer component whenever the event occurs Parameter fields appear only when the Enable Action check box is selected.</td>
</tr>
</tbody>
</table>
Deleting a Component from a Page

14.4.2 Deleting a Component in Structure View

To delete a component from a page in Structure view:

1. Open the page in edit mode (see Section 12.4.3, "Opening a Page in the Page Editor (Composer)").

2. Click the view switcher to **Web** and click the **Structure** tab to display the page in Structure view.

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

4. Click the **Delete** icon on the list header (Figure 14–25).

5. 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.

6. Click **Save** to save your changes.
15

Working with Web Development Components on a Page

This chapter describes how to add the components in the Web Development section of the default resource catalogs to a page and how to work with them.

For conceptual information about the different types of pages in WebCenter Portal, see Section 1.3.7, "What Are Pages?"

This chapter includes the following topics:

- Section 15.1, "About Web Development Components"
- Section 15.2, "Adding a Web Development Component to a Page"
- Section 15.3, "Working with the Box Component"
- Section 15.4, "Working with the Change Language Component"
- Section 15.5, "Working with the HTML Markup Component"
- Section 15.6, "Working with the Hyperlink Component"
- Section 15.7, "Working with the Image Component"
- Section 15.8, "Working with the Links Component"
- Section 15.9, "Working with the Movable Box Component"
- Section 15.10, "Working with the Text Component"
- Section 15.11, "Working with the Web Page Component"

Permissions: To perform the tasks in this chapter, you need the portal-level permission Basic Services: Edit Page Access, Structure, and Content (standard permissions) or the Pages: Edit Pages (advanced permissions). A portal moderator has this permission by default.

For more information about permissions, see Section 29.1, "About Roles and Permissions for a Portal."

15.1 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).

15.2 Adding a Web Development Component to a Page

The process of adding a web development component to a page is the same as the process for any resource catalog component, as described in Section 14.2, "Adding a Component to a Page."

To add a web development component to a page:

1. From the resource catalog in the page editor (Composer), click the Open link next to Web Development to display a selection of web development components (Figure 15–1).

2. Click Add next to the component that you want to add to the page.

3. Set properties for the new component:
   - Section 15.3.2, "Setting Box Component Properties"
   - Section 15.4, "Working with the Change Language Component"
   - Section 15.5.2, "Setting HTML Markup Component Properties"
   - Section 15.6.2, "Setting Hyperlink Component Properties"
   - Section 15.7.2, "Setting Image Component Properties"
   - Section 15.8, "Working with the Links Component"
   - Section 15.9.2, "Setting Movable Box Component Properties"
   - Section 15.10.2, "Setting Text Component Properties"
   - Section 15.11.2, "Setting Web Page Component Properties"
15.3 Working with the Box Component

This section provides an overview of the Box component and lists and describes its associated properties. It includes the following subsections:

- Section 15.3.1, “About the Box Component”
- Section 15.3.2, “Setting Box Component Properties”
15.3.1 About the Box Component

To add a Box component to a page, see Section 15.2, "Adding a Web Development Component to a Page."

A Box is a content area that you can use to place other components on the page. Unlike its counterpart, Movable Box (see Section 15.9.1, "About the Movable Box Component"), a Box cannot be moved around the page at application runtime, though its content can be rearranged. The Box component is the landing place for the task flows, portlets, and other components that you add to a page.

Common activities on this component are setting the background color and changing the padding, performed in the Component Properties dialog on the Style tab. See Section 14.3.6, "Working with Style and Content Style Properties."

In Composer, a Box is typically rendered as rectangle comprised of dashed lines, and Add Box, Edit, and Delete icons (Figure 15–2).

*Figure 15–2  Box Component Above a Movable Box Component*

Not all Box controls appear every time. What you see depends on your permissions, whether the Box is the top-most Box (which cannot be deleted, thus no Delete icon), whether the Box is stretched (in which case you cannot add other Boxes to it, thus no controls for doing so), and whether Box properties are set to show or omit certain controls (for more information, see Table 15–1, "Box Component Display Options").

You can place content within a Box, and you can place one or more Boxes within a Box (unless the Box is configured to stretch its content, that is, the Box property Layout equals stretch). You can configure Box properties to display content horizontally, vertically, or stretched. You can specify the display of a scrollbar or set the Box to devote all its area to a single component (stretched). You can use Box controls to add Boxes above, below, or to either side of a given Box and to add a tab or a tab set within the Box.

**See Also:** For information about adding tab sets and configuring tabs, see Section 12.4.6, "Creating Layered Content Regions Using Tabs."
You could, if you like, add one Box to a page, and use its controls to add all the Boxes and tabs you require, rather than adding multiple Boxes from the resource catalog for that purpose (see Section 15.2, “Adding a Web Development Component to a Page”).

15.3.2 Setting Box Component Properties

See Also: Section 14.3.2, "Setting Properties on a Component"

Box component properties allow you to specify the alignment and orientation of Box content, rearrange Box components, and provide tooltip text on the Box.

Box component properties include a Child Components tab with options for hiding, showing, and rearranging the Box content. For more information, see Section 14.3.5, "Working with Child Components."

A Style tab is available for setting styles on the component instance. The styles you set here override the styles that would otherwise govern the component’s appearance—primarily the styles provided by the application skin. Box style properties are common to many other components. Commonly shared Style properties are listed and described in Section 14.3.6, "Working with Style and Content Style Properties."

Table 15–1 lists and describes Box component display options (Figure 15–3).

Figure 15–3  Box Component Properties

<table>
<thead>
<tr>
<th>Display Options</th>
<th>Style</th>
</tr>
</thead>
<tbody>
<tr>
<td>Horizontal Alignment</td>
<td>start ▼</td>
</tr>
<tr>
<td>Layout</td>
<td>vertical ▼</td>
</tr>
<tr>
<td>Short Desc</td>
<td>▼</td>
</tr>
<tr>
<td>Vertical Alignment</td>
<td>top ▼</td>
</tr>
<tr>
<td>▼ Show Component</td>
<td></td>
</tr>
</tbody>
</table>

See Also: Section 14.3.2, "Setting Properties on a Component"
Table 15–1  Box Component Display Options

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Horizontal Alignment</td>
<td>Specifies how Box content should align between its left and right boundaries:</td>
</tr>
<tr>
<td></td>
<td>■  start—Align content with the front position, determined by the reading order of the selected language. This value is provided to accommodate environments that support bidirectional languages.</td>
</tr>
<tr>
<td></td>
<td>■  center—Align content with the center of the Box.</td>
</tr>
<tr>
<td></td>
<td>■  end—Align content with the final position, determined by the reading order of the selected language. This value is provided to accommodate environments that support bidirectional languages.</td>
</tr>
<tr>
<td></td>
<td>■  left—Align content with the left side of the Box.</td>
</tr>
<tr>
<td></td>
<td>■  right—Align content with the right side of the Box.</td>
</tr>
<tr>
<td>Layout</td>
<td>Specifies the orientation of Box content:</td>
</tr>
<tr>
<td></td>
<td>■  vertical—Align Box content in a vertical orientation (that is, as a column of objects).</td>
</tr>
<tr>
<td></td>
<td>■  horizontal—Align Box content in a horizontal orientation (that is, as a row of objects). When Layout is set to horizontal, this component cannot be stretched by a parent component that stretches its children.</td>
</tr>
<tr>
<td></td>
<td>■  scroll—Align Box content vertically with a vertical scrollbar. The scrollbar is rendered when the height of its content exceeds the Box’s height.</td>
</tr>
<tr>
<td></td>
<td>■  stretch—Stretch Box content to accommodate the specified size of the Box. If no height (see Section 14.3.6, &quot;Working with Style and Content Style Properties&quot;) is specified for the Box, it defaults to a height of 200 pixels, unless the Box is placed inside another stretching component. In this case, the Box height is controlled by its parent (but see, horizontal). When you select stretch, you cannot drag and drop content into the Box. Additionally, you cannot split a Box with a Layout value of stretch.</td>
</tr>
<tr>
<td></td>
<td>■  auto—The child component is stretched only if the Box is stretched by its parent. If not, the content scrolls.</td>
</tr>
<tr>
<td>Short Desc</td>
<td>Specifies tooltip text for the Box.</td>
</tr>
<tr>
<td></td>
<td>Tooltip text appears when users roll their mouse pointers over the Box.</td>
</tr>
<tr>
<td>Show Component</td>
<td>Hides or shows the component on the page:</td>
</tr>
<tr>
<td></td>
<td>■  Select to show the component</td>
</tr>
<tr>
<td></td>
<td>■  Deselect to hide the component</td>
</tr>
<tr>
<td></td>
<td>Once you hide a component in this way, any child components are also hidden. You can show the component again using Composer Structure view (see Section 12.4.1.3, &quot;About Structure View in Composer&quot;). In Structure view, right-click the hidden component and select Show Component from the resulting context menu.</td>
</tr>
<tr>
<td>Vertical Alignment</td>
<td>Specifies how Box content should align between its top and bottom boundaries:</td>
</tr>
<tr>
<td></td>
<td>■  top—Align content at the top of the Box.</td>
</tr>
<tr>
<td></td>
<td>■  middle—Align content with the middle of the Box.</td>
</tr>
<tr>
<td></td>
<td>■  bottom—Align content at the bottom of the Box.</td>
</tr>
<tr>
<td></td>
<td>■  baseline—Align content at the Box baseline, which is slightly above the bottom. Vertical Alignment applies only when the layout is horizontal.</td>
</tr>
</tbody>
</table>
15.4 Working with the Change Language Component

See Section 61.3.1, "Adding a Change Language Task Flow to a Page."

15.5 Working with the HTML Markup Component

This section provides an overview of the HTML Markup component and lists and describes its associated properties. It also provides a sample use case for embedding a YouTube video onto a page.

This section includes the following subsections:

- Section 15.5.1, "About the HTML Markup Component"
- Section 15.5.2, "Setting HTML Markup Component Properties"

15.5.1 About the HTML Markup Component

To add an HTML Markup component to a page, see Section 15.2, "Adding a Web Development Component to a Page."

The HTML Markup component is a simple editor for entering raw text and HTML tags, including JavaScript embedded in HTML `<script>` tags (Figure 15–4).

Figure 15–4  An HTML Markup Component

Enter markup through the editor's component properties:

- Enclose JavaScript in the appropriate HTML markup. The HTML must be valid XHTML.
  
  For example (Figure 15–5):

  ```html
  <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.
Working with the HTML Markup Component

**WARNING:** This component must be used with caution as it can cause pages to break if not used properly. If necessary to resolve errors, you can remove the component in Structure view (see Section 12.4.1.3, "About Structure View in Composer"), or log out and log in again to reset Composer.

### Figure 15–5  Sample JavaScript in HTML Markup Display Options

The editor’s header appears in Composer, 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.

### 15.5.2 Setting HTML Markup Component Properties

**See Also:** Section 14.3.2, "Setting Properties on a Component"

HTML Markup component properties provide a means of entering a brief bit of HTML markup, JavaScript, text, or Expression Language (EL).

In addition to content entry, use the properties on the Display Options tab of the Component Properties dialog (Table 15–2) to control text entry behavior and provide tooltip text (in the Short Desc property).
HTML Markup component properties include a **Style** tab with options for setting styles on the component instance. The styles you set here override the styles that would otherwise govern the component’s appearance. These include styles set on the component’s parent container, the current page, and the application. HTML Markup style properties are common to many other components, and are listed and described in Section 14.3.6, "Working with Style and Content Style Properties."

Table 15–2 lists and describes HTML Markup component display options (Figure 15–5).

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
</table>
| **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 `&lt;script&gt;` 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 `&#8212;` 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. |
| **Show Component** | An option for hiding or showing the component on the page.  
  - Select to show the component  
  - Deselect to hide the component  
  Once you hide a component in this way, any child components are also hidden. You can show the component again in Composer Structure view (see Section 12.4.1.3, "About Structure View in Composer"). In Structure view, right-click the hidden component, and select **Show Component** from the resulting context menu. |
| **Value**      | A field for specifying the content that this component renders.  
  In addition to text, this 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:  
  ```html  
  <object width="640" height="385">  
  <param name="movie"  
      values="http://www.youtube.com/v/cAYw2zcSIPw?fs=1&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. |
15.6 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:

- Section 15.6.1, "About the Hyperlink Component"
- Section 15.6.2, "Setting Hyperlink Component Properties"

15.6.1 About the Hyperlink Component

To add a Hyperlink component to a page, see Section 15.2, "Adding a Web Development Component to a Page."

Use the Hyperlink component to add a link to a page. The Hyperlink can point to a location that is either internal or external to the application.

A Hyperlink component (Figure 15–6) is comprised of two elements: the link text and the link URL, both of which are added through component properties.

Figure 15–6  Hyperlink Component

Hyperlinks can take both internal and external link targets. For an internal target, you can use a relative directory path. For an external target (a target outside of the portal), always use the full URL.

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 the "Managing Your Favorites" chapter in Using Oracle WebCenter Portal.

An easy way to obtain the direct URL to a portal page is to access its Page Information dialog. For more information, see Section 13.6, "Viewing Information About a Page."

Hyperlink component properties include a Style tab with options for setting styles on the component instance. The styles you set here override the styles that would otherwise govern the component’s appearance. These include styles set on the component’s parent container, the current page, and the application. Hyperlink style properties are common to many other components. Commonly shared Style properties are listed and described in Section 14.3.6, "Working with Style and Content Style Properties."
15.6.2 Setting Hyperlink Component Properties

**See Also:** Section 14.3.2, "Setting Properties on a Component"

Hyperlink component properties provide a means of specifying link text, target destination, and open behavior.

Table 15–3 lists and describes Hyperlink component display options (Figure 15–7).

**Figure 15–7 Hyperlink Component Properties**

![Hyperlink Component Properties](image)

**Table 15–3 Hyperlink Component Display Options**

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Destination</td>
<td>A field for entering the hyperlink target URL. Enter the web address of the page to link to.</td>
</tr>
</tbody>
</table>
You can add images to a portal in any of the following ways:

- An Image component, which can optionally link to another location when clicked. Note that image components cannot be returned in a search. This section describes the Image component.

- An image file, which is selected from the connected content repository to display on a page standalone or in a Content Presenter task flow. Image files can be returned in a search. To add an image file to a page, see Section 34.3, "Adding a Selected Folder or File to a Page."

- An image added to a wiki document or wiki page, using the Embed Image tool in the Rich Text Editor. To add an image to a wiki, see the "About the Rich Text Editor Toolbar" section in Using Oracle WebCenter Portal.

This section provides an overview of the Image component, and lists and describes its associated properties. It includes the following subsections:

- Section 15.7.1, "About the Image Component"
- Section 15.7.2, "Setting Image Component Properties"

See Also: For information about using images from the Documents service, see Section 34.2, "About Document Components."

### 15.7.1 About the Image Component

To add an Image component to a page, see Section 15.2, "Adding a Web Development Component to a Page."

Use the Image component to add graphic items such as a picture, a logo, or a linked image to another location, such as a web site or a portal page (Figure 15–8).
Use any web-compatible image from any accessible location, such as the connected content repository or a URL. Do not use images from an external server that requires authentication.

**Tip:** If you want to display an image that is not linked and is returned in a search, consider using an image file (see Section 34.3, "Adding a Selected Folder or File to a Page").

### 15.7.2 Setting Image Component Properties

**See Also:** Section 14.3.2, "Setting Properties on a Component"

Image component properties provide a means of specifying the location of the image file, an optional hyperlink target, *ALT* text, and a target frame for the hyperlink.

Image component properties include a **Style** tab with options for setting styles on the component instance. The styles you set here override the styles that would otherwise govern the component’s appearance. These include styles set on the component’s parent container, the current page, and the application. Image style properties are common to many other components. Commonly shared Style properties are listed and described in Section 14.3.6, "Working with Style and Content Style Properties."

Table 15–4 lists and describes Image component display options (Figure 15–9).
Working with the Image Component

Figure 15–9  Image Component Properties

Table 15–4  Image Component Display Options

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Destination</td>
<td>A URL for the Image link target destination. The link target can be a URL that is either internal or external to the application. For an internal target (a portal page), you can use a directory path relative to the application root directory. The runtime behavior differs depending on whether this value is set to an internal or external URL:</td>
</tr>
<tr>
<td></td>
<td>• For an internal URL (for example, <a href="http://host:port/webcenter/spaces/page/myPage">http://host:port/webcenter/spaces/page/myPage</a>), clicking the image opens a new window displaying the target page. Clicking the image again opens a new window each time the image is clicked.</td>
</tr>
<tr>
<td></td>
<td>• For an external URL (for example, <a href="http://www.google.com">http://www.google.com</a>), clicking the image opens a new window displaying the target site. Clicking the image again refreshes the same window each time the image is clicked.</td>
</tr>
<tr>
<td>Icon</td>
<td>The URL to the image file that represents the image in its active, unclicked state. Use any web-compatible image from any internal or publicly-accessible location.</td>
</tr>
<tr>
<td>Short Desc</td>
<td>Image ALT text. ALT text appears as a tooltip when users roll their mouse pointers over the image.</td>
</tr>
</tbody>
</table>
Working with the Links Component

This section provides information about the Links component, how to set it up, and how to configure its properties. It includes the following subsections:

- Section 15.8.1, "About the Links Component"
- Section 15.8.2, "Adding Navigation Links Using the Links Component"
- Section 15.8.3, "Configuring an Advanced Search for Content Links"
- Section 15.8.4, "Configuring a Link in the Links Component"
- Section 15.8.5, "Reordering Navigation Links"
- Section 15.8.6, "Deleting a Link from the Links Component"
- Section 15.8.7, "Setting Links Component Properties"

15.8 Working with the Links Component

This section provides information about the Links component, how to set it up, and how to configure its properties. It includes the following subsections:

- Section 15.8.1, "About the Links Component"
- Section 15.8.2, "Adding Navigation Links Using the Links Component"
- Section 15.8.3, "Configuring an Advanced Search for Content Links"
- Section 15.8.4, "Configuring a Link in the Links Component"
- Section 15.8.5, "Reordering Navigation Links"
- Section 15.8.6, "Deleting a Link from the Links Component"
- Section 15.8.7, "Setting Links Component Properties"

15.8.1 About the Links Component

To add a Links component to a page, see Section 15.2, "Adding a Web Development Component to a Page."

Use the Links component to add a navigation instance to a page. Links component navigation can include links to pages, external web sites, and application content. A
browse capability is available to simplify the process of locating link targets. An advanced search feature is also available to assist in locating application objects, such as a file.

The Links component enables you to add a single instance of navigation to an application page, outside the more formal structure of your portal's navigation (Figure 15–10).

**Figure 15–10  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 be modified in the portal.

- When a portal is exported or imported, any links associated with portal pages are also exported or imported.

The Links component's Add Link, Edit Link, and Delete Link actions are available in both page view mode and edit mode (Composer) to users with Edit Page permission on the page. Users without Edit Page permission see only the added navigation links. Changes in both edit and view modes are visible to all users who can view the page. That is, the addition of links falls outside the constraints of user customization, where changes made in page view mode are visible only to the user who made them.

A control is available for specifying that a link target is opened within the context of the current page template or in place of the page on which it was invoked. There are also controls on each link for configuring a given link's properties and deleting the link (Figure 15–11).

**Figure 15–11  Controls on Individual Links**

The Links component's properties provide opportunities for controlling the behavior and look and feel of a Links component instance. For more information, see
15.8.2 Adding Navigation Links Using the Links Component

To add portal navigation links using the Links component:

1. Click the Add Link menu (Figure 15–11) and select a link type:
   - Page Link—Add a link that targets an application page.
   - External Link—Add a link that targets a site that is external to the application.
   - Content Link—Add a link that targets a document from a content repository.

To add a Page Link:

   a. Select Page Link to open the New Page Link dialog (Figure 15–12).

   ![New Page Link Dialog](image)

   b. In the Name field, enter a display name for the link.

c. For Path, click the Search icon to open the Select a Page dialog (Figure 15–13).
Working with the Links Component

Figure 15–13 Select a Page Dialog

- 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.

- Click **Select**.

- Click **OK**.

To add an External Link:

- Select **External Link** to open the New External Link dialog (**Figure 15–14**).
Figure 15–14  New External Link Dialog

![New External Link](image)

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Name</strong></td>
<td>New External Link</td>
</tr>
<tr>
<td><strong>URL</strong></td>
<td>http://</td>
</tr>
<tr>
<td><strong>Render in page template</strong></td>
<td>Check this box to include link content in page template.</td>
</tr>
</tbody>
</table>

b. In the **Name** field, enter a display name for the link.

c. In the **URL** field, enter the URL to the link target, for example:

   http://www.mywebdestination.com

d. 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.

e. Click **OK**.

To add a Content Link:

a. Select **Content Link** to open the New Content Link dialog (Figure 15–15).

Figure 15–15  New Content Link Dialog

![New Content Link](image)

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Name</strong></td>
<td>New Content Link</td>
</tr>
<tr>
<td><strong>Path</strong></td>
<td><img src="icon" alt="Search Icon" /></td>
</tr>
</tbody>
</table>

b. In the **Name** field, enter a display name for the link.

c. For **Path**, click the Search icon to open the Select Document dialog.

   If necessary, use the **Filter** feature to locate the link target. For a more directed search, click **Advanced**. For more information, see Section 15.8.3, “Configuring an Advanced Search for Content Links”
Figure 15–16  Select Document Dialog

<table>
<thead>
<tr>
<th>Name</th>
<th>Size</th>
<th>Last Modified</th>
</tr>
</thead>
<tbody>
<tr>
<td>Meetings</td>
<td></td>
<td></td>
</tr>
<tr>
<td>lincoln stamps.doc</td>
<td>133 KB</td>
<td>6/20/13 2:22 PM</td>
</tr>
<tr>
<td>lincoln stamps_files.zip</td>
<td>86 KB</td>
<td>6/20/13 2:22 PM</td>
</tr>
<tr>
<td>lincoln stamps.gif</td>
<td>69 KB</td>
<td>6/20/13 2:22 PM</td>
</tr>
<tr>
<td>lincoln stamps.html</td>
<td>17 KB</td>
<td>6/20/13 2:22 PM</td>
</tr>
<tr>
<td>lincoln stamps large.pdf</td>
<td>116 KB</td>
<td>6/20/13 2:22 PM</td>
</tr>
<tr>
<td>lincoln stamps.pdf</td>
<td>78 KB</td>
<td>6/20/13 2:22 PM</td>
</tr>
<tr>
<td>lincolnstampssheet.jpg</td>
<td>32 KB</td>
<td>6/20/13 2:27 PM</td>
</tr>
<tr>
<td>Meeting Minutes</td>
<td>1 KB</td>
<td>6/21/13 3:32 PM</td>
</tr>
<tr>
<td>newprescoins.jpg</td>
<td>32 KB</td>
<td>6/20/13 2:27 PM</td>
</tr>
<tr>
<td>cbamaprescoin.jpg</td>
<td>32 KB</td>
<td>6/20/13 2:27 PM</td>
</tr>
<tr>
<td>cbama stamps.doc</td>
<td>20 KB</td>
<td>6/20/13 2:27 PM</td>
</tr>
<tr>
<td>reaganstamps2.gif</td>
<td>58 KB</td>
<td>6/20/13 2:28 PM</td>
</tr>
<tr>
<td>reagan stamps.doc</td>
<td>20 KB</td>
<td>6/20/13 2:28 PM</td>
</tr>
<tr>
<td>reagan stamps.gif</td>
<td>117 KB</td>
<td>6/20/13 2:28 PM</td>
</tr>
<tr>
<td>stampchart.xls</td>
<td>9 KB</td>
<td>6/20/13 2:28 PM</td>
</tr>
<tr>
<td>Upcoming Events.dcx</td>
<td>12 KB</td>
<td>6/20/13 2:28 PM</td>
</tr>
<tr>
<td>washington stamps.doc</td>
<td>20 KB</td>
<td>6/20/13 2:28 PM</td>
</tr>
</tbody>
</table>

**d.** Click **Select**.

**e.** Click **OK** to close the New Content Link dialog.

### 15.8.3 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 15–16), click **Advanced** to open the Advanced Search dialog (Figure 15–17).
Figure 15–17  Advanced Search Dialog

This search is very similar to an advanced document search. For more information, see the “Running an Advanced Document Search” section in Using Oracle WebCenter Portal.

15.8.4 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 15–18).

To configure a link:

1. In the Links component, click the Configure icon to open the Edit type Link dialog (Figure 15–19).
## 15.8.5 Reordering Navigation Links

To reorder navigation links in a Links component in Composer 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.

## 15.8.6 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 15–20).

![Delete Icon on a Link](image)
15.8.7 Setting Links Component Properties

**See Also:** [Section 14.3.2, "Setting Properties on a Component”](#)

The Display Options properties you set on the Links component affect only the particular instance of the Links component. Links Display Options properties are common to many other components. Commonly shared Display Options are listed and described in [Section 14.3.4, "Working with Component Display Options.”](#)

Similarly, the Links component Style properties are common to many other components. Commonly shared Style properties are listed and described in [Section 14.3.6, "Working with Style and Content Style Properties.”](#) The styles you set on the Links component override the styles that would otherwise govern the component’s appearance. These include styles set on the component’s parent container, the current page, and the application skin.

15.9 Working with the Movable Box Component

This section provides an overview of the Movable Box component. It includes the following subsections:

- [Section 15.9.1, "About the Movable Box Component”](#)
- [Section 15.9.2, "Setting Movable Box Component Properties”](#)

15.9.1 About the Movable Box Component

To add a Movable Box component to a page, see [Section 15.2, "Adding a Web Development Component to a Page.”](#)

A Movable Box (Figure 15–21) 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 Composer (in Design view) and view mode.

![Figure 15–21 Movable Box Component Below Box Component](image)
In Composer (in Design view) 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.

### 15.9.2 Setting Movable Box Component Properties

**See Also:** Section 14.3.2, "Setting Properties on a Component"

The Display Options associated with Movable Boxes provide a means of hiding or showing the Movable Box header, providing header text, adding a tooltip to the Movable Box that users see when they roll their mouse pointers over the header, and other like controls.

Movable Box Display Options are common to many other types of components and are listed in Table 14–1, "Display Options Properties".

Movable Box Display Options are presented on two subtabs: **Basic** and **Advanced** (Figure 15–22).

**Figure 15–22  Movable Box Component Display Options**

By default, each Movable Box encloses a Box component. For information about Box component properties, see Section 15.3.2, "Setting Box Component Properties."
15.10 Working with the Text Component

This section provides an overview of the Text component and lists and describes its associated properties. It includes the following subsections:

- Section 15.10.1, "About the Text Component"
- Section 15.10.2, "Setting Text Component Properties"

15.10.1 About the Text Component

To add a Text component (Figure 15–23) to a page, see Section 15.2, "Adding a Web Development Component to a Page."

*Figure 15–23 Text Component*

Text

![Text Component](image)

Enter your text here

The Text component provides a simplified rich text editor, which you can use to add text to a page (such as a brief statement, information, or page instructions) and apply text styles and formatting (Figure 15–24) The Source Code Editing Mode icon allows you to enter HTML.

*Figure 15–24 Text Component Text Editor*

![Text Component Text Editor](image)

Enter your text here

15.10.2 Setting Text Component Properties

*See Also:* Section 14.3.2, "Setting Properties on a Component"

The Display Options associated with the Text component provide a means of hiding or showing the component header, providing header text, adding a tooltip that users see when they roll their mouse pointers over the header, and other like controls.

Text Display Options are common to many other types of components and are listed in Table 14–1, "Display Options Properties".

Text component properties include a Style tab with options for setting styles on the component instance. The styles you set here override the styles that would otherwise govern the component’s appearance. These include styles set on the component’s parent container, the current page, and through the application skin. Text style properties are common to many other components. Commonly shared Style properties are listed and described in Section 14.3.6, "Working with Style and Content Style Properties."
15.11 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:

- Section 15.11.1, "About the Web Page Component"
- Section 15.11.2, "Setting Web Page Component Properties"

15.11.1 About the Web Page Component

To add a Web Page component to a page, see Section 15.2, "Adding a Web Development Component to a Page."

The Web Page component provides a means of opening a view onto another web page within the context of a portal page (Figure 15–25).

![Web Page Component](image)

This is your web page.

The content exposed through a Web Page component retains all of the controls associated with the exposed web page. These controls retain their functionality, enabling you to, for example, control the volume of a video, edit a wiki, or post an entry to a blog, depending on the type of content you expose.

You can use internal and external link targets for a Web Page. For an internal target, you can use a relative directory path.

**Tip:** In the 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 the "Managing Your Favorites” chapter in Using Oracle WebCenter Portal.

The Web Page component provides a variation on the Web Page page style offered through the Create Page dialog (for more information, see Table 25–1, "Out-of-the-Box Page Styles"). The Web Page page style is useful for offering the full external web page experience. In contrast, the Web Page component is useful for including web page content along with other content types on an application page.
Web Page component properties include a **Style** tab with options for setting styles on the component instance. The styles you set here override the styles that would otherwise govern the component's appearance. These include styles set on the component's parent container, the current page, and the application. Web Page style properties are common to many other components. Commonly shared Style properties are listed and described in Section 14.3.6, "Working with Style and Content Style Properties."

### 15.11.2 Setting Web Page Component Properties

**See Also:** Section 14.3.2, "Setting Properties on a Component"

Web Page component properties provide a means of specifying the URL of the content to render in the Web Page area and the **ALT** text to display when users roll their mouse pointers over the component border.

Table 15–5 lists and describes Web Page component display options.

**Figure 15–26  Web Page Component Properties**

<table>
<thead>
<tr>
<th>Component Properties: Web Page</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Display Options</strong></td>
</tr>
<tr>
<td>Short Desc</td>
</tr>
<tr>
<td>Source</td>
</tr>
<tr>
<td>✓ Show Component</td>
</tr>
</tbody>
</table>
### Web Page Component Display Options

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
</table>
| **Short Desc** | A field for entering ALT text for the Web Page area.  
Note that, for the Web Page component, the ALT text appears only when users hover their mouse pointers over the component border. You can increase the active area by increasing the padding around the component using the Other CSS property on the Component Properties Style tab. For example, you can enter the following in the Other CSS text box:  
padding-top:30px; |
| **Select** | 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 Section 14.3.6, “Working with 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 Section 15.11.1, “About the Web Page Component” |
| **Show Component** | An option for hiding or showing the component on the page.  
- Select to show the component  
- Deselect to hide the component  
Once you hide a component in this way, any child components are also hidden. You can show the component again in Composer Structure view (see Section 12.4.1.3, “About Structure View in Composer”). In Structure view, right-click the hidden component, and select **Show Component** from the resulting context menu. |

**See Also:** Display Options properties additionally provide access to an Expression Language (EL) editor, which you can use to enter and test EL values. If you need EL assistance, an application developer can provide an EL expression; see the “Expression Language Expressions” appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.
16

Working with Layout Components on a Page

This chapter describes the types of layout components that support page infrastructure, but are not available through the resource catalog.

This chapter includes the following topics:

- Section 16.1, "About Layout Components"
- Section 16.2, "Setting gridCell Properties"
- Section 16.3, "Setting gridRow Properties"
- Section 16.4, "Setting panelGridLayout Properties"
- Section 16.5, "Setting panelGroupLayout Properties"
- Section 16.6, "Setting panelStretchLayout Properties"
- Section 16.7, "Setting panelTabbed Properties"
- Section 16.8, "Setting showDetailFrame Properties"
- Section 16.9, "Setting sidebarItem Properties"
- Section 16.10, "Setting spacer Properties"

Permissions: To perform the tasks in this chapter, you need the portal-level permission Basic Services: Edit Page Access, Structure, and Content (standard permissions) or the Pages: Edit Pages (advanced permissions). A portal moderator has this permission by default.

For more information about permissions, see Section 29.1, "About Roles and Permissions for a Portal."

16.1 About Layout Components

Some page layout components are not exposed for use in the resource catalog. They are associated with the components on a page, and are configurable when you edit a page in Structure view (Figure 16–1).

See Also: Section 12.4.1.3, "About Structure View in Composer"
Figure 16–1  Structure View of Page Edit Mode

Table 16–1 lists and describes the layout components you are likely to encounter in Structure view of the page editor.

<table>
<thead>
<tr>
<th>Layout Component</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>gridCell</td>
<td>In a panelGridLayout component, each gridRow component uses one or more</td>
</tr>
<tr>
<td></td>
<td>gridCell components to describe the cells for columns in that row of the</td>
</tr>
<tr>
<td></td>
<td>grid layout structure. Each cell defines width, margins, column span, row</td>
</tr>
<tr>
<td></td>
<td>span, horizontal alignment, and vertical alignment. For more information, see</td>
</tr>
<tr>
<td>gridRow</td>
<td>In a panelGridLayout component, one or more gridRow components describe the</td>
</tr>
<tr>
<td></td>
<td>rows of a grid layout structure. Each row defines a height and margins. For</td>
</tr>
<tr>
<td></td>
<td>more information, see Section 16.3, “Setting gridRow Properties.”</td>
</tr>
<tr>
<td>panelGridLayout</td>
<td>Provides a means of arranging a series of child components vertically or</td>
</tr>
<tr>
<td></td>
<td>horizontally (no wrapping), or consecutively (wrapping). The Layout property</td>
</tr>
<tr>
<td></td>
<td>determines the arrangement of the child components. For more information, see</td>
</tr>
<tr>
<td></td>
<td>Section 16.4, “Setting panelGridLayout Properties.”</td>
</tr>
<tr>
<td>panelGroupLayout</td>
<td>Provides a means of arranging a series of child components vertically or</td>
</tr>
<tr>
<td></td>
<td>horizontally (no wrapping), or consecutively (wrapping). The Layout property</td>
</tr>
<tr>
<td></td>
<td>determines the arrangement of the child components. For more information, see</td>
</tr>
<tr>
<td></td>
<td>Section 16.5, “Setting panelGroupLayout Properties.”</td>
</tr>
<tr>
<td>panelStretchLayout</td>
<td>Provides a means of arranging content in defined areas on a page. Useful for</td>
</tr>
<tr>
<td></td>
<td>enabling content to stretch when the browser is resized. An example of a</td>
</tr>
<tr>
<td></td>
<td>panelStretchLayout component is a task flow that uses the Stretch task flow</td>
</tr>
<tr>
<td></td>
<td>style (see Section 27.3.3, “Creating a Task Flow to Visualize Data”). For</td>
</tr>
<tr>
<td></td>
<td>more information, see Section 16.6, “Setting panelStretchLayout Properties.”</td>
</tr>
<tr>
<td>panelTabbed</td>
<td>The parent component of a tab set. For more information, see Section 16.7,</td>
</tr>
<tr>
<td></td>
<td>“Setting panelTabbed Properties.”</td>
</tr>
</tbody>
</table>
### Setting gridCell Properties

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.

Properties for the `gridCell` component include a Child Components tab with options for hiding, showing, and rearranging component content. For more information, see Section 14.3.5, "Working with Child Components."

**Table 16–2** lists and describes the `gridCell` properties that appear on the Display Options tab in the Component Properties dialog.

<table>
<thead>
<tr>
<th>Layout Component</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><code>showDetailFrame</code></td>
<td>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 <code>showDetailFrame</code> components from one <code>panelCustomizable</code> component to another on the page. Note that a <code>showDetailFrame</code> must be included inside a <code>panelCustomizable</code> component for it to be movable. For more information, see Section 16.8, &quot;Setting showDetailFrame Properties.&quot;</td>
</tr>
<tr>
<td><code>sidebarItem</code></td>
<td>A child component of a tab set (<code>panelTabbed</code>). For more information, see Section 16.9, &quot;Setting sidebarItem Properties.&quot;</td>
</tr>
<tr>
<td><code>spacer</code></td>
<td>Provides a means of incorporating some blank space in pages so that the page appears less cluttered than it would if all the components were presented immediately next to each other or immediately below each other. For more information, see Section 16.10, &quot;Setting spacer Properties.&quot;</td>
</tr>
</tbody>
</table>

**See Also:** For information about accessing and setting properties on a component in Structure view, see Section 14.3.2.3, "Setting Component Properties in Structure View."
<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Column Span</td>
<td>Specifies the number of columns wide this cell will consume (see Width for columnSpan impact).</td>
</tr>
<tr>
<td>Halign</td>
<td>A means of expressing the horizontal alignment of component content. Choose from:</td>
</tr>
<tr>
<td></td>
<td>- <strong>start</strong>—Align content horizontally, starting from the starting position.</td>
</tr>
<tr>
<td></td>
<td>This is either left or right depending on whether the current context is localized for a left-reading or right-reading language.</td>
</tr>
<tr>
<td></td>
<td>- <strong>center</strong>—Align content horizontally, starting from the center. This option is not valid for cell content that uses unstable, percentage-based widths.</td>
</tr>
<tr>
<td></td>
<td>- <strong>end</strong>—Align content horizontally, starting from the ending position.</td>
</tr>
<tr>
<td></td>
<td>This is either right or left depending on whether the current context is localized for a left-reading or right-reading language.</td>
</tr>
<tr>
<td></td>
<td>- <strong>stretch</strong>—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.</td>
</tr>
<tr>
<td>Landmark</td>
<td>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:</td>
</tr>
<tr>
<td></td>
<td>- <strong>none</strong>—A content area that is not intended as a page navigational landmark.</td>
</tr>
<tr>
<td></td>
<td>- <strong>banner</strong>—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.</td>
</tr>
<tr>
<td></td>
<td>- <strong>complementary</strong>—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.</td>
</tr>
<tr>
<td></td>
<td>- <strong>contentinfo</strong>—A content area that contains information about the application, such as the copyright or privacy statement.</td>
</tr>
<tr>
<td></td>
<td>- <strong>main</strong>—The main content area of the page.</td>
</tr>
<tr>
<td></td>
<td>- <strong>navigation</strong>—A collection of navigational elements (usually links) for navigating the page or related pages.</td>
</tr>
<tr>
<td></td>
<td>- <strong>search</strong>—A content area that contains one or more widgets used to define and execute a search.</td>
</tr>
<tr>
<td>Margin End</td>
<td>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).</td>
</tr>
<tr>
<td>Margin Start</td>
<td>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).</td>
</tr>
<tr>
<td>Property</td>
<td>Description</td>
</tr>
<tr>
<td>--------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Row Span</td>
<td>Specifies the number of rows tall this cell will consume.</td>
</tr>
<tr>
<td>Short Desc</td>
<td>Specifies ALT text for the component. ALT text appears as a tooltip when users roll their mouse pointers over the component.</td>
</tr>
<tr>
<td>Valign</td>
<td>Specifies the vertical alignment for this cell's anchor point within the cell's coordinates. Choose from:</td>
</tr>
<tr>
<td></td>
<td>■ top—Content is aligned with the top of the cell.</td>
</tr>
<tr>
<td></td>
<td>■ middle—Content is aligned with the middle of the cell.</td>
</tr>
<tr>
<td></td>
<td>■ bottom—Content is aligned with the bottom of the cell.</td>
</tr>
<tr>
<td></td>
<td>■ 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.</td>
</tr>
<tr>
<td>Width</td>
<td>Specifies the width of the cell's column:.</td>
</tr>
<tr>
<td></td>
<td>■ dontCare—Allows other cells in this column define the width.</td>
</tr>
<tr>
<td></td>
<td>■ 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.</td>
</tr>
<tr>
<td></td>
<td>■ 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.</td>
</tr>
<tr>
<td></td>
<td>■ A % length—Uses a normalized fraction of the remaining panelGridLayout space not already used by the other columns (this may resolve to zero).</td>
</tr>
<tr>
<td>Other considerations:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>■ 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.</td>
</tr>
<tr>
<td></td>
<td>■ 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).</td>
</tr>
<tr>
<td></td>
<td>■ 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.</td>
</tr>
<tr>
<td>Show Component</td>
<td>An option for hiding or showing the component on the page.</td>
</tr>
<tr>
<td></td>
<td>■ Select to show the component.</td>
</tr>
<tr>
<td></td>
<td>■ Deselect to hide the component.</td>
</tr>
<tr>
<td></td>
<td>Once you hide a component in this way, any child components are also hidden. You can show the component again in Composer Structure view (see Section 12.4.1.3, &quot;About Structure View in Composer&quot;). In Structure view, right-click the hidden component, and select Show Component from the resulting context menu.</td>
</tr>
</tbody>
</table>

**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 the "Expression Language Expressions” appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.
16.3 Setting gridRow Properties

See Also: For information about accessing and setting properties on a component in Structure view, see Section 14.3.2.3, "Setting Component Properties 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.

Properties for the gridRow component include a Child Components tab with options for hiding, showing, and rearranging component content. For more information, see Section 14.3.5, "Working with Child Components."

Table 16–3 lists and describes the gridRow properties that appear on the Display Options tab in the Component Properties dialog.

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Height</strong></td>
<td>Specifies the row height. Valid values are:</td>
</tr>
<tr>
<td></td>
<td>■ auto—The browser draws the components in this row then the panelGridLayout component uses the heights of these components to adjust the layout accordingly.</td>
</tr>
<tr>
<td></td>
<td>■ 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.</td>
</tr>
<tr>
<td></td>
<td>■ 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.</td>
</tr>
<tr>
<td><strong>Margin Bottom</strong></td>
<td>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, pc (not auto nor %). The margin candidates are resolved using the largest value of the first unit type encountered (conflicting unit types are ignored).</td>
</tr>
<tr>
<td><strong>Margin Top</strong></td>
<td>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, pc (not auto nor %). The margin candidates are resolved using the largest value of the first unit type encountered (conflicting unit types will be ignored).</td>
</tr>
<tr>
<td><strong>Show Component</strong></td>
<td>An option for hiding or showing the component on the page.</td>
</tr>
<tr>
<td></td>
<td>■ Select to show the component.</td>
</tr>
<tr>
<td></td>
<td>■ Deselect to hide the component.</td>
</tr>
</tbody>
</table>

Once you hide a component in this way, any child components are also hidden. You can show the component again in Composer Structure view (see Section 12.4.1.3, "About Structure View in Composer"). In Structure view, right-click the hidden component, and select Show Component from the resulting context menu.

See Also: Display Options properties additionally provide access to an Expression Language (EL) editor, which you can use to enter and test EL values. If you need EL assistance, an application developer can provide an EL expression; see the "Expression Language Expressions" appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.
16.4 Setting panelGridLayout Properties

**See Also:** For information about accessing and setting properties on a component in Structure view, see Section 14.3.2.3, "Setting Component Properties 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 21–1, "Built-in Page Templates") to provide a powerful and concise way of defining a layout with the basic building blocks of panelGridLayout, gridRow, and gridCell.

Properties for the panelGridLayout component include a Child Components tab with options for hiding, showing, and rearranging component content. For more information, see Section 14.3.5, "Working with Child Components."

Table 16–4 lists and describes the panelGridLayout properties that appear on the Display Options tab in the Component Properties dialog.
Table 16–4  panelGridLayout Display Options

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dimensions From</td>
<td>Specifies the source of the dimensions applied to the component:</td>
</tr>
<tr>
<td></td>
<td>■ 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.</td>
</tr>
<tr>
<td></td>
<td>■ 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.</td>
</tr>
<tr>
<td></td>
<td>■ 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.</td>
</tr>
<tr>
<td>Default value</td>
<td>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.</td>
</tr>
<tr>
<td>Landmark</td>
<td>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.</td>
</tr>
<tr>
<td>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:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>■ none—A content area that is not intended as a page navigational landmark</td>
</tr>
<tr>
<td></td>
<td>■ 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.</td>
</tr>
<tr>
<td></td>
<td>■ 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</td>
</tr>
<tr>
<td></td>
<td>■ contentinfo—A content area that contains information about the application, such as the copyright or privacy statement.</td>
</tr>
<tr>
<td></td>
<td>■ main—The main content area of the page</td>
</tr>
<tr>
<td></td>
<td>■ navigation—A collection of navigational elements (usually links) for navigating the page or related pages.</td>
</tr>
<tr>
<td></td>
<td>■ search—A content area that contains one or more widgets used to define and execute a search.</td>
</tr>
<tr>
<td>Short Desc</td>
<td>A field for entering ALT text for the component. ALT text appears as a tooltip when users roll their mouse pointers over the component.</td>
</tr>
<tr>
<td>Show Component</td>
<td>An option for hiding or showing the component on the page.</td>
</tr>
<tr>
<td></td>
<td>■ Select to show the component</td>
</tr>
<tr>
<td></td>
<td>■ Deselect to hide the component</td>
</tr>
<tr>
<td>Once you hide a component in this way, any child components are also hidden. You can show the component again in Composer Structure view (see Section 12.4.1.3, “About Structure View in Composer”). In Structure view, right-click the hidden component, and select Show Component from the resulting context menu.</td>
<td></td>
</tr>
</tbody>
</table>
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 the "Expression Language Expressions" appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

16.5 Setting panelGroupLayout Properties

See Also: For information about accessing and setting properties on a component in Structure view, see Section 14.3.2.3, "Setting Component Properties 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. Properties for the panelGroupLayout component include a Child Components tab with options for hiding, showing, and rearranging component content. For more information, see Section 14.3.5, "Working with Child Components."

Table 16–5 lists and describes the panelGroupLayout properties that appear on the Display Options tab in the Component Properties dialog.
Table 16–5  panelGroupLayout Display Options

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
</table>
| 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. |
| 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. |
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 16–2).

### Table 16–5 (Cont.) panelGroupLayout Display Options

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Show Component</td>
<td>An option for hiding or showing the component on the page.</td>
</tr>
<tr>
<td></td>
<td>■ Select to show the component.</td>
</tr>
<tr>
<td></td>
<td>■ Deselect to hide the component.</td>
</tr>
<tr>
<td>Theme</td>
<td>The component style theme to apply to the children of this component.</td>
</tr>
<tr>
<td></td>
<td>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:</td>
</tr>
<tr>
<td></td>
<td>■ dark</td>
</tr>
<tr>
<td></td>
<td>■ medium</td>
</tr>
<tr>
<td></td>
<td>■ light</td>
</tr>
<tr>
<td>Valign</td>
<td>A means of expressing the vertical alignment of component content. Choose from:</td>
</tr>
<tr>
<td></td>
<td>■ middle—Content is aligned with the middle of the parent component.</td>
</tr>
<tr>
<td></td>
<td>■ top—Content is aligned with the top of the parent component.</td>
</tr>
<tr>
<td></td>
<td>■ bottom—Content is aligned with the bottom of the parent component.</td>
</tr>
<tr>
<td></td>
<td>■ baseline—Content is aligned with the baseline of the parent component.</td>
</tr>
</tbody>
</table>

**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 the "Expression Language Expressions" appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

### 16.6 Setting panelStretchLayout Properties

**See Also:** For information about accessing and setting properties on a component in Structure view, see Section 14.3.2.3, "Setting Component Properties 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.

Once you hide a component in this way, any child components are also hidden. You can show the component again in ComposerStructure view (see Section 12.4.1.3, "About Structure View in Composer"). In Structure view, right-click the hidden component, and select **Show Component** from the resulting context menu.

**Theme**

The component style theme to apply to the children of this component. Use this property to change the theme without causing associated skin changes. Application skins are the sources of the themes. Some skins may have no theme definitions.

Enter one of:

- dark
- medium
- light

No theme (none) is the default.

**Valign**

A means of expressing the vertical alignment of component content. 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.
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.

Table 16–6 lists and describes the `panelStretchLayout` properties that appear on the Display Options tab in the Component Properties dialog.

Note: All `panelStretchLayout` height and width facets take the value `auto`; however, using `auto` slows page performance.
### panelStretchLayout Display Options

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Bottom Height</strong></td>
<td>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.</td>
</tr>
</tbody>
</table>
| **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. 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. |
The panelTabbed layout component is the parent component of a tab or tab set. Its unique set of Display Options controls the behind-the-scenes method of tab creation, the source for the tabs dimensions, the tab’s position, and the like.

Table 16–7 lists and describes Display Options associated with the panelTabbed layout component.

### Table 16–6 (Cont.) panelStretchLayout Display Options

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Short Desc</td>
<td>A field for entering tooltip text for the component. The tooltip appears when users roll their mouse pointers over the component.</td>
</tr>
<tr>
<td>Show Component</td>
<td>An option for hiding or showing the component on the page.</td>
</tr>
<tr>
<td></td>
<td>■ Select to show the component.</td>
</tr>
<tr>
<td></td>
<td>■ Deselect to hide the component.</td>
</tr>
<tr>
<td></td>
<td>Once you hide a component in this way, any child components are also hidden. You can show the component again in ComposerStructure view (see Section 12.4.1.3, “About Structure View in Composer”). In Structure view, right-click the hidden component, and select Show Component from the resulting context menu.</td>
</tr>
<tr>
<td>Start Landmark</td>
<td>See the description for Bottom Landmark.</td>
</tr>
<tr>
<td>Start Width</td>
<td>The width of the start facet. Use any standard CSS unit of measure, such as pt, px, pc, li, and so on.</td>
</tr>
<tr>
<td>Theme</td>
<td>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:</td>
</tr>
<tr>
<td></td>
<td>■ dark</td>
</tr>
<tr>
<td></td>
<td>■ medium</td>
</tr>
<tr>
<td></td>
<td>■ light</td>
</tr>
<tr>
<td></td>
<td>No theme (none) is the default.</td>
</tr>
<tr>
<td>Top Height</td>
<td>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.</td>
</tr>
<tr>
<td>Top Landmark</td>
<td>See the description for Bottom Landmark.</td>
</tr>
</tbody>
</table>

**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 the "Expression Language Expressions" appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

### 16.7 Setting panelTabbed Properties

**See Also:** For information about accessing and setting properties on a component in Structure view, see Section 14.3.2.3, “Setting Component Properties 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.

Table 16–7 lists and describes Display Options associated with the panelTabbed layout component.
### Table 16–7  panelTabbed Display Options

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Child Creation</td>
<td>Specifies when tabs are created:</td>
</tr>
<tr>
<td></td>
<td>■ 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.</td>
</tr>
<tr>
<td></td>
<td>■ 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.</td>
</tr>
<tr>
<td></td>
<td>■ 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.</td>
</tr>
<tr>
<td>Content Delivery</td>
<td>Specifies when tab content is rendered:</td>
</tr>
<tr>
<td></td>
<td>■ 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.</td>
</tr>
<tr>
<td></td>
<td>■ 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.</td>
</tr>
<tr>
<td>Dimensions From</td>
<td>Specifies the source of the dimensions applied to the component:</td>
</tr>
<tr>
<td></td>
<td>■ 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.</td>
</tr>
<tr>
<td></td>
<td>■ disclosedChild—The dimension is taken from the currently active tab.</td>
</tr>
<tr>
<td></td>
<td>■ 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.</td>
</tr>
<tr>
<td>Position</td>
<td>The position of the tab portion of the panelTabbed:</td>
</tr>
<tr>
<td></td>
<td>■ above—(default) Tabs are shown above the tab content area.</td>
</tr>
<tr>
<td></td>
<td>■ below—Tabs are shown below the tab content area.</td>
</tr>
<tr>
<td></td>
<td>■ both—Tabs are shown above and below the tab content area.</td>
</tr>
<tr>
<td></td>
<td>In accessibility screen reader mode, the tab position is always above.</td>
</tr>
</tbody>
</table>
### Table 16–7 (Cont.) panelTabbed Display Options

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Short Desc</td>
<td>A field for entering tooltip text for the component. The tooltip appears when users roll their mouse pointers over the component.</td>
</tr>
<tr>
<td>Show Component</td>
<td>An option for hiding or showing the component on the page.</td>
</tr>
<tr>
<td></td>
<td>■ Select to show the component.</td>
</tr>
<tr>
<td></td>
<td>■ Deselect to hide the component.</td>
</tr>
<tr>
<td>Tab Removal</td>
<td>Specifies whether some, none, or all tabs can be removed:</td>
</tr>
<tr>
<td></td>
<td>■ none—Tabs cannot be deleted from the tab set.</td>
</tr>
<tr>
<td></td>
<td>■ all—All tabs can be deleted from the tab set.</td>
</tr>
<tr>
<td></td>
<td>■ allExceptLast—All but one the last tab can be deleted from the tab set.</td>
</tr>
</tbody>
</table>
|                   | **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:** For information about working with tabs, see Section 12.4.6, "Creating Layered Content Regions Using Tabs."

### 16.8 Setting showDetailFrame Properties

**See Also:** For information about accessing and setting properties on a component in Structure view, see Section 14.3.2.3, "Setting Component Properties 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.
The Display Options associated with `showDetailFrame` are common to many other types of components and are listed in *Table 14–1, "Display Options Properties"* with one exception: the `showDetailFrame` layout component does not expose the property `Allow Child Selection`. Refer to *Table 14–1, "Display Options Properties"* for recommendations related to `Allow Resize` on the `showDetailFrame` layout component.

Display Options for `showDetailFrame` are presented on two subtabs: **Basic** and **Advanced** (*Figure 16–3*).

*Figure 16–3  Basic and Advanced Display Options*

16.9 Setting `sidebarItem` Properties

**See Also:** For information about accessing and setting properties on a component in Structure view, see *Section 14.3.2.3, "Setting Component Properties in Structure View."

The `sidebarItem` component is a child component of `panelTabbed` (see *Section 16.7, "Setting panelTabbed Properties"*). Unlike `panelTabbed`, which provides all of the properties associated with a tab set, `sidebarItem` provides all of the properties associated with a single tab.

*Table 16–8* describes the `sidebarItem` properties that appear on the **Display Options** tab in the Component Properties dialog.
16.10 Setting spacer Properties

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.

Table 16–9 lists and describes the spacer properties that appear on the Display Options tab in the Component Properties dialog.
You can work with layout components in Structure view of the page editor (Composer), which provides a combined WYSIWYG and hierarchical rendering of page components. Structure view displays when editing system pages (see Chapter 8, "Customizing System Pages for a Portal"). For conceptual information about the different types of pages in WebCenter Portal, see Section 1.3.7, "What Are Pages?"
This chapter provides an overview of OmniPortlet and explains the user interface elements associated with OmniPortlet.

This chapter includes the following topics:

- About OmniPortlet
- Adding an OmniPortlet Instance to a Page
- Working with the OmniPortlet Wizard
- Working with OmniPortlet Parameters
- Setting OmniPortlet Properties
- Troubleshooting OmniPortlet

Permissions: To perform the tasks in this chapter, you need the portal-level permission Basic Services: Edit Page Access, Structure, and Content (standard permissions) or the Pages: Edit Pages (advanced permissions). A portal moderator has this permission by default.

For more information about permissions, see Section 29.1, "About Roles and Permissions for a Portal."

17.1 About OmniPortlet

OmniPortlet is a component of WebCenter Portal that enables developers to easily publish data from various data sources using a variety of layouts without writing any code. You can base an OmniPortlet on almost any kind of data source, including web services, SQL databases, spreadsheets (that is, files with character-separated values), XML, and even application data from existing web pages.

Note: If your data source is a spreadsheet, the spreadsheet must be unsecured or must require only HTTP authentication; SSO authentication is not supported.

Additionally, OmniPortlet enables you to:

- Sort the data to display
- Format data using a variety of layouts, including a customized layout
- Use portlet parameters
Expose personalizable settings to page viewers

To display personalized data, you can refine the results returned from a data source and parameterize the credential information used to access secure data. Out of the box, OmniPortlet provides the most common layout for portlets: tabular, chart, news, bulleted list, form, HTML, and parameter form.

---

**Note:** For more information about developing different types of portlets and information about producers and other portlet technologies, see *Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper*.

17.2 Adding an OmniPortlet Instance to a Page

In WebCenter Portal, if you have sufficient privileges, you can add an OmniPortlet instance to a page in the same way that you would add any other resource catalog component. For information, see Chapter 14, "Working with Resource Catalog Components on a Page."

---

**Note:** In WebCenter Portal, avoid adding an OmniPortlet instance to a Movable Box component (For information, see Section 15.9, "Working with the Movable Box Component"). The Movable Box component duplicates the showDetailFrame that the portlet provides by default. Adding a portlet to a Movable Box creates an unnecessary and potentially error-prone redundancy.

When you add an instance of OmniPortlet to a page, access the portlet's Component Properties dialog and ensure that the *Render Portlet In I Frame* property is set to *true*. This displays the OmniPortlet in its own inline frame (*iframe*) in View mode. For information about the Component Properties dialog, see Section 17.5, "Setting OmniPortlet Properties."

---

**Note:** If OmniPortlet is not available in the resource catalog, it could be that it has not yet been registered with WebCenter Portal. Your system administrator must register the OmniPortlet portlet producer, as described in the "Registering an Oracle PDK-Java Portlet Producer in WebCenter Portal" section in *Administering Oracle WebCenter Portal*.

17.3 Working with the OmniPortlet Wizard

This section includes the following topics:

- Section 17.3.1, "Accessing the OmniPortlet Wizard"
- Section 17.3.2, "Selecting the Data Source Type"
- Section 17.3.3, "Identifying the Data Source"
- Section 17.3.4, "Setting Filtering Options"
- Section 17.3.5, "Setting View Options"
- Section 17.3.6, "Setting Layout Options"
- Section 17.3.7, "Customizing Your OmniPortlet"
17.3.1 Accessing the OmniPortlet Wizard

Once you add an instance of OmniPortlet to your page, click the Customize link to start the OmniPortlet wizard.

The OmniPortlet wizard initially contains five steps:

1. Select a data source type.
   
   This step provides your data source options. It displays only in the initial definition of the portlet, and is not available when customizing the portlet defaults.
   
   For more information, see Section 17.3.2, "Selecting the Data Source Type."

2. Identify the data source.
   
   This step provides options for configuring the data source connection, such as the URL of the web service you want to use. You can change these options later when editing the portlet defaults.
   
   For more information, see Section 17.3.3, "Identifying the Data Source."

   **Note:** If your data source is a spreadsheet, the spreadsheet must be unsecured or must require only HTTP authentication; SSO authentication is not supported.

3. Set filtering options.
   
   This step provides sorting options at the application level to enable you to refine your results. You can change these options later when editing the portlet defaults.
   
   For more information, see Section 17.3.4, "Setting Filtering Options."

4. Set view options.
   
   This step provides options for displaying portlet header and footer text, the layout style, and caching. You can change these options later when editing the portlet defaults.
   
   For more information, see Section 17.3.5, "Setting View Options."

5. Set layout options.
   
   This step provides detailed options for customizing the layout of content retrieved from the data source. You can change these options later when editing the portlet defaults.
   
   For more information, see Section 17.3.6, "Setting Layout Options."

Once you complete these steps, you are done. If you want to change your initial values, you can reenter the wizard by selecting the Customize option from the portlet’s Actions menu. Tabs representing the steps you took to set up OmniPortlet display. Although the data type cannot be changed, you can revise values on the Source, Filter, View, and Layout tabs.
17.3.2 Selecting the Data Source Type

When you first start OmniPortlet, the Type step displays (Figure 17–1).

*Figure 17–1  Type Tab of the OmniPortlet Wizard*

Use the **Type** step to identify the type of data to display in your OmniPortlet instance. OmniPortlet supports the following data types out of the box:

- **Spreadsheet**—Displays data from a text file containing character-separated values (CSV).
- **SQL**
- **XML**
- **Web Service**
- **Web Page**—Use existing web content as a source of data

**Note:** If your data source is a spreadsheet, the spreadsheet must be unsecured or must require only HTTP authentication; SSO authentication is not supported.

- **SQL**—Displays data from a database using SQL.
- **XML**—Displays data from an XML file.
- **Web Service**—Displays data from a discrete business service that can be accessed over the Internet using standard protocols.
- **Web Page**—Displays data based on existing web content.
After you complete the OmniPortlet wizard, you cannot change the data source type.

17.3.3 Identifying the Data Source

Once you choose a data type, you are ready to identify a data source. The Source tab renders according to the data type you selected in the Type step. That is, the options that display on the Source tab vary according to the selected data type.

Additionally, if the OmniPortlet producer has been configured to use a proxy server requiring authentication, the Source tab contains a Proxy Authentication section and a Connection section where you can provide the necessary information for connecting to the data source.

This section contains information about the settings common to all Source tabs, including settings specific to the selected data type. It includes the following subsections:

- Section 17.3.3.1, "Proxy Authentication"
- Section 17.3.3.2, "Connection and Portlet Parameters"
- Section 17.3.3.3, "Spreadsheet"
- Section 17.3.3.4, "SQL"
- Section 17.3.3.5, "XML"
- Section 17.3.3.6, "Web Service"
- Section 17.3.3.7, "Web Page"

17.3.3.1 Proxy Authentication

If the OmniPortlet producer was set up at design time to use proxy authentication that requires login credentials, then a Proxy Authentication section displays on the Source tab where you can enter this information.

OmniPortlet’s support for proxy authentication includes support for global proxy authentication and authentication for each user, which means you can specify a login scenario for your OmniPortlet instance:

- All users automatically log in using a user name and password you provide.
- Each user logs in using an individual user name and password.
- All users log in using the same specified user name and password.

The Proxy Authentication section displays only for the following data types, and only when the specific data source requires a proxy server for access:

- CSV (character-separated values)
- XML
- Web Page
Notes: Configuring an OmniPortlet producer is a design-time activity applicable to Portal Framework applications. For more information about configuring the OmniPortlet producer to use proxy authentication, see the WebCenter Portal Framework online Help topic that displays when you click Help on the Edit Producers: OmniPortlet Producer page.

If the OmniPortlet producer is configured to require login for all users, then each user must set his or her own proxy login information at runtime as follows:

- For page designers, set this on the Customize: Source tab.
- For page viewers, set this on the Personalize page.

To access the Customize: Source tab, click the Customize link on the portlet’s Actions menu. To access the Personalize page, click the Personalize link on the portlet’s Actions menu.

If you are using the Web Page data source, then the Proxy Authentication section displays in the Web Clipping Studio when you click the Select Web Page button on the Source tab.

For more information about Web Clipping Studio, see Chapter 18, "Working with the Web Clipping Portlet."

17.3.3.2 Connection and Portlet Parameters

For each data source—except the Web Page data source—the Source step contains a Connection section, where you can define connection information for accessing secured data. The Source step for all data sources includes a Portlet Parameters section, where you can define portlet parameters (Figure 17–2).

Figure 17–2  Source Tab: Connection and Portlet Parameters Sections

<table>
<thead>
<tr>
<th>Parameter Name</th>
<th>Default Value</th>
<th>Personalizable</th>
<th>Personalize Page Label</th>
<th>Personalize Page Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Param1</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Param2</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Param3</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Param4</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Param5</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Note: You can use the format ##ParamN## (for example, ##Param1##) for Username, Password, or Connection String. The Test button returns an error, however, even though the connection information is correct when parameter values are substituted.

Once you define the portlet parameters, you can map them to page parameters. For more information, see Section 17.4, "Working with OmniPortlet Parameters" and
Chapter 19, "Wiring Pages, Task Flows, Portlets, and ADF Components."

To edit the connection information, click the **Edit Connection** button to open the **Connection Information** page (Figure 17–3).

**Figure 17–3  OmniPortlet Connection Information Page for a SQL Data Source**

On the **Connection Information** page, you can enter a name for the connection information, and also the user name and password. For a SQL data source, you can also enter information to specify the driver you want to use to connect to the data source. For more information, see Section 17.3.3.4, "SQL."

---

**Note:** For more information about the **Connection Information** page, click **Help** on the **Source** tab of the OmniPortlet wizard.

---

17.3.3.3 Spreadsheet

Spreadsheets are a common method of storing small data sets. OmniPortlet enables you to share spreadsheets by supporting character-separated values (CSV) as a data source. Use the **Source** tab to specify the location of the CSV file (Figure 17–4).
If the file is located on a secure server, then you can specify the connection information in the **Connection Information** section illustrated in Figure 17–3. You can select the character set to use when WebCenter Suite reads the file, and also the delimiter and text qualifier.

**Note:**

- As the OmniPortlet producer exists and executes in a tier different from the Portal Framework application and does not have access to the session information, you must expose CSV files as PUBLIC for OmniPortlet to be able to access them.
- The CSV file must be unsecured or must require only HTTP authentication; SSO authentication is not supported.

### 17.3.3.4 SQL

A relational database is the most common place to store data. OmniPortlet enables you to use standard JDBC drivers and provides out-of-the-box access to Oracle and any other JDBC database. You can specify the driver type when you configure the connection information.

Figure 17–5 shows the **Source** tab for a SQL data source.
You can use DataDirect JDBC drivers to access other relational databases. To do so, you must configure OmniPortlet to recognize the driver. This is a design-time activity, typically carried out by an application developer.

See Also:

- For information about configuring OmniPortlet to use DataDirect drivers, see the "Configuring the OmniPortlet Producer to Access Other Relational Databases" section in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.
- For more information about DataDirect drivers, see the Certification Matrix for Oracle Application Server and DataDirect JDBC on the Oracle Technology Network (OTN) at http://www.oracle.com/technetwork.

Once the driver is installed, it displays in the Driver Name drop-down list on the Connection Information page (Figure 17–6).
For Oracle-thin drivers, enter the value in the **Connection String** using the format
\texttt{host\_name:port:SID}. If you enter a connection string for a DataDirect driver, keep in
mind that you must enter a value in the **Connection String** field using the syntax:
\texttt{host\_name:port}. The \texttt{host\_name} is the name of the server where the database is
running. The \texttt{port} is the database’s listening port.

### 17.3.3.5 XML

You can access XML data sources across an intranet or the Internet. On the **Source** tab,
you can specify the URL of the XML file that contains your data (Figure 17–7).

**Figure 17–7 Source Tab: XML**

**XML**

**XML URL**

\texttt{/htdocs/omniPortlet/sampleData/departments.xml}

**Optionally enter an XSL filter to transform the data**

This is useful when the data is not in \texttt{<ROWSET/>/\texttt{<ROW}>} format.

**XSL Filter URL**

**Optionally enter an XML Schema to describe the data**

This is useful when your XML data doesn’t have data for all fields, or to override what is defined in
the XML data.

**XML Schema URL**
Use the **Test** buttons next to the **XML URL** and the **XSL Filter URL** fields to validate your XML data source and the XSL filter.

The specified XML file can be in a tabular (ROWSET/ROW) structure, or you can provide an XML Style Sheet (XSL) that transforms data into the ROWSET/ROW structure. **Example 17–1** provides an illustration of the ROWSET/ROW structure of an XML data source.

**Example 17–1  ROWSET/ROW Structure of an XML Data Source**

```xml
<Team>
  <Employee>
    <DEPTNO>10</DEPTNO>
    <ENAME>KING</ENAME>
    <JOB>PRESIDENT</JOB>
    <SAL>5000</SAL>
  </Employee>
  <DEPTNO>20</DEPTNO>
  <ENAME>SCOTT</ENAME>
  <JOB>ANALYST</JOB>
  <SAL>3000</SAL>
  <Employee/>
</Team>
```

In **Example 17–1**, the `<TEAM>` tags delineate the rowset, and the `<EMPLOYEE>` tags delineate the rows.

Regardless of the format of the XML file, OmniPortlet automatically inspects the XML to determine the column names, which are then used to define the layout. If you want to specify this information yourself, you can supply a URL to an XML schema that describes the data.

If the XML file is located on a secured server protected by HTTP Basic Authentication, you can specify connection information on the **Connection Information** page.

---

**Note:** Because the OmniPortlet producer exists and executes in a tier different from the Portal Framework application and does not have access to the session information, you must expose XML files as PUBLIC in order for OmniPortlet to access them.

---

### 17.3.3.6 Web Service

A web service is a discrete business service that can be programatically accessed over the Internet using standard protocols, such as SOAP and HTTP. Web services are specific to neither platform nor language and are typically registered with a web service broker. When you find a web service you want to use, you must obtain the URL to the Web Service Description Language (WSDL) file. The WSDL file describes the web service and specifies the methods that can be called, including the expected parameters. It also describes the returned data.

OmniPortlet supports both types of web services: Document and Remote Procedure Calls (RPC). After a WSDL document/file is supplied, it is parsed, and the available methods that can be called display on the **Source** tab.

Similar to the XML data source, OmniPortlet expects the web service data in ROWSET/ROW format, though you can also use an XSL file to transform the data. OmniPortlet expects the WSDL document/file to determine the column names, though you may also specify an XML schema to describe the returned data set.
Figure 17–8 shows the **Source** tab for a sample web service.

**Figure 17–8  Source Tab: Web Service**

<table>
<thead>
<tr>
<th>Define your OmniPortlet</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Type</strong></td>
</tr>
<tr>
<td>&lt;Previous</td>
</tr>
</tbody>
</table>

**Web Service**

![WSDL and Web Service Diagram]

**Web Service Methods**

Available methods for this Web Service

- This method does not take any parameters.

**TIP** You can use the format `##Param1##` (ex: `##Param1##`) to pass data from the page into the method parameters. *Learn more...*

**Optionally enter an XSL filter to transform the method output**

This is useful when the data is not in `<ROWSET>/<ROW>` format.

<table>
<thead>
<tr>
<th>XSL Filter URL</th>
</tr>
</thead>
</table>

**Optionally enter an XML Schema to describe the method output**

This is useful when the XML data doesn’t have data for all fields or to override what is defined in the XML data.

<table>
<thead>
<tr>
<th>XML Schema URL</th>
</tr>
</thead>
</table>

### 17.3.3.7 Web Page

**Note:** The Web Clipping portlet is deprecated in Release 11g (11.1.1.7.0). Consider using a clipper pagelet using Oracle WebCenter Portal’s Pagelet Producer’s Pagelet Producer. For more information, see the “Managing the Pagelet Producer” chapter in *Administering Oracle WebCenter Portal*.
OmniPortlet enables you to use existing web content as a data source. It integrates the Web Clipping portlet's Web Clipping Studio to provide a means of clipping and rendering web content within the context of an OmniPortlet instance.

OmniPortlet's Web Page data source extends the scope offered by the Web Clipping portlet to include scraping functionality. Additional features include:

- **Navigation through various login mechanisms**, including form- and JavaScript-based submission, and HTTP Basic and Digest Authentication with cookie-based session management.

- **Fuzzy matching of clippings**. If a web clipping gets reordered within the source page or if its character font, size, or style changes, then it is still identified correctly by the web page data source and delivered as the portlet content.

- **Reuse of a wide range of web content**, including basic support of pages written with HTML 4.0.1 and JavaScript, retrieved through HTTP GET and POST (form submission).

By default, all web clipping definitions are stored persistently in Oracle Metadata Services (MDS). However, you can also use an Oracle database. Using MDS does not require any changes in the configuration files. If you use an Oracle database as the Web Clipping repository, then at design time you must update the `provider.xml` file.

Any secure information, such as passwords, is stored in encrypted form, according to the Data Encryption Standard (DES), using Oracle Database encryption technology.

When **Web Page** is selected as the data type, the OmniPortlet wizard's **Source** tab (Figure 17–9) includes a **Select Web Page** button that launches Web Clipping Studio.
Within Web Clipping Studio, the Oracle Application Server Web Clipping online Help becomes available through the Help icon at the top of the page. You can use the Help to navigate your way through the process of sectioning and saving web content.

**Note:** For more information about using the Web Clipping Studio or clipping content for a Web Clipping Portlet, see Chapter 18, "Working with the Web Clipping Portlet."

### 17.3.4 Setting Filtering Options

Once you have selected the data source and specified the data source options, you can further refine your data using OmniPortlet's filtering options. To use filtering efficiently, it is better to refine the data as much as possible at the data source level on the **Source** tab, then use the options on the **Filter** tab to streamline the data. For example, if you are using a SQL data source, then you could use a `WHERE` clause to return only specific data from the specified columns. In this case, you could skip the **Filter** tab and continue to the wizard's **View** tab. However, if there are no filtering options at the data source level, then you can use the options on the **Filter** tab to sort your data (Figure 17–10).
17.3.5 Setting View Options

Once you have specified and filtered the data, you are ready to choose view and layout options for your OmniPortlet. The **View** tab (Figure 17–11) provides options for adding header and footer text, enabling caching, and choosing a layout style that you can later refine on the **Layout** tab.
**Figure 17–11  View Tab**

**Define your OmniPortlet**

On the View tab, you can select from the following layouts:

- Tabular
- Chart
- News
- Bullet

**Header and Footer Text**

- **Title**: OmniPortlet
- **Header Text**: 
- **Show Header Text**: check box
- **Footer Text**: 
- **Show Footer Text**: check box

**Tip** You can use the format `###Param####` (ex: `###Param1###`) to pass data from the page into the text. [Learn more...](#)

**Layout Style**

Select a layout for the portlet data.

- **Tabular**
- **Chart**
- **News**
- **Bullet**
- **Form**
- **HTML**
- **Parameter Form**

**Data View**

<table>
<thead>
<tr>
<th>Sample Data.</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Column1</strong></td>
<td><strong>Column2</strong></td>
<td><strong>Column3</strong></td>
</tr>
<tr>
<td>Kathleen Bayya</td>
<td>President - Manufacturing</td>
<td>100000</td>
</tr>
<tr>
<td>Robert Rodriguez</td>
<td>President - Sales</td>
<td>100000</td>
</tr>
<tr>
<td>Edward Shields</td>
<td>Chief Financial Officer</td>
<td>100000</td>
</tr>
<tr>
<td>Jan Francois Stewart</td>
<td>Graphic Artist</td>
<td>36000</td>
</tr>
<tr>
<td>Lisa Williams</td>
<td>Graphic Artist</td>
<td>36000</td>
</tr>
<tr>
<td>Sandra Kyte</td>
<td>Course Developer</td>
<td>54000</td>
</tr>
<tr>
<td>Eaulo Yau</td>
<td>Customer Sales Representative</td>
<td>39000</td>
</tr>
</tbody>
</table>

**Caching**

If page level caching is not used, then the page will always have to wait for this portlet to generate if the portlet is not cached. This can adversely effect page performance.

- **Cache the Portlet Content for**: 60 minutes
- **Don't Cache the Portlet Content**

On the View tab, you can select from the following layouts:
17.3.6 Setting Layout Options

The **Layout** tab enables you to further customize the appearance of your OmniPortlet. The options on the **Layout** tab change according to your selection on the **View** tab. For example, when you select **Chart Layout**, options are provided for setting up chart hyperlinks. With chart hyperlinks, clicking a specific part of the chart triggers an event (for example, navigation to another URL).

For the other layout styles, you can define each column to display in a specific format, such as plain text, HTML, an image, a button, or a field. For example, suppose you selected a data source that includes a URL to an image. To see this image, you can select **Image** for the display of this column. Each column can also be mapped to an action, similar to the behavior of chart hyperlinks.

This section includes the following subsections that provide more detail about the layout options available on the OmniPortlet **Layout** tab:

- Section 17.3.6.1, "Tabular Layout"
- Section 17.3.6.2, "Chart Layout"
- Section 17.3.6.3, "News Layout"
- Section 17.3.6.4, "Bullet Layout"
- Section 17.3.6.5, "Form Layout"
- Section 17.3.6.6, "HTML Layout"
- Section 17.3.6.7, "Parameter Form Layout"

**Note:** Because events are not currently supported, selecting an action when designing your layout may produce unexpected results.

### 17.3.6.1 Tabular Layout

Typically, you use tabular layout when you have one or more columns of data to display in a table. You can select **Plain** to display all rows in the table without any background color, or **Alternating** to display a background color for every other row in the table *(Figure 17–12).*
Figure 17–12  Layout Tab: Tabular

The Column Layout section provides options for selecting the data columns to display in the portlet and a display format. Additionally, you can associate a URL with a column to display column data as a hyperlink. You can also specify whether the secondary web page displays in a new window. Figure 17–13 shows an example of an OmniPortlet using a tabular format.

Figure 17–13  Example of an OmniPortlet Using a Tabular Layout

Note: You can control the background color of a portlet using its style properties. Portlet style properties are exposed through the Properties panel in Composer. For more information, refer to Section 17.5, "Setting OmniPortlet Properties."

The Column Layout section provides options for selecting the data columns to display in the portlet and a display format. Additionally, you can associate a URL with a column to display column data as a hyperlink. You can also specify whether the secondary web page displays in a new window. Figure 17–13 shows an example of an OmniPortlet using a tabular format.

Note: For more information about using the OmniPortlet wizard, click the Help link on the Layout tab.
17.3.6.2 Chart Layout

Use the chart layout to display your data graphically, as a bar, pie, or line chart. The Layout tab (Figure 17–14) provides options for specifying the chart style to use (Chart Style) and the data source columns to display (Column Layout).

Figure 17–14  Layout Tab: Chart

Under the Column Layout section, you can select the data source columns to use in the chart (Group); the values to use in creating the chart legend (Category); and the relative size of the chart's bars, lines, or pie slices (Value).

Note: To group the information in the chart, you must group the information at the data level (for example, in your SQL query statement). Also, if numeric values in a data source contain formatted strings, commas, or currency (for example, $32,789.00), then they are considered to be text and ignored when the chart is generated. You should remove these formatting characters if you want them to be correctly read as numeric values.

You can also select whether the sections of the chart should point to a hyperlink and whether the link target should display in a new window.
You can define chart hyperlinks so that each bar, pie section, or line links to another web page. For example, you can place a pie chart and a report portlet on your page, then set up hyperlinks on the pie wedges. Users click a wedge to display a row in the report with detailed information about the wedge data.

Figure 17–15 displays an example of a pie chart. In this example, the Category value DEPARTMENT is used as the chart legend.

**Figure 17–15  Example of an OmniPortlet Using a Pie Chart Layout**

17.3.6.3 News Layout

Use the News layout to display links to articles and brief article descriptions. You can use the News layout to publish information in standard XML formats, such as Resource Description Framework (RDF) or RSS (Really Simple Syndication).

Use the Column Layout section (Figure 17–16) to add a heading that displays at the top of the portlet, a logo, or a scrolling layout that enables users to view all the information in the portlet as it moves vertically.
Figure 17–16  Layout Tab: News

The Layout tab also provides options for associating a URL with column data. Users click column data in the portlet to navigate to your specified target location. Figure 17–17 shows an example OmniPortlet using a News layout.

**Note:** The OmniPortlet News Layout Scroll type is supported on Microsoft Internet Explorer and Netscape 7.0.
17.3.6.4 Bullet Layout

Use the Bullet layout to display your data in a bulleted or numbered list. The Layout tab (Figure 17–18) provides a variety of different bullet and numbering styles.
Figure 17–18  Layout Tab: Bullet

In the Column Layout section, you can select how the columns display in the portlet and associate a URL with column data.

Figure 17–19 shows an example of an OmniPortlet using a Bullet layout.
17.3.6.5 Form Layout

**Figure 17–20 Layout Tab: Form**

Use the Form layout when you want to display source data in a form with labeled fields, such as **Name**: `<name>`. You can then use portlet parameters to determine the data that displays.

Use the **Column Label** column to enter row labels and the **Column** column to specify which column to use from your data source. Additionally, you can specify data alignment, select a display mode (text, HTML, image, button, field, or hidden), associate a URL or an event with the column data, and specify whether to open the URL target in a new window.

**Figure 17–21** shows an example of an OmniPortlet using a Form layout.
17.3.6.6 HTML Layout
Use the HTML layout to create a customized look and feel for your OmniPortlet content. The Layout tab (Figure 17–22) provides a means of selecting a built-in HTML layout and modifying the code, or creating a new layout.

Note: For more information about using the OmniPortlet wizard, click the Help link in the upper right corner of the Layout tab.
You can hand-code your own HTML or JavaScript based on data columns that OmniPortlet has retrieved from the selected data source. By coding your own HTML and JavaScript, you have full control over the portlet’s appearance, enabling you to develop a rich portlet interface.

For more information about using the fields on the Layout tab, click the Help button in the wizard. For an example of using JavaScript in the HTML layout, select the Sortable Table layout from the Quick Start drop-down list on this tab.

Note: The maximum number of characters you can enter in each of the sections (Heading, Repeating, and Footer) is 30,000 (30k).

Figure 17–23 shows an example of an OmniPortlet using the HTML layout.
Figure 17–23  Example of an OmniPortlet Using the HTML Layout

<table>
<thead>
<tr>
<th>Emp ID</th>
<th>Name</th>
<th>Job</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>20</td>
<td>Kathleen Bayyat</td>
<td>President - Manufacturing</td>
<td><a href="mailto:kbayyat@mycompany.com">kbayyat@mycompany.com</a></td>
</tr>
<tr>
<td>30</td>
<td>Robert Rodriguz</td>
<td>President - Sales</td>
<td><a href="mailto:rrodriguz@mycompany.com">rrodriguz@mycompany.com</a></td>
</tr>
<tr>
<td>40</td>
<td>Edward Shields</td>
<td>Chief Financial Officer</td>
<td><a href="mailto:eshields@mycompany.com">eshields@mycompany.com</a></td>
</tr>
<tr>
<td>110</td>
<td>Jan Francois Stewart</td>
<td>Graphic Artist</td>
<td><a href="mailto:jfrancois@mycompany.com">jfrancois@mycompany.com</a></td>
</tr>
<tr>
<td>100</td>
<td>Lisa Williams</td>
<td>Graphic Artist</td>
<td><a href="mailto:lwilliams@mycompany.com">lwilliams@mycompany.com</a></td>
</tr>
<tr>
<td>430</td>
<td>Sandra Kyte</td>
<td>Course Developer</td>
<td><a href="mailto:skyte@mycompany.com">skyte@mycompany.com</a></td>
</tr>
<tr>
<td>770</td>
<td>Eauo Yau</td>
<td>Customer Sales Representative</td>
<td><a href="mailto:eyau@mycompany.com">eyau@mycompany.com</a></td>
</tr>
</tbody>
</table>

17.3.6.7 Parameter Form Layout

Use the Parameter Form layout to create a customized parameter form for your OmniPortlet content. The Layout tab (Figure 17–24) provides a means of selecting a built-in parameter form layout and modifying the code, or creating a new layout.
You can hand-code your own parameter form based on data columns that OmniPortlet has retrieved from the selected data source. By coding your own parameter form, you have full control over the portlet's appearance, enabling you to develop a rich portlet interface. To do so, select the Custom style option, then use the Custom HTML field to edit the parameter form (Figure 17–25).
Working with OmniPortlet Parameters

17.3.7 Customizing Your OmniPortlet

After you have created your OmniPortlet and returned to your portal, you can select the Customize option from the portlet’s Actions menu to revise your original selections. When you revise a defined OmniPortlet, tabs correspond to the different steps originally presented in the OmniPortlet wizard. An exception to this is the Type step—you cannot change the originally selected data type, and so there is no corresponding Type tab.

When you revise an OmniPortlet using customize mode, keep in mind the following notes:

- Any modifications you make to your portlet using customize mode apply to all users, regardless of the current session language and the locale of the user’s browser.
- You can personalize the portlet at runtime by clicking the Personalize link on the portlet or by selecting the Personalize option on the portlet’s Action menu. Personalizing the portlet creates a copy of the personalization object. As all properties are duplicated, subsequently modifying the portlet through Customize mode does not affect the personalized version of the portlet. To ensure the latest customizations are made to the portlet, after you make modifications in Customize mode, you must click Personalize again, and then select the Reset to Defaults option.
- The personalization of OmniPortlet is stored in a file-preference store. For more information about configuring OmniPortlet and modifying the preference store, see the “Configuring Portal Tools and Web Producers (Optional)” section in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

17.4 Working with OmniPortlet Parameters

You can define up to five portlet parameters for an OmniPortlet. You can define parameters in the following screens:

- On the Source screen of the wizard when you define the OmniPortlet
- On the Source tab when you select Customize for a defined OmniPortlet

Figure 17–26 shows the Portlet Parameters section on the Source tab.
If you select any of these portlet parameters to be personalizable (by selecting the Personalizable check box), you can set their values on the Personalize screen.

**Note:** You can learn more about portlet parameters in the online Help, which you can access by clicking the Help link on the Source tab in the OmniPortlet wizard. The online Help describes portlet parameters in detail, and how to set them up for your OmniPortlet.

Once you have set up portlet parameters in your OmniPortlet, you can contextually map the portlet to other portlets or components on a page. For more information about doing so, see Chapter 19, "Wiring Pages, Task Flows, Portlets, and ADF Components."

### 17.5 Setting OmniPortlet Properties

OmniPortlet has associated properties that users with sufficient privileges can access through the Component Properties dialog in Composer (Figure 17–27).
For information about accessing the Component Properties dialog, see Section 14.3.2, "Setting Properties on a Component."

The following sections provide information about OmniPortlet properties:

- Section 17.5.1, "About OmniPortlet Properties"
- Section 17.5.2, "OmniPortlet Properties"

### 17.5.1 About OmniPortlet Properties

The properties on the Parameters and Display Options tabs of the Component Properties dialog control the default OmniPortlet content. For descriptions of the properties on these tabs, see Section 17.5.2, "OmniPortlet Properties."

Changes to the common properties on the Display Options, Style, and Content Style tabs affect the appearance and behavior of OmniPortlet. For more information about the properties that are common to all task flows, see Section 14.3, "Modifying Component Properties."

OmniPortlet does not currently support events, so there are no events listed on the Events tab.

All properties on the Parameters and Display Options tabs provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the Edit icon next to a property field to open the editor. For more information about using the editor and for descriptions of common EL expressions, see the "Expression Language Expressions" appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.
Note: When you enter EL on the generic Display Options tab in the Component Properties 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 14–1, "Display Options Properties".

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

17.5.2 OmniPortlet Properties

Table 17–1 describes the properties that are unique to OmniPortlet.

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Param#</td>
<td>Use to map page parameters to the parameters specified when the OmniPortlet was defined. These parameters enable you to contextually wire portlets and pages. For more information, see Chapter 19, &quot;Wiring Pages, Task Flows, Portlets, and ADF Components.&quot;</td>
<td>Parameters tab</td>
</tr>
<tr>
<td>All Modes Shared</td>
<td>For OmniPortlet, set this property to false to ensure that all portlet modes, except Show, are rendered each on their own page. Setting this property to true may prevent you from editing certain sections of your OmniPortlet in the OmniPortlet wizard.</td>
<td>Display Options tab</td>
</tr>
<tr>
<td>Screen</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Id</td>
<td>A unique identifier for the portlet instance.</td>
<td>Display Options tab</td>
</tr>
<tr>
<td>Partial Triggers</td>
<td>Use to initialize a partial page refresh, which is a way of refreshing an area of a page without having to redraw the entire page. Enter the IDs of the components that trigger the partial update. The portlet listens on the specified trigger components. If a trigger component receives a trigger event that causes it to update in some way, this portlet also requests to be updated.</td>
<td>Display Options tab</td>
</tr>
<tr>
<td>Render Portlet In I</td>
<td>Use to render the portlet in an inline frame (iframe), omit an inline frame, or let the portlet decide. Valid values are:</td>
<td>Display Options tab</td>
</tr>
</tbody>
</table>
| Frame                 | - auto (default): The portlet tag checks the portlet response and decides if an inline frame is required
|                       | - true: Render the portlet instance in an inline frame
|                       | - false: Render the portlet instance inline
|                       | Placing a portlet inline on a page provides a better user experience as compared to placing it in an inline frame. However, at times, it may be required to include a portlet in an inline frame. For example:
|                       | - The portlet is a JSF portlet
|                       | - The portlet contains a file upload element
|                       | - The parser throws an exception because it is not able to parse the markup |                           |
| Title                 | Enter a title for the OmniPortlet, to display in the portlet header.        | Display Options tab       |
17.6 Troubleshooting OmniPortlet

This section provides information to help you troubleshoot problems you may encounter while using OmniPortlet.

Cannot Define OmniPortlet Using the Customize Link
You are not able to define the OmniPortlet at runtime by using the Customize link.

Problem
OmniPortlet only supports a RenderPortletInIFrame value of true, which means that OmniPortlet must be rendered within an inline frame and therefore, the OmniPortlet property, RenderPortletInIFrame, must be set to true. At design time, the RenderPortletInIFrame property is available in the Property Inspector under Display Options. At runtime, the RenderPortletInIFrame property is available on the Properties panel in Composer.

Solution
Currently, the RenderPortletInIFrame property has a value of false and, consequently, when you click the Define link at runtime, the Type tab may not display and you cannot proceed with defining the OmniPortlet.

You can select Customize from the Action menu to define OmniPortlet, or, for Portal Framework applications at design time, select the OmniPortlet in the Structure window in Oracle JDeveloper, and in the Property Inspector, set RenderPortletInIFrame to true.
Working with the Web Clipping Portlet

This chapter describes Web Clipping and explains the user interface elements associated with the Web Clipping portlet.

This chapter includes the following topics:

- Section 18.1, "About Web Clipping"
- Section 18.2, "Adding a Web Clipping Portlet Instance to a Page"
- Section 18.3, "Working with the Web Clipping Portlet"
- Section 18.4, "Setting Web Clipping Portlet Properties"
- Section 18.5, "Current Limitations of the Web Clipping Portlet"
- Section 18.6, "Troubleshooting the Web Clipping Portlet"

Permissions: To perform the tasks in this chapter, you need the portal-level permission Basic Services: Edit Page Access, Structure, and Content (standard permissions) or the Pages: Edit Pages (advanced permissions). A portal moderator has this permission by default.

For more information about permissions, see Section 29.1, "About Roles and Permissions for a Portal."

Note: Instead of using Web Clipping, consider using a clipper pagelet using Oracle WebCenter Portal's Pagelet Producer. For more information, see the "Managing the Pagelet Producer" chapter in the Administering Oracle WebCenter Portal.

18.1 About Web Clipping

Web Clipping is a publishing portlet that enables you to integrate any web application with applications built using Oracle WebCenter Portal Framework and with WebCenter Portal. It is designed to give you quick integration by leveraging the existing user interface of the web application. With Web Clipping, you can consolidate content from web sites scattered throughout a large organization.

With Web Clipping, you can clip an entire web page, or a portion of it, and reuse it as a portlet. You can clip basic and HTML-form-based sites. Use Web Clipping when you want to copy content from an existing web page and expose it in your Portal Framework application as a portlet.
Web Clipping supports the following features:

- **Navigation through various styles of login mechanisms**
  
  Web Clipping supports various login mechanisms including form- and JavaScript-based submission and HTTP Basic and Digest Authentication with cookie-based session management.

- **Fuzzy matching of clippings**
  
  Fuzzy matching enables the Web Clipping engine to correctly identify a web clipping and deliver it as portlet content even if the web clipping is reordered within the source page or if its character font, size, or style changes.

- **Personalization**
  
  Personalization enables you to expose input parameters that end users can modify when they personalize the portlet. Parameters can be exposed as public parameters that you can map as page parameters. This feature enables end users to obtain personalized clippings.

- **Integrated authenticated web content through single sign-on**
  
  You can use external applications and leverage Oracle Single Sign-On to clip content from authenticated external web sites.

- **Inline rendering**
  
  Inline rendering enables you to set up Web Clipping portlets to display links within the context of the portlet. When a user clicks a link in the Web Clipping portlet, the results display within the same portlet. You can use this feature with internal and external web sites.

- **Proxy authentication**
  
  Web Clipping supports proxy authentication, including global proxy authentication and authentication for each user. You can use this feature if proxy servers require authentication. You can specify proxy server authentication details, including type (Basic or Digest) and realm in the `provider.xml` file. In addition, you can specify a scheme for entering user credentials as follows:
  - All users automatically log in using a user name and password that you provide.
  - All users are required to log in using a user name and password that they provide.
  - All public users (not authenticated into the WebCenter Portal application) automatically log in using a user name and password that you provide, while valid users (authenticated into the WebCenter Portal application) log in using a user name and password that they provide.

  For more information, see the "HTTP or HTTPS Proxy Configuration" section in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

- **Support for HTTPS**
  
  Web Clipping enables you to clip content from HTTPS-based external web sites if appropriate server certificates are acquired.

- **Open Transport API**
  
  By default, the Web Clipping provider supports only HTTP challenge-based authentication methods, such as Basic and Digest and form submission logins. To support custom authentication methods, such as Kerberos proxy authentication,
you can use the Web Clipping Transport API. For more information, see the "Using the Web Clipping Transport API" section in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

- **Reuse of a wide range of web content**

  Web Clipping provides basic support of pages written with JavaScript, applets, and plug-in enabled content, retrieved through HTTP GET and POST methods of form submission.

  Web Clipping also supports clipping of content from pages written with HTML 4.01, including:
  
  - Clipping of `<applet>`, `<body>`, `<div>`, `<embed>`, `<img>`, `<object>`, `<ol>`, `<span>`, `<table>`, and `<ul>` tagged content
  
  - Preservation of `<head>` styles and fonts, and CSS
  
  - Support for UTF-8 compliant character sets
  
  - Navigation through hyperlinks (HTTP GET), form submissions (HTTP POST), frames, and URL redirection

- **Globalization support**

  Web Clipping provides globalization support in URLs and URL parameters. For information about how Web Clipping determines the character set of clipped content, see Section 18.5, "Current Limitations of the Web Clipping Portlet."

- **Persistent storage of Web Clipping definitions**

  Web Clipping definitions are stored persistently in a repository. For information about Web Clipping repository, see the "Web Clipping Portlet Configuration Tips" section in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

- **Encryption of secure information**

  Any secure information, such as passwords, is stored in an encrypted form, according to the Data Encryption Standard (DES), using Oracle encryption technology.

## 18.2 Adding a Web Clipping Portlet Instance to a Page

In WebCenter Portal, if you have sufficient privileges, you can add a Web Clipping portlet instance to a page in the same way that you would add any other resource catalog component. For information, see Chapter 14, "Working with Resource Catalog Components on a Page."

### Note:

In WebCenter Portal, avoid adding a Web Clipping portlet instance to a Movable Box component (see Section 15.9, "Working with the Movable Box Component"). The Movable Box component duplicates the `showDetailFrame` that the portlet provides by default. Adding a portlet to a Movable Box creates an unnecessary and potentially error-prone redundancy.

When you add an instance of the Web Clipping portlet to a page, access the portlet’s Component Properties dialog and ensure that the **Render Portlet In I Frame** property is set to **true**. This displays the Web Clipping portlet in its own inline frame (iframe) in View mode. For information about the Component Properties dialog, see Section 18.4, "Setting Web Clipping Portlet Properties."
18.3 Working with the Web Clipping Portlet

Web Clipping content is defined at runtime. There are two ways to clip and save web content:

- **Customize** the portlet to set up a Web Clipping portlet to display content to all users
- **Personalize** the portlet to set up your own, personal view of a Web Clipping portlet

Both options take you into Web Clipping Studio, where you can:

- Browse for web content
- Choose the exact portion of the web content to clip
- Preview the clipped content as a portlet
- Save the clipped content as a portlet
- Set portlet properties and save the updated portlet information

To clip web content for display in the Web Clipping portlet:

1. Open the **Find a Web clipping** page:
   - To set up a Web Clipping portlet to display content to all users, open the page in edit mode (Composer) and click the **Customize** icon in the portlet header.
   - To set up your own, personal view of a Web Clipping portlet, click the **Personalize** icon in the portlet header.

   The **Find a Web clipping** page opens (Figure 18–1).

![Figure 18–1 The Find a Web Clipping Page](image)

Find a Web clipping.

No Web clipping has been chosen for this Portlet yet. To start, enter your starting URL and click "Start" to start browsing the Web in search of a Web clipping for this Portlet.

**URL Location:**

http://www.oracle.com/appserver/index.html  Start
2. In the **URL Location** field, enter the URL of the web page that contains or links to the content you want to clip.

3. Click **Start**.

   Web Clipping Studio displays the page you specified (**Figure 18–2**).

   **Note:** If your starting web page is not the page you plan to clip, then within Web Clipping Studio browse to the content you want to clip.

   As you click hyperlinks in the web page, Web Clipping Studio records your navigation links.

   **Note:** You can clip Secure Socket Layer (SSL)-enabled web sites if certificates of those sites are added to the certificate store. Certificates of SSL-enabled web sites that use Equifax, VeriSign, or Cybertrust certificates are included in the default certificate store.
5. On the page that contains the content you want to clip, click the **Section** icon or link on the Web Clipping Studio banner (Figure 18–3).

If you intend to clip the full web page, it is not necessary to section the page. You can clip the full page by clicking the **Select** icon or link instead of **Section** when you are on a page you want to clip.

**Figure 18–3  The Section Icon and Link in the Web Clipping Studio Banner**

![Section Icon and Link](image)

Cancel  Section  Select  Help

Sectioning divides the target web page into its clippable sections (Figure 18–4).

**Figure 18–4  Sectioned Web Page in Web Clipping Studio**

![Sectioned Web Page](image)

Notes: Only the significant browsing operations are recorded for later playback during the show mode. Any browsing operations that do not contribute to the eventual web clipping are discarded. Discarded links are not visited.

For any web sites that require HTTP Basic or Digest Authentication, a form is displayed that requests user name and password information. This encoded authentication information is recorded as part of the browsing information.

After you click **Section**, you cannot browse links in the displayed page. If you want to browse to other locations through page links, then click **Unsection** on the Web Clipping Studio banner. For more information about using Web Clipping, you can click the **Help** icon or link on any of the Web Clipping pages.
6. At the top-left corner of the section you want to clip, click Choose.

You can choose only one section at a time. Web Clipping Studio displays a preview of your chosen section.

7. If the displayed section is the clipping you want, then click Select on the Web Clipping Studio banner.

If the displayed section is not the clipping you want, then click Unselect to return to the page containing the section. You can choose another section on the page, or click Unsection to remove sectioning, enabling you to navigate to another page.

**Note:** To adjust sectioning to encompass smaller or larger areas on the web page, use the Section Smaller and Section Larger options on the Web Clipping Studio banner. Click Section Smaller to divide the web page into more, smaller sections. For example, click Section Smaller to drill down one level of nested tables. Click Section Larger to divide the web page into fewer, larger sections.

Once you have made your selection, the Web Clipping Studio displays the Find a Web clipping page with the selected web clipping’s properties.

8. Adjust the clipping’s property values as necessary:

   - **URL Rewriting**—Controls the behavior of links embedded in the clipped content.
     
     Select from:
     
     - **None**—To specify that link targets display on a new browser tab.
     - **Inline**—To specify that link targets display inside the portlet. If you have integrated with an external application or are logged into the clipped site, and if you choose Inline for URL Rewriting, then the session is maintained to the clipped site while browsing.

   **Note:** The URL Rewriting option is available only when you customize a portlet. This option is not available when you personalize a portlet.

   - **Title**—A title to display in the portlet header.
   - **Description**—A description of the clipping. The description is not displayed in the portlet.
   - **Time Out (seconds)**—The number of seconds to allow for the portlet to render before it times out.
Working with the Web Clipping Portlet

- **Expires (minutes)**—The number of minutes before cached portlet content expires. Once cached content expires, the next time the portlet is refreshed—either by a browser refresh or by clicking the Refresh link in the portlet itself—portlet content is retrieved from the web page from which the clipping originated.

- **Parameterize Inputs**—Options for customizing parameters associated with the clipped content.

Select the Click to start parameterizing check box to customize parameters associated with the content, and then perform the following steps:

a. From the Parameters list, select the parameters you intend to customize.

b. From the Personalizable list, select a parameter if you intend to enable users to provide their own parameter values when they personalize the portlet. Select None if you do not want to allow this.

c. In the Display Name field, enter a name to be displayed for the parameter.

d. In the Default Value field, enter a default value for the parameter.

**Note:** The Parameterize Inputs section displays only if you entered information in a form and then selected the section including the form for your web clipping.

9. Click OK to save changes to property values and to display the selected clipping in the Web Clipping portlet on your page.

**Note:** Web Clipping portlets support additional properties that influence the way the portlet is rendered. For information, see Section 18.4, "Setting Web Clipping Portlet Properties."

Figure 18–5 shows the selected web clipping in your Web Clipping portlet.

**Figure 18–5  Clipped Content in a Web Clipping Portlet**

**Note:** The Refresh link in the Web Clipping portlet retrieves data from cache or from the originating web site, depending upon the value you provided for Expires (minutes).
18.4 Setting Web Clipping Portlet Properties

The Web Clipping portlet has associated properties that control the look and feel of the portlet on the page. Users with sufficient privileges can access these properties through the Component Properties dialog (Figure 18–6).

Figure 18–6 Web Clipping Portlet Component Properties

For information about accessing the Component Properties dialog, see Section 14.3.2, “Setting Properties on a Component.”

The following sections provide information about properties of the events task flows and describe the properties on the Parameters tab:

- Section 18.4.1, "About Web Clipping Portlet Properties"
- Section 18.4.2, "Web Clipping Portlet Properties"

18.4.1 About Web Clipping Portlet Properties

The properties on the Parameters the Display Options tabs of the Component Properties dialog control the default Web Clipping portlets content. For descriptions of the parameters on these tabs, see Section 18.4.2, "Web Clipping Portlet Properties." For some task flows, parameters on this tab facilitate the wiring of the task flow to page parameters and page definition variables.

Changes to the properties on the Display Options, Style, and Content Style tabs affect the appearance and behavior of the task flow. These properties are common to all task flows. For more information, see Section 14.3, "Modifying Component Properties."
The contents of the Events tab depend on the events supported by the task flow. For more information, see Section 14.3.7, "Working with Component Contextual Events."

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

Note: When you enter EL on the generic Display Options tab in the Component Properties 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 14–1, "Display Options Properties".

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

18.4.2 Web Clipping Portlet Properties

Table 18–1 describes the properties that are unique to the Web Clipping portlet.

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Param#</td>
<td>Use to map page parameters to the parameters specified when the Web Clipping portlet was defined. These parameters enable you to contextually wire portlets and pages. For more information, see Chapter 19, &quot;Wiring Pages, Task Flows, Portlets, and ADF Components.&quot;</td>
<td>Parameters tab</td>
</tr>
<tr>
<td>All Modes Shared Screen</td>
<td>For Web Clipping, set this property to false to ensure that all portlet modes, except Show, are rendered each on their own page. Setting this property to true may prevent you from editing certain sections of your web clipping in the Web Clipping wizard.</td>
<td>Display Options tab</td>
</tr>
<tr>
<td>Id</td>
<td>A unique identifier for the portlet instance.</td>
<td>Display Options tab</td>
</tr>
</tbody>
</table>
Current Limitations of the Web Clipping Portlet

When you use Web Clipping, you should be aware of the following limitations:

- If the site that you intend to clip uses a large amount of JavaScript to manipulate cookies or uses the `document.write` JavaScript method to modify the HTML document being written, then you may not be able to clip content from the site.

- When you integrate with partner applications (by using `mod_osso`), you cannot clip directly through those partner applications in an authenticated manner. However, you can use partner applications through the external application framework.

- You cannot use the Web Clipping portlet to clip Oracle Portal pages and ADF pages. As a workaround, reregister the same producer in the destination portal and edit the portal manually.

- You cannot use the Web Clipping portlet to clip a web page that contains multiple frames, that is, a frameset.

- Note the following about Web Clipping and the use of a CSS:
  
  - If a web page contains multiple portlets that use a CSS, then they should not conflict if the CSS uses distinct style names (such as `OraRef`) to specify a style within an HTML tag, rather than using an HTML tag name (such as `<A>`) as the name of the style.
  
  - If one portlet uses a CSS, and that CSS overwrites the behavior of HTML tags by using the name of the tag (such as `<A>`) as the name of the style, and a
second portlet on the same page does not use a CSS, the second portlet is affected by the style instructions of the CSS of the first portlet.

- If two portlets on the same page use a different CSS and each CSS overwrites the behavior of HTML tags by using the name of an HTML tag (such as `<A>`) as the name of the style, then the style that is displayed depends on the browser.

- Web Clipping checks for globalization support settings in the following way:
  1. Web Clipping checks the `Content-Type` in the HTTP header for the `charset` attribute. If this is present, then it assumes that this is the character encoding of the HTML page.
  2. If the `charset` attribute is not present, then Web Clipping checks the HTML `META` tag on the page to determine the character encoding.
  3. If the HTML `META` tag is not found, then Web Clipping uses the `charset` in the previous browsed page. If this is the first page, then it defaults to the ISO-8859-1 character encoding.
  4. If the value of the `charset` for `Content-Type` or `META` tag is not supported (for example, if the `charset` was specified as `NONE`), then Web Clipping uses the default character set, ISO-8859-1, not the `charset` in the previously browsed page.

- To use the Web Clipping portlet, you must use Microsoft Internet Explorer 5.5 or later for Windows 2000, or Microsoft Internet Explorer 6.0 or later for Windows XP. If you use browser versions older than these, then you may encounter JavaScript errors.

### 18.6 Troubleshooting the Web Clipping Portlet

This section provides information to help you troubleshoot problems you may encounter while using Web Clipping.

**Encountered "x" at line n, column n. Was expecting one of : "x", "y" ...**

Parser error message written to the log file.

**Problem**
The web content displayed in the Web Clipping portlet contains invalid HTML or JavaScript.

**Solution**
This is a site-specific issue, not a Web Clipping error. Contact the site's administrator for assistance.
This chapter describes how to wire pages and components such as task flows, portlets, and ADF components together. You can use component wiring to create more complex relationships between a page and its components and between the components themselves.

This chapter includes the following topics:

- Section 19.1, "About Component Wiring"
- Section 19.2, "Wiring One Component to Another"
- Section 19.3, "Wiring Components and Page Parameters"
- Section 19.4, "Passing Parameter Values Through the Page URL"

Permissions: To perform the tasks in this chapter, you need the portal-level permission Basic Services: Edit Page Access, Structure, and Content (standard permissions) or the Pages: Edit Pages (advanced permissions). A portal moderator has this permission by default.

For more information about permissions, see Section 29.1, "About Roles and Permissions for a Portal."

19.1 About Component Wiring

Often a page needs information from a component on the page, or a region needs information from another region. While you can pass parameters through the page URL to obtain that information, doing so makes sense only when the parameters are well-known and the inputs are accessible to the page through Expression Language (EL). For more information, see Section 19.4, "Passing Parameter Values Through the Page URL."

Consider the case where you have a task flow with multiple page fragments that contain various interesting values that could be used as input on a page. 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.

Composer provides tools for wiring pages and components through the page **Parameters** tab and **Component Properties** dialogs.

### 19.1.1 About Events and Parameters

You can use parameters and events to pass values from one component to another, or from a page to a component on that page. Additionally, you can pass values to page components by specifying parameter values in the page’s URL.

**Note:** In this chapter, **component** refers collectively to ADF components (such as buttons), web development components (such as hyperlinks), task flows, and portlets.

Value passing is useful for synchronizing the content of a page with its components, or the content of one component to another. For example, you can wire a Parameter Form portlet so that the event of clicking its **OK** button triggers the passing of its user-entered values to another component on the page. One way to apply this model is to pass a user-entered name to a task flow or portlet that displays details relevant to that name. This is known as **contextual wiring** (events within the current context trigger the action of the event handler).

To clarify what is going on in a value passing scenario, 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.

**Note:** **Runtime** refers to the time when users run the application in a real-world environment. Contrast this with **design time**, which refers to the time developers build the application.

Runtime wiring creates a relationship between a producer event and a consumer event handler. You can create these relationships in the page editor. Select a component and view its events support on the **Events** tab of the Component Properties dialog (Figure 19–1).
Once you select and enable an event and an event handler (Action section in Figure 19–1), you can define the type of payload to deliver when the event is triggered.

Additionally, you create page parameters on the Parameters tab for the page (see Section 13.11, “Adding or Modifying Page Parameters”). You can easily configure page components to consume page parameters, and you can pass values to those parameters through the page URL.

19.2 Wiring One Component to Another

Components with built-in events and event handlers can be wired to each other to enable the passing of values from a producer component to a consumer component.

This section includes the following topics:

- Section 19.2.1, "Wiring a Task Flow to a Task Flow"
- Section 19.2.2, "Wiring a Portlet to a Portlet"
- Section 19.2.3, "Wiring a Portlet to a Task Flow"
- Section 19.2.4, "Wiring a Task Flow to a Portlet"
- Section 19.2.5, "Wiring an ADF Component to a Task Flow"

19.2.1 Wiring a Task Flow to a Task Flow

In addition to seeded WebCenter Portal tools and services task flows, you can bring custom task flows into WebCenter Portal. To bring custom task flows into WebCenter
Portal, you must first portletize them, so that they can be consumed by WebCenter Portal across a portlet bridge.

---

**Note:** When you work with contextual event wiring across a portlet bridge and no payload or a null payload is propagated across the wire from the producer portlet to the consumer, such payloads are delivered as an empty string. If the consumer portlet is required to differentiate between an empty string and null, you can encode the null in the producer portlet payload. The consumer portlet consequently looks for this custom encoding to detect the null payload.

---

Custom task flows may support events and may include the capability of parameter passing. Events and parameter passing could enable one custom task flow to pass values to other custom task flows on the same page. For example, you could wire custom task flows so that when a user selects a particular document, an event is raised that triggers parameter passing to the other custom task flows on the page. The passed parameters could cause the other custom task flows to rerender with content relevant to the selected document.

When a custom task flow is portletized, any portlet events or public render parameters raised by the portletized task flow are automatically delivered to other portletized task flows that declare support for those events or parameters. You can also manually wire portletized custom task flows using the page editor’s Component Properties dialog. The events and parameters that you configure vary according to the functionality that developers build into custom task flows. The steps provided in this section describe how to perform this manual mapping.

Creating and portletizing custom task flows and using the portlet bridge are all discussed in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper. For information about consuming custom task flows and other custom components in WebCenter Portal, see Administering Oracle WebCenter Portal.

To manually wire a task flow to a task flow:

1. Navigate to the relevant page, and open it in the page editor (see Section 12.4.3, "Opening a Page in the Page Editor (Composer)").

2. Click the view switcher to **Design** and click the Design tab to display the page in Design view.

3. Click the Edit icon on the task flow that consumes the payload provided by the producer task flow.

4. In the Component Properties dialog, click the Events tab to bring it forward, and, from the Events pane, select an event associated with the producer task flow.

   The Events pane lists all of the events that can be raised from any component on the page. An asterisk (*) on an event indicates that an action is handling it.

5. In the Actions pane, select the action to execute when the event occurs.

   The Actions pane lists all of the event handlers associated with the consumer task flow that are supported by the selected producer task flow. Only those actions that can be invoked for the event that is selected in the Events pane are shown. An asterisk (*) on an action indicates that it is handling an event.

6. Select Enable Action to enable the selected event and action.
An asterisk (*) appears next to the selected event and action. Value options appear below the check box.

7. From the displayed value options, select the type of value to use to deliver the payload from the producer task flow to the consumer task flow whenever the event occurs.

Choose from:
- **Constant**—Select **Constant**, and enter a constant or EL expression value to pass to the consumer task flow.
- **EventData**—Select to pass the variable ${payLoad}, which delivers whatever payload is specified by the producer task flow.

---

**Note:** The value for ${payLoad} is specified when the task flow is created.

---

8. Click **OK**.
9. Click **Save** to save your changes.
10. Test your wiring by triggering the event.

### 19.2.2 Wiring a Portlet to a Portlet

When a portlet is added to a page, it is automatically configured to listen to public render parameters and portlet events generated on the page and respond accordingly. This means that in many cases portlets are automatically wired, as long as the name of the public render parameter or publishing event on the producer side matches that of the public render parameter or processing event on the consumer side, or if an appropriate alias has been created to associate parameters or events.

When portlets have not been designed to explicitly work together, you can manually wire portlets as described in the steps below.

---

**Note:** You cannot turn off automatic parameter and event listening in WebCenter Portal. If you want to turn off this feature for a particular portlet you must:
1. Export the portal that consumes the portlet.
2. In JDeveloper, open the page definition for the page that contains the portlet.
3. Edit the portlet binding to set the `listenForAutoDeliveredPortletEvents` and `listenForAutoDeliveredParameterChanges` attributes to false:
   ```xml
   <portlet id="p2_1"
   ...>
     listenForAutoDeliveredPortletEvents="false"
     listenForAutoDeliveredParameterChanges="false"
   ... />
   <portlet id="p2_2"
   ...>
     listenForAutoDeliveredPortletEvents="false"
     listenForAutoDeliveredParameterChanges="false"
   ... />
   ...
   ...
   </page>
   ```
4. Import the portal back into WebCenter Portal.

---

To manually wire a portlet to a portlet:
1. Navigate to the relevant page, and open it in the page editor (see Section 12.4.3, "Opening a Page in the Page Editor (Composer)").

2. Click the view switcher to Design and click the Design tab to display the page in Design view.

3. Click the Edit icon on the portlet that consumes the payload provided by the producer portlet.

4. In the Component Properties dialog, click the Events tab to bring it forward, and select an event associated with the producer portlet.

   The Events pane lists all of the events that can be raised from any component on the page. An asterisk (*) on an event indicates that an action is handling it.

5. In the Actions pane, select the action to execute when the event occurs.

   The Actions pane lists all of the event handlers associated with the consumer portlet that are supported by the selected producer portlet. Only those actions that can be invoked for the event that is selected in the Events pane are shown. An asterisk (*) on an action indicates that it is handling an event.

6. Select Enable Action to enable the selected event and action.

   An asterisk (*) appears next to the selected event and action.

7. Provide values for the portlet parameters that now display at the bottom of the Events tab.

   Select Constant, and enter a composite data value, for example:

   

   $\{\text{payLoad.ora_wsrp_navigparam_Parameter1}\}

   

   **Note:** The parameter names and values were specified when the portlet was created.

8. Click OK.

9. Click Save to save your changes.

10. Test your wiring by triggering the event.

### 19.2.3 Wiring a Portlet to a Task Flow

In this scenario, the portlet is the producer, providing the event payload, and the task flow is the consumer of that payload.

To wire a portlet to a task flow:

1. Navigate to the relevant page, and open it in the page editor (see Section 12.4.3, "Opening a Page in the Page Editor (Composer)").

2. Click the view switcher to Design and click the Design tab to display the page in Design view.

3. Click the Edit icon on the task flow that consumes the payload provided by the producer portlet.

4. In the Component Properties dialog, click the Events tab to bring it forward, and select an event associated with the producer portlet from the Events pane.

   The Events pane lists all of the events that can be raised from any component on the page. An asterisk (*) on an event indicates that an action is handling it.
5. In the **Actions** pane, select the action to execute when the event occurs.

The **Actions** pane lists all of the event handlers associated with the consumer task flow that are supported by the selected producer portlet. Only those actions that can be invoked for the event that is selected in the **Events** pane are shown. An asterisk (*) on an action indicates that it is handling an event.

6. Select **Enable Action** to enable the selected event and action.

An asterisk (*) appears next to the selected event and action. Value options appear below the check box.

7. Select **Constant**, and enter a composite data value for a parameter associated with the producer portlet.

For example:

\[
\${payLoad.ora_wsrp_navigparam_Parameter1}
\]

8. Click **OK**.

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

10. Test your wiring by triggering the event.

### 19.2.4 Wiring a Task Flow to a Portlet

In this scenario, the task flow is the producer, providing the event payload, and the portlet is the consumer of that payload.

To wire a task flow to a portlet:

1. Navigate to the relevant page, and open it in the page editor (see Section 12.4.3, "Opening a Page in the Page Editor (Composer)").

2. Click the view switcher to **Web** and click the **Design** tab to display the page in Design view.

3. Click the **Edit** icon on the portlet that consumes the payload provided by the producer task flow.

4. In the Component Properties dialog, click the **Events** tab to bring it forward, and select an event associated with the producer task flow in the **Events** pane.

The **Events** pane lists all of the events that can be raised from any component on the page. An asterisk (*) on an event indicates that an action is handling it.

5. In the **Actions** pane, select the action to execute when the event occurs.

The **Actions** pane lists all of the event handlers associated with the consumer portlet that are supported by the selected producer task flow. Only those actions that can be invoked for the event that is selected in the **Events** pane are shown. An asterisk (*) on an action indicates that it is handling an event.

6. Select **Enable Action** to enable the selected event and action.

An asterisk (*) appears next to the selected event and action.

7. Provide values for the portlet parameters that now appear at the bottom of the **Events** tab.

Select **Constant**, and enter a composite data value, for example:

\[
\${payLoad.ora_wsrp_navigparam_Parameter1}
\]
Wiring One Component to Another

19.2.5 Wiring an ADF Component to a Task Flow

In this scenario, the ADF component is the producer of the payload, and the task flow is the consumer of the payload.

To wire an ADF component to a task flow:

1. Navigate to the relevant page, and open it in the page editor (see Section 12.4.3, "Opening a Page in the Page Editor (Composer)").
2. Click the view switcher to and click the Design tab to display the page in Design view.
3. Click the Edit icon on the task flow that consumes the payload provided by the producer ADF component.
4. In the Component Properties dialog, click the Events tab to bring it forward, and select an event associated with the producer ADF component in the Events pane.
   The Events pane lists all of the events that can be raised from any component on the page. An asterisk (*) on an event indicates that an action is handling it.
5. In the Actions pane, select the action to execute when the event occurs.
   The Actions pane lists all of the event handlers associated with the consumer task flow that are supported by the selected producer ADF Component. Only those actions that can be invoked for the event that is selected in the Events pane are shown. An asterisk (*) on an action indicates that it is handling an event.
6. Select Enable Action to enable the selected event and action.
   An asterisk (*) appears next to the selected event and action. Value options appear below the check box.
7. Select the type of value to use to deliver the payload from the producer ADF component to the consumer task flow whenever the event occurs.
   Choose from:
   - Constant—Select Constant, and enter a constant or EL expression value to pass to the consumer task flow.
   - EventData—Select to pass the variable ${payLoad}, which delivers whatever payload is specified by the producer ADF component.

Note: The parameter names and values were specified when the portlet was created.

8. Click OK.
9. Click Save to save your changes.
10. Test your wiring by triggering the event.

19.3 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.

This section describes how to create and consume page parameters in the following subsections:

- **Section 19.3.1, "Creating Page Parameters"
- **Section 19.3.2, "Consuming Page Parameters"

19.3.1 Creating Page Parameters

Use the **Parameters** tab in the page editor to create page parameters.

To create a new page parameter, refer to **Section 13.11, "Adding or Modifying Page Parameters."**

19.3.2 Consuming Page Parameters

In addition to wiring components to each other, you can wire them to page parameters. Page parameters are user-constructed name/value pairs for use in passing values to page components, such as task flows, portlets, and ADF components.

You can create page parameters and configure task flows and portlets to consume them. This section describes how to wire a task flow with a page parameter.

---

**Note:** Before you can take the steps outlined in this section, you must create a page parameter and provide it with a value. For more information, see **Section 19.3.1, "Creating Page Parameters."**

---

To consume a page parameters (wiring a task flow to a page parameter):

1. Navigate to the relevant page, and open it in the page editor (see **Section 12.4.3, "Opening a Page in the Page Editor (Composer)"**).
2. Click the view switcher to **Design** and click the **Design** tab to display the page in Design view.
3. Click the **Edit** icon on the task flow to be wired to a page parameter.
4. In the Component Properties dialog, on the **Parameters** tab, click the **Expression Builder** icon next to the property that takes the parameter value, then select **Expression Builder** to open the Expression Editor.
5. Select **Choose a value**.

6. Under **Choose a value**, select **Page Parameter** from the first list, and the name of the relevant page parameter from the second.

7. Click **OK** to exit the Expression Editor.

8. Click **OK** to save your changes and exit the Component Properties dialog.

   The task flow is refreshed, now displaying the result of the value passed through the page parameter.

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

### 19.4 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`. 
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.

- Chapter 20, "Creating, Editing, and Managing Portal Assets"
- Chapter 21, "Working with Page Templates"
- Chapter 22, "Working with Navigation Models"
- Chapter 23, "Working with Resource Catalogs"
- Chapter 24, "Working with Skins"
- Chapter 25, "Working with Page Styles"
- Chapter 28, "Working with Content Presenter Templates"
- Chapter 26, "Working with Pagelets"
- Chapter 27, "Working with Data Presenter"
Creating, Editing, and Managing Portal Assets

This chapter describes the different assets that are available for you to use in a portal and some of the common operations you can perform on those assets. Assets include navigation models, page templates, resource catalogs, and so on.

This chapter focuses on working with the assets available to individual portals. For information specific to shared assets; that is, assets that are available to all portals, see Chapter 59, "Working with Shared Assets."

This chapter includes the following topics:

- Section 20.1, "About Assets"
- Section 20.2, "Accessing Portal Assets"
- Section 20.3, "Creating Assets"
- Section 20.4, "Editing Assets"
- Section 20.5, "Managing Assets"
- Section 20.6, "Querying Assets Using EL Expressions"
- Section 20.7, "Applying Assets Dynamically Using EL Expressions"
- Section 20.8, "Working with Portal Assets in JDeveloper"

Tip: For detailed information about a particular type of asset, see the asset-specific chapter listed in Section 20.1, "About Assets."

Permissions: To perform the tasks in this chapter, you need the portal-level permission Create, Edit, and Delete Assets (standard permissions) or Create, Edit, and Delete 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 page templates owned by a portal.

For more information about portal-level permissions, see Section 29.1, "About Roles and Permissions for a Portal."

20.1 About Assets

Assets are the objects that define the structure, look and feel, and the content of your portals. WebCenter Portal provides the following assets:

- **Page Templates** define the interface that surrounds page content and help to apply a consistent look and feel across all pages in a portal. For more information, see
Chapter 21, "Working with Page Templates."

- **Navigation Models** define how to link together information from multiple sources, such as pages, content repositories, and external web pages. For more information, see Chapter 22, "Working with Navigation Models."

- **Resource Catalogs** define the components that users can add to their pages, page templates, and task flows. For more information, see Chapter 23, "Working with Resource Catalogs."

- **Skins** define the appearance and look and feel, including colors and fonts, of a specific portal or the entire application. For more information, see Chapter 24, "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. For more information, see Chapter 25, "Working with Page Styles."

- **Content Presenter Display Templates** define templates for displaying content. For more information, see Chapter 28, "Working with Content Presenter Templates."

- **Pagelets** define sub-components of a web page accessed through the Oracle WebCenter Portal's Pagelet Producer that can be injected into any proxied application. For more information, see Chapter 26, "Working with Pagelets."

- **Data Controls** define how to connect to and read data from external repositories that can then be used as data sources by Data Presenter. For more information, see Section 27.2, "Working with Data Controls."

- **Task Flows** define how to visualize data with Data Presenter. For more information, see Section 27.3, "Working with Task Flows."

- **Task Flow Styles** define the layout of task flows created in WebCenter Portal. For more information, see Section 27.4, "Working with Task Flow Styles."

### 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.

- **Portal assets** 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 (Figure 20–1) 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 20–1   The Shared Icon**

This chapter focuses on how to work with portal assets. For information about shared assets, see Chapter 59, "Working with Shared Assets."

### Default Asset Settings

By default, global default asset settings, such as the page template, skin, resource catalog, and navigation model, are used by all portals (indicated by the use of **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 the "Configuring Global Defaults Across Portals" chapter in Administering Oracle WebCenter Portal.

For information about configuring portal-specific default asset settings, see Section 7.3, "Administering Look and Feel Settings for a Portal."

## 20.2 Accessing Portal Assets

You access portal assets from the Assets page for the portal that owns the assets. When you access the Assets page for a portal, it lists all the assets, including shared assets, available for use in that particular portal (Figure 20–2).

**Figure 20–2 The Assets Page for a Portal**

You can access the Assets page for a portal in any of the following ways:

- Through the portal editor. For more information, see Section 6.3, "Accessing Assets in the Portal Editor."
- Through portal administration. For more information, see Section 7.5.1, "Accessing Assets Administration for a Portal."
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:** Appendix A, "WebCenter Portal Pretty URLs"

Shared assets are indicated by the Shared icon (Figure 20–1). To work with shared assets, you must use the Shared Assets page.

**See Also:** Chapter 59, "Working with Shared Assets"

### 20.3 Creating 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 on the Assets page at all. To create these assets you must use a development tool, such as Oracle JDeveloper.

<table>
<thead>
<tr>
<th>Asset</th>
<th>Create in Browser?</th>
<th>How?</th>
<th>Further Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Page Templates</td>
<td>Yes</td>
<td>Only by extending another page template</td>
<td>Section 21.3, &quot;Creating a Page Template&quot;</td>
</tr>
<tr>
<td>Navigation Models</td>
<td>Yes</td>
<td>From scratch or by extending another navigation model</td>
<td>Section 22.2, &quot;Creating a Navigation Model&quot;</td>
</tr>
<tr>
<td>Resource Catalogs</td>
<td>Yes</td>
<td>From scratch or by extending another resource catalog</td>
<td>Section 23.4, &quot;Creating a Resource Catalog&quot;</td>
</tr>
<tr>
<td>Skins</td>
<td>Yes</td>
<td>Only by making a copy of another skin</td>
<td>Section 24.3, &quot;Creating a Skin&quot;</td>
</tr>
<tr>
<td>Page Styles</td>
<td>Yes</td>
<td>Only by making a copy of another page style</td>
<td>Section 25.3, &quot;Creating a Page Style&quot;</td>
</tr>
<tr>
<td>Content Presenter</td>
<td>No</td>
<td>(Not applicable)</td>
<td>“Creating Content Presenter Display Templates” in Developing Portals with Oracle JDeveloper</td>
</tr>
<tr>
<td>Display Templates</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Task Flow Styles</td>
<td>Yes</td>
<td>Only by making a copy of another task flow style and editing the source code</td>
<td>Section 27.4.3, &quot;Editing a Task Flow Style&quot;</td>
</tr>
<tr>
<td>Pagelets</td>
<td>No</td>
<td>(Not applicable)</td>
<td>“Exporting and Importing Pagelet Producer Resources” in Administering Oracle JDeveloper</td>
</tr>
</tbody>
</table>

Table 20–1 describes the support available for creating the different assets in WebCenter Portal.
20.4 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 with the page editor (Composer) 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.

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 Section 20.8, "Working with Portal Assets in JDeveloper."

This section includes the following topics:

- Section 20.4.1, "Editing an Asset Using the Edit Option"
- Section 20.4.2, "Editing the Source Code of an Asset"

### 20.4.1 Editing an Asset Using the Edit Option

Depending on the asset being edited, choosing the Edit option either opens the asset in Composer or in an asset-specific Edit dialog. For information about editing an asset, refer to the asset-specific chapter, listed in Table 20–2.

<table>
<thead>
<tr>
<th>Asset</th>
<th>Create in Browser?</th>
<th>How?</th>
<th>Further Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Task Flows</td>
<td>Yes</td>
<td>Only from scratch</td>
<td>Section 27.3.3, &quot;Creating a Task Flow to Visualize Data&quot;</td>
</tr>
<tr>
<td>Data Controls</td>
<td>Yes</td>
<td>Only from scratch</td>
<td>Section 27.2.2, &quot;Creating Data Controls&quot;</td>
</tr>
</tbody>
</table>

### Table 20–2 Editing Assets Using the Edit Option

<table>
<thead>
<tr>
<th>Asset</th>
<th>Edit Using</th>
<th>Documentation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Page Templates</td>
<td>Composer</td>
<td>Section 21.4, &quot;Editing a Page Template&quot;</td>
</tr>
<tr>
<td>Navigation Models</td>
<td>Edit dialog</td>
<td>Section 22.3, &quot;Editing a Navigation Model&quot;</td>
</tr>
<tr>
<td>Resource Catalogs</td>
<td>Edit dialog</td>
<td>Section 23.5, &quot;Editing a Resource Catalog&quot;</td>
</tr>
<tr>
<td>Skins</td>
<td>Edit dialog</td>
<td>Section 24.4, &quot;Editing a Skin&quot;</td>
</tr>
<tr>
<td>Page Styles</td>
<td>(Edit Source dialog only)</td>
<td>Section 20.4.2, &quot;Editing the Source Code of an Asset&quot;</td>
</tr>
<tr>
<td>Content Presenter</td>
<td>(Edit Source dialog only)</td>
<td>Section 20.4.2, &quot;Editing the Source Code of an Asset&quot;</td>
</tr>
<tr>
<td>Display Templates</td>
<td>(Edit Source dialog only)</td>
<td>Section 20.4.2, &quot;Editing the Source Code of an Asset&quot;</td>
</tr>
</tbody>
</table>
20.4.2 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. Navigate to the **Assets** page for the portal that owns the asset.

   For more information, see Section 20.2, "Accessing Portal Assets."

   **Tip:** For shared assets, see Section 59.2, "Accessing Shared Assets."

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 20–3 Editing Asset Source Code

<table>
<thead>
<tr>
<th>Asset</th>
<th>Tab</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Page Templates</td>
<td>Template</td>
<td>Edit the JSPX file that represents the page template.</td>
</tr>
</tbody>
</table>

---
6. When you are done, click **Save and Close**.

### 20.5 Managing Assets

In addition to creating and editing assets, there are other operations that you can perform on assets on the **Assets** page.

This section includes the following topics:

- **Section 20.5.1, “Viewing Information About an Asset”**
- **Section 20.5.2, “Previewing an Asset”**
- **Section 20.5.3, “Showing and Hiding Assets”**
- **Section 20.5.4, “Copying an Asset”**
- **Section 20.5.5, “Setting Properties on an Asset”**
- **Section 20.5.6, “Setting Security for an Asset”**
- **Section 20.5.7, “Downloading an Asset”**
- **Section 20.5.8, “Uploading an Asset”**

---

**Table 20–3 (Cont.) Editing Asset Source Code**

<table>
<thead>
<tr>
<th>Asset</th>
<th>Tab</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Page Definition</td>
<td></td>
<td>Edit the page template's associated page definition XML file.</td>
</tr>
<tr>
<td>Navigation Models</td>
<td>Navigation Model</td>
<td>Edit the XML file that represents the navigation model.</td>
</tr>
<tr>
<td>Resource Catalogs</td>
<td>Catalog Definition</td>
<td>Edit the XML file that represents the resource catalog.</td>
</tr>
<tr>
<td>Skins</td>
<td>CSS</td>
<td>Edit the CSS file for the skin.</td>
</tr>
<tr>
<td>Page Styles</td>
<td>Page</td>
<td>Edit the JSPX file that represents the page style.</td>
</tr>
<tr>
<td></td>
<td>Page Definition</td>
<td>Edit the page style's associated page definition XML file.</td>
</tr>
<tr>
<td>Content Presenter</td>
<td>Fragment</td>
<td>Edit the JSFF file that represents the Content Presenter display template.</td>
</tr>
<tr>
<td>Display Templates</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Task Flow Styles</td>
<td>Taskflow Definition</td>
<td>Edit the XML file that represents the task flow style.</td>
</tr>
<tr>
<td></td>
<td>Fragment</td>
<td>Edit the page fragment JSFF file.</td>
</tr>
<tr>
<td></td>
<td>Page Definition</td>
<td>Edit the page fragment's page definition XML file.</td>
</tr>
<tr>
<td>Pagelets</td>
<td>(Not applicable)</td>
<td>Source code cannot be edited in the browser.</td>
</tr>
<tr>
<td>Task Flows</td>
<td>Taskflow Definition</td>
<td>Edit the XML file that represents the task flow.</td>
</tr>
<tr>
<td></td>
<td>Fragment</td>
<td>Edit the page fragment JSFF file.</td>
</tr>
<tr>
<td></td>
<td>Page Definition</td>
<td>Edit the page fragment's page definition XML file.</td>
</tr>
<tr>
<td>Data Controls</td>
<td>(not applicable)</td>
<td>Source code cannot be edited in the browser.</td>
</tr>
</tbody>
</table>
20.5.1 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. For information about editing these properties, see Section 20.5.5, "Setting Properties on an Asset."

To view information about an asset:

1. Navigate to the Assets page for the portal that owns the asset.
   For more information, see Section 20.2, "Accessing Portal Assets."
   Tip: For shared assets, see Section 59.2, "Accessing Shared Assets."

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.

5. The Show Properties dialog (Figure 20–3) displays information about the selected asset.

Figure 20–3  The Show Properties Dialog for the Default Navigation Model

Table 20–4  Asset Properties

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display Name</td>
<td>The display name of the asset.</td>
</tr>
<tr>
<td>Description</td>
<td>The description of the asset.</td>
</tr>
<tr>
<td>Icon URI</td>
<td>The URI of the icon that is associated with the asset.</td>
</tr>
</tbody>
</table>
6. Click OK.

20.5.2 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. Navigate to the Assets page for the portal that owns the asset.
   
   For more information, see Section 20.2, "Accessing Portal Assets."

   **Tip:** For shared assets, see Section 59.2, "Accessing Shared Assets."

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.

### 20.5.3 Showing and Hiding Assets

You can make a built-in or custom asset available for use in your 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.

**Figure 20–4** shows several skins. The built-in Fusion FX and Skyros skins are available, and the Example Skin custom skin is hidden.

*Figure 20–4  Available and Hidden Assets Indicators on the Assets Page*

When you first create or upload an asset, by default it is marked as hidden. A hidden asset is not available for selection in asset pickers. For an asset to become available in asset pickers, it must be published, that is, made available. For example, **Figure 20–5** shows the list of skins that are available for selection as the portal's default skin. Note that the hidden skin Example Skin is not included in this list.
You can, however, use a hidden asset as the starting point for creating a new asset. For example, Figure 20–6 shows that the hidden skin Example Skin is listed in the Copy From list when you create a new skin.

To show or hide an asset:

1. Open the Assets page for the portal that owns the asset (see Section 20.2, "Accessing Portal Assets").

   **Tip:** For shared assets, see Section 59.2, "Accessing Shared Assets."

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.

### 20.5.4 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 marked as hidden regardless of the status of the original asset.
To copy an asset:

1. Navigate to the Assets page for the portal that owns the asset.
   For more information, see Section 20.2, "Accessing Portal Assets."

   **Tip:** For shared assets, see Section 59.2, "Accessing Shared Assets."

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 (Figure 20–7), in the Display Name field, enter a name for the copy.

   **Figure 20–7  The Copy Dialog for a Page Template**

6. In the Description field, enter a description for the new asset.
7. Click OK.

### 20.5.5 Setting Properties on an Asset

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

Use the Edit Properties dialog (Figure 20–8) to view and edit the properties associated with assets.
The Edit Properties dialog contains the following sections:

- **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`.

For information about how to add, edit, or delete attributes, see Section 20.5.5.5, "Setting Asset Attributes."

**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. For more information, see Section 59.6, "Setting the Availability of a Shared Asset."

This section includes the following topics:

- Section 20.5.5.1, "Accessing the Edit Properties Dialog for an Asset"
- Section 20.5.5.2, "Editing the Name or Description of an Asset"
- Section 20.5.5.3, "Categorizing an Asset"
- Section 20.5.5.4, "Associating an Icon with an Asset"
- Section 20.5.5.5, "Setting Asset Attributes"
20.5.5.1 Accessing the Edit Properties Dialog for an Asset

The Edit Properties dialog is accessed from the **Actions** menu on the **Assets** page.

To access the Edit Properties dialog for an asset:

1. Navigate to the **Assets** page for the portal that owns the asset.
   
   For more information, see Section 20.2, "Accessing Portal Assets."

   **Tip:** For shared assets, see Section 59.2, "Accessing Shared Assets."

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**.

5. In the Edit Properties dialog (Figure 20–8), edit the properties as desired. For more information, see:
   - Section 20.5.5.2, "Editing the Name or Description of an Asset"
   - Section 20.5.5.3, "Associating an Icon with an Asset"
   - Section 20.5.5.4, "Categorizing an Asset"
   - Section 20.5.5.5, "Setting Asset Attributes"

   The Edit Properties dialog also includes display-only fields that provide additional useful information about the asset. For a list of all the fields in the Edit Properties dialog, see Table 20–4.

6. Click **OK**.

20.5.5.2 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, as described in Section 20.5.5.1, "Accessing the Edit Properties Dialog for an Asset."

2. In the Edit Properties dialog (Figure 20–8), 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**.

20.5.5.3 Associating an Icon with an Asset

You can associate an icon with an asset. In the current version of WebCenter Portal, the associated icon is visible only for page styles when you create a page.

To associate an icon with an asset:

1. Open the Edit Properties dialog for the asset that you want to edit, as described in Section 20.5.5.1, "Accessing the Edit Properties Dialog for an Asset."

2. In the Edit Properties dialog (Figure 20–8), in the **Icon URI** field, enter a standard URI path to the icon.
You can specify either 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 on the portal server. To store an image on the portal server, you must upload the required file, as described in the "Uploading Files" section in *Using Oracle WebCenter Portal*. You can then obtain the image's URL by copying the Download URL value as described in the "Retrieving the URL for a Folder or File" section in *Using Oracle WebCenter Portal*.

3. Click **OK**.

### 20.5.5.4 Categorizing an Asset

You can classify assets into relevant groups. For example, all page styles associated with Sales could have 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, as described in Section 20.5.5.1, "Accessing the Edit Properties Dialog for an Asset."

2. In the Edit Properties dialog (Figure 20-8), in the **Category** field, enter a category name.

3. Click **OK**.

### 20.5.5.5 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. 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.

To set asset attributes:

1. Open the Edit Properties dialog for the asset that you want to edit, as described in Section 20.5.5.1, "Accessing the Edit Properties Dialog for an Asset."

2. In the Attributes section of the Edit Properties dialog (Figure 20-8), in the **Name** field, enter the name of the attribute.

3. In the **Value** field, enter the value for the attribute.

4. Click **Add More** if you want to add more attributes. This adds a new row.

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**.

### 20.5.6 Setting Security for an Asset

You can control whether all users or only specific users or groups can access assets. 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. Navigate to the **Assets** page for the portal that owns the asset.
   
   For more information, see Section 20.2, "Accessing Portal Assets."

   **Tip:** For shared assets, see Section 59.2, "Accessing Shared Assets."

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 20–9  The Security Settings Dialog**

   ![Security Settings Dialog](image)

   **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 Section 30.5.1, "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**.

### 20.5.7 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 (see Chapter 59, "Working with Shared Assets").

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. Navigate to the **Assets** page for the portal that owns the asset.
   
   For more information, see Section 20.2, "Accessing Portal Assets."

   **Tip:** For shared assets, see Section 59.2, "Accessing Shared Assets."

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.
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. In the **Path** field, enter the location on the portal server where you want to save the archive file.

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, for example JDeveloper.

   **Tip:** For information about how to import assets into JDeveloper, see the "How to Import a Portal Resource into JDeveloper" section in Developing Portals with Oracle WebCenter Portal and Oracle 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. 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, we recommend 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`.
20.5.8 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 (see Chapter 59, "Working with Shared Assets").

When you upload an asset to WebCenter Portal:

- Existing assets, that is, 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.

**Tip:** For information about how to export assets from JDeveloper, see the "How to Export a Portal Resource from JDeveloper" section in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

To upload an asset:

1. Navigate to the Assets page for the portal that owns the asset.
   
   For more information, see Section 20.2, "Accessing Portal Assets."

   **Tip:** For shared assets, see Section 59.2, "Accessing Shared Assets."

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 20–11 The Upload Dialog for a Page Template**

Upload New Page Template

- Look on My Computer
  
  Choose File | No file chosen

- Look on WebCenter Portal Server

Upload | Cancel
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 the "importWebCenterResource" section in the *WebLogic Scripting Tool Command 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, we recommend 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`.

### 20.5.9 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. If you mark an asset for deletion, it is deleted even if it is in use.

To delete an asset:

1. Navigate to the **Assets** page for the portal that owns the asset.
   
   For more information, see *Section 20.2, "Accessing Portal Assets."*

   **Tip:** For shared assets, see *Section 59.2, "Accessing Shared Assets."*

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**.

### 20.6 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`: 

---

**Querying Assets Using EL Expressions**

---

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Applying Assets Dynamically Using EL Expressions

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#(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 the "Expression Language Expressions" appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

20.7 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 moderators, 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. For more information, see Section 20.5.1, "Viewing Information About an Asset."

2. Access WebCenter Portal Builder administration and open the General page. Or access a specific portal's administration page as described in Section 7.1, "Accessing Portal Administration," 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/builder/administration/general

   - Portal-level:
     http://host:port/webcenter/portal/portalName/admin/settings

   See Also: Appendix A, "WebCenter Portal Pretty URLs"

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.
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_57fd6e6e4ff7' : '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 the "Expression Language Expressions" appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

5. Click OK.

### 20.8 Working with Portal 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 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 Portals with Oracle WebCenter Portal and Oracle JDeveloper.

---

**Note:** In JDeveloper, assets are referred to as portal resources.

The process for working with portal assets in JDeveloper works as follows:


   **Tip:** You can create new assets in JDeveloper for the purpose of using them in your portal. However, creating assets in WebCenter Portal first and then refining them in JDeveloper means that you do not have to worry about the prerequisites involved in creating assets for use in WebCenter Portal from scratch in JDeveloper.
2. Download the asset to an archive file.
   For more information, see Section 20.5.7, "Downloading an Asset."

3. Import the archive file into JDeveloper.
   For more information, see the "How to Import a Portal Resource into JDeveloper" section in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

4. Edit the imported asset in JDeveloper.

5. Export the asset to an archive file.
   For more information, see the "How to Export a Portal Resource from JDeveloper" section in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

6. Upload the archive file to WebCenter Portal.
   For more information, see Section 20.5.8, "Uploading an Asset."
This chapter describes how to create, modify, and manage a page template in WebCenter Portal.

**Note:** Creating and editing a page template is a complex task. While you can develop page templates in Portal Builder as described here, the editing capabilities are limited. Oracle recommends that developers use JDeveloper to develop page templates for portals. For existing page templates in WebCenter Portal, a developer can upload them to JDeveloper to further refine and develop them. 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 on through Portal Builder.

For more information, see Section 20.8, "Working with Portal Assets in JDeveloper" and the "Developing Page Templates" chapter in *Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper*.

This chapter includes the following topics:

- Section 21.1, "About Page Templates"
- Section 21.2, "Setting the Default Page Template"
- Section 21.3, "Creating a Page Template"
- Section 21.4, "Editing a Page Template"
- Section 21.5, "Setting the Preferred Skin for a Page Template"
- Section 21.6, "Customizing a Shared Page Template for a Portal"
- Section 21.7, "Adding Navigation to a Page Template"
- Section 21.8, "Managing a Page Template"
21.1 About Page Templates

Every page in a portal has an associated page template that defines the structure 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 moderator (see Section 21.2, “Setting the Default Page Template”). In contrast, the page style defines the initial layout of the main content area and may be unique for every page (see Section 25.1, “About Page Styles”).

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.

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 (see Chapter 25, “Working with Page Styles”).

- Portal navigation. For example, you might have global navigation in the header and additional navigation on the left side of the page. See Section 22.1, “About Portal Navigation.”

- 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.

Figure 21–1 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.

   **See Also:** Chapter 25, "Working with Page Styles"

4. Footer at the bottom of the page.

**Figure 21–1  Page Template - Basic Structure**

A page template can expose 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 navigation models.

   **See Also:** Chapter 22, "Working with Navigation Models"

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.

**See Also:** Section 24, "Working with Skins"

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.

**See Also:** Section 21.5, "Setting the Preferred Skin for a Page Template"

### 21.1.1 About Built-in Page Templates

WebCenter Portal provides several built-in page templates suited to common page design requirements, described in Table 21–1.

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 (see Section 21.3, "Creating a Page Template"), selecting the built-in page template from the Copy From list, and then make the required adjustments in the new page template. At the *portal level*, you can customize the built-in templates for a specific portal, as described in Section 21.6, "Customizing a Shared Page Template for a Portal."

**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.

For more information about how to visualize portal navigation within a page template, see Section 21.7, "Adding Navigation to a Page Template."

Table 21–1 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 (v2) 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.
## Table 21–1  Built-in Page Templates

<table>
<thead>
<tr>
<th>Name</th>
<th>Release</th>
<th>Preferred Skin</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Skyros Side Navigation v2</td>
<td>11.1.1.8.3</td>
<td>Skyros v2</td>
<td>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.</td>
</tr>
<tr>
<td>Skyros Side Navigation (Stretch) v2</td>
<td>11.1.1.8.3</td>
<td>Skyros v2</td>
<td>A stretching page layout with side navigation that offers simplified customization and fewer task flows for faster performance over the earlier Side Navigation (Stretch) template. Page and portal actions are available under an Actions icon at the top right of the page header. When the page shows scroll bars, the side navigation area, page header, and page footer remain in view as you scroll the contents of the page.</td>
</tr>
<tr>
<td>Skyros Top Navigation v2</td>
<td>11.1.1.8.3</td>
<td>Skyros v2</td>
<td>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 remain in view as you scroll the contents of the page.</td>
</tr>
</tbody>
</table>
### Table 21–1 (Cont.) Built-in Page Templates

<table>
<thead>
<tr>
<th>Name</th>
<th>Release</th>
<th>Preferred Skin</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Skyros Top Navigation (Stretch) v2</td>
<td>11.1.1.8.3</td>
<td>Skyros v2</td>
<td>A stretching page layout with top navigation that offers simplified customization and fewer task flows for faster performance over the earlier Top Navigation (Stretch) templates. Page and portal actions are available under an Actions icon at the top right of the page header. When the page shows scroll bars, the page header and footer scroll out of view as you scroll the contents of the page.</td>
</tr>
<tr>
<td>Skyros Side Navigation (Tablet)</td>
<td>11.1.1.8.0</td>
<td>Skyros</td>
<td>A tablet-friendly page layout with side navigation. There are no page or portal actions available in this template. When the page shows scroll bars, the side navigation area, page header, and page footer remain in view as you scroll the contents of the page.</td>
</tr>
<tr>
<td>Skyros Top Navigation</td>
<td>11.1.1.8.0</td>
<td>Skyros</td>
<td>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.</td>
</tr>
</tbody>
</table>

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 Skyros Top Navigation v2.
### Table 21–1 (Cont.) Built-in Page Templates

<table>
<thead>
<tr>
<th>Name</th>
<th>Release</th>
<th>Preferred Skin</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Skyros Top Navigation (Stretch)</td>
<td>11.1.1.8.0</td>
<td>Skyros</td>
<td>A stretching 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 page shows scroll bars, the page header and footer remain in view as you scroll the contents of the page.</td>
</tr>
<tr>
<td>Skyros Top Navigation (Tablet)</td>
<td>11.1.1.8.0</td>
<td>Skyros</td>
<td>A tablet-friendly flowing page layout with top navigation. There are no page or portal actions available in this template. This page template shows only one level of navigation. When the browser window shows scroll bars, the page header and footer scroll out of view as you scroll the contents of the page.</td>
</tr>
<tr>
<td>WebCenter Portal Top Navigation</td>
<td>11.1.1.8.0</td>
<td>WebCenter Portal Skin</td>
<td>A default 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.</td>
</tr>
</tbody>
</table>
### Table 21–1  (Cont.) Built-in Page Templates

<table>
<thead>
<tr>
<th>Name</th>
<th>Release</th>
<th>Preferred Skin</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Collaborative with Top Navigation</td>
<td>11.1.1.6.0</td>
<td>Spaces FX</td>
<td>A page template for collaborative portals, with flowing layout and top navigation. When the browser window shows scroll bars, the page header and footer scroll out of view as you scroll the contents of the page. The Actions drop-down menu in this template only includes options for Edit Page and Personalize Pages.</td>
</tr>
<tr>
<td>Portal-centric with Top Navigation</td>
<td>11.1.1.6.0</td>
<td>Spaces FX</td>
<td>A page template for portal-centric sites, with flowing layout and top navigation. This page template does not include a footer. 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 scrolls out of view as you scroll the contents of the page.</td>
</tr>
<tr>
<td>Side Navigation (Stretch)</td>
<td>11.1.1.6.0</td>
<td>Spaces FX</td>
<td>A stretching page layout with side navigation. Page and portal actions are available under an Actions menu in the side navigation. When the page shows scroll bars, the side navigation area, page header, and page footer remain in view as you scroll the contents of the page.</td>
</tr>
</tbody>
</table>
### Table 21–1 (Cont.) Built-in Page Templates

<table>
<thead>
<tr>
<th>Name</th>
<th>Release</th>
<th>Preferred Skin</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Top Navigation (Stretch)</td>
<td>11.1.6.0</td>
<td>Spaces FX</td>
<td>A stretching 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 page shows scroll bars, the page header and footer remain in view as you scroll the contents of the page.</td>
</tr>
<tr>
<td>Fusion Side Navigation</td>
<td>11.1.4.0</td>
<td>Fusion FX</td>
<td>A stretching page layout with side navigation. Page and portal actions are available under an Actions menu in the side navigation. When the page shows scroll bars, the side navigation area, page header, and page footer remain in view as you scroll the contents of the page.</td>
</tr>
</tbody>
</table>
A stretching 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 page shows scroll bars, the top navigation area, page header, and page footer remain in view as you scroll the contents of the page.

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 Skyros Top Navigation v2.

<table>
<thead>
<tr>
<th>Name</th>
<th>Release</th>
<th>Preferred Skin</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fusion Top Navigation</td>
<td>11.1.1.4.0</td>
<td>Fusion FX</td>
<td>A stretching 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 page shows scroll bars, the top navigation area, page header, and page footer remain in view as you scroll the contents of the page. 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 Skyros Top Navigation v2.</td>
</tr>
</tbody>
</table>
Table 21–1  (Cont.)  Built-in Page Templates

<table>
<thead>
<tr>
<th>Name</th>
<th>Release</th>
<th>Preferred Skin</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Side Navigation</td>
<td>11.1.4.0</td>
<td>Spaces FX</td>
<td>A flowing page layout with side navigation. Page and portal actions are available under an Actions menu in the side navigation. 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.</td>
</tr>
<tr>
<td>Top Navigation</td>
<td>11.1.4.0</td>
<td>Spaces FX</td>
<td>A default 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 scroll out of view as you scroll the contents of the page.</td>
</tr>
<tr>
<td>Public Pages Template</td>
<td>11.1.4.0</td>
<td>Spaces FX</td>
<td>A default stretching page layout for public pages. There are no page or portal actions or navigation area in this template. When the page shows scroll bars, the page header and footer remain in view as you scroll the contents of the page.</td>
</tr>
</tbody>
</table>
21.2 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. For more information, see Section 20.5.2, "Previewing an Asset."

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. For more information, see Section 21.5, "Setting the Preferred Skin for a Page Template."

---

This section includes the following topics:

- Section 21.2.1, "Setting the Default Page Template for a Portal"
- Section 21.2.2, "Setting the Default Page Template for All Portals"

### 21.2.1 Setting the Default Page Template for a Portal

**Permissions:** To perform this task, you need the portal-level permission Manage Security and Configuration or Manage Configuration. A portal moderator has this permission by default.

For more information about permissions, see Section 29.1, "About Roles and Permissions for a Portal."

Every portal has a set of default assets, including a default page template. When you create a portal, by default, the portal inherits 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 system default page template is used instead.

To use a different page template for the pages in your portal, you can change the default page template setting in portal administration:

- On the Settings page in portal administration (see Section 7.3.1, "Accessing Look and Feel Settings for a Portal"), under Assets, select a new Page Template (Figure 21–2).
21.2.2 Setting the Default Page Template for All Portals

Permissions: To perform this task, you need the application-level permission Portal Server: Manage All or Manage Configuration. A system administrator (Administrator role) has this permission by default.

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 the "Choosing a Default Page Template" section in Administering Oracle WebCenter Portal.

21.3 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.
Creating a Page Template

Note: Creating and editing a page template is a complex task. While you can develop page templates in Portal Builder as described here, the editing capabilities are limited. Oracle recommends that developers use JDeveloper to develop page templates for portals. For existing page templates in WebCenter Portal, a developer can upload them to JDeveloper to further refine and develop them. 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 on through Portal Builder.

For more information, see Section 20.8, "Working with Portal Assets in JDeveloper" and the "Developing Page Templates" chapter in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

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. For more information, see Section 59.2, "Accessing Shared Assets."
   - To create a portal-level page template, go to the Assets page for the portal in which you want to create it. For more information, see Section 20.2, "Accessing Portal Assets."

2. In the left panel, under Structure, click Page Templates.
3. In the toolbar, click Create (Figure 21–3).

Figure 21–3  The Create Icon for Creating a Page Template

4. In the Create New Page Template dialog (Figure 21–4), in the Name field, enter a name for the page template.

   The name is displayed on the Assets or Shared Assets page and in lists when selecting a page template. You should make the name as descriptive as possible.
5. In the **Description** field, enter a description for the page template.
   The description is displayed below the name on 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 as described in Section 20.5.4, "Copying an Asset."

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. For information about publishing a page template, see Section 20.5.3, "Showing and Hiding Assets."
   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 Section 21.4, "Editing a Page Template."

## 21.4 Editing a Page Template

You can edit a page template in WebCenter Portal using Composer to change the layout and structure 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, then edit that copy (see Section 20.5.4, "Copying an Asset").
To edit a page template using Composer in Portal Builder:

1. Navigate to one of the following:
   - To edit an application-level page template, go to the Shared Assets page. For more information, see Section 59.2, "Accessing Shared Assets."
   - To edit a portal-level page template, go to the Assets page for the portal that owns it. For more information, see Section 20.2, "Accessing Portal Assets."

2. In the left panel, under Structure, click Page Templates.

3. Click the Edit quick link (in the Actions column) 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. For more information, see Section 20.4.2, "Editing the Source Code of an Asset."

4. In Composer, edit the layout and the content of the page template as desired.

   Editing the layout and content of a page template is the same as editing the layout and content of a page. For more information, see
   - Chapter 14, "Working with Resource Catalog Components on a Page"
   - Chapter 15, "Working with Web Development Components on a Page"

   A page template must include at least one content region (Box component). You will probably also want to include a region to contain navigation elements. For more information, see Section 21.7, "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. For more information, see Appendix B, "Portal Components."

5. Click the Preview tab to see how your page template looks without all the Composer artifacts. Click the Design tab to return to Design view.

6. Click Save to save your changes.

---

**Note:** Creating and editing a page template is a complex task. While you can develop page templates in Portal Builder as described here, the editing capabilities are limited. Oracle recommends that developers use JDeveloper to develop page templates for portals. For existing page templates in WebCenter Portal, a developer can upload them to JDeveloper to further refine and develop them. 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 on through Portal Builder.

For more information, see Section 20.8, "Working with Portal Assets in JDeveloper" and the "Developing Page Templates" chapter in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.
21.5 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.

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. For more information, see Section 59.2, "Accessing Shared Assets."
   - To set the preferred skin for a portal-level page template, go to the Assets page for the portal that owns it. For more information, see Section 20.2, "Accessing Portal Assets."

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. For more information, see Section 20.5.1, "Viewing Information About an Asset."

7. Click OK.

21.6 Customizing a Shared Page Template for a Portal

Shared page templates (that is, those created at the application level) can also be used in portals. For example, a portal designer may create several corporate page templates for use in portals throughout the application. However, you may find that for a particular portal, the application-level template does not quite work and needs a bit of fine tuning.

One option is to create a copy of the page template within your portal and make the changes you require. However, as soon as you create the copy, the new page template is completely separate from the original. Any changes made to the original page template are not cascaded down to your copy.
Adding Navigation to a Page Template

Alternatively, within your portal you can customize the shared page template. The customizations you make apply only to the page template in the portal in which you perform them. However, the connection to the original page template is retained, so any changes made at the application level are automatically cascaded down to the page template at the portal level.

Note: You cannot customize any of the out-of-the-box page templates. You must first create a copy of the out-of-the-box page template at the application level and then customize the copied version at the portal level.

To customize a shared page template for a portal:

1. Navigate to the Assets page for the portal in which you want to customize the page template.
   For more information, see Section 20.2, "Accessing Portal Assets."
2. In the left panel, under Structure, click Page Templates.
3. Select the page template that you want to customize.
4. In the toolbar, click Actions, and then choose Customize.
5. In Composer, customize the layout and content of the page template as desired.
   For more information, see:
   ■ Chapter 14, "Working with Resource Catalog Components on a Page"
   ■ Chapter 15, "Working with Web Development Components on a Page"
6. Click Save to save your changes.

To remove portal-level customizations from a shared page template, select the page template on the Assets page and choose Restore Default from the Actions menu.

21.7 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:

■ Section 21.7.1, "Adding a Built-in Navigation Task Flow to a Page Template"
■ Section 21.7.2, "Setting Navigation Task Flow Properties"
■ Section 21.7.3, "Downloading Additional Navigation Task Flows"
■ Section 21.7.4, "Designing Advanced Navigation Visualization"

21.7.1 Adding a Built-in Navigation Task Flow to a Page Template

WebCenter Portal provides the following built-in navigation task flows that you can add to page templates:
Adding Navigation to a Page Template

- **Navigation Tree task flow**—Tree navigations display navigational links in a hierarchical structure and often contain multiple-level hierarchies (Figure 21–5). Tree navigations can provide relatively simple access to a complex structure and quite often appear in a left pane in page templates.

  *Figure 21–5  The Navigation Tree Task Flow*
  
  ![Navigation Tree Task Flow](image)

- **Navigation Menu task flow**—Menu navigations display navigational links as a series of tabs, menus, bars, buttons, choices, or as a list (Figure 21–6). 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 21–6  The Navigation Menu Task Flow*
  
  ![Navigation Menu Task Flow](image)

- **Navigation Breadcrumb task flow**—Breadcrumb navigations display a series of horizontal or vertical links that show users their current position in the navigation hierarchy (Figure 21–7). 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 21–7  The Navigation Breadcrumb Task Flow*
  
  ![Navigation Breadcrumb Task Flow](image)

To add a built-in navigation task flow to a page template:

1. Open the page template in Composer (see Section 21.4, "Editing a Page Template").
2. Click the Design tab to enter Design view, which displays the inline resource catalog.
3. 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.

4. Drag the navigation task flow that you want to add to the target area of the page template, or click the Add link to add the task flow to the topmost area of the page template.
5. Click the Edit icon for the navigation task flow.
6. In the Component Properties dialog, set properties as desired.

For information about the properties available for the different navigation task flows, see Section 21.7.2, "Setting Navigation Task Flow Properties."

For some examples of the effects of these properties, see Section 21.7.2.3, "Configure Navigation Task Flows."

7. Click OK.

8. Click Save to save your changes.

### 21.7.2 Setting Navigation Task Flow Properties

The navigation task flows have associated properties, which users with sufficient properties can access from the Component Properties dialog in Composer (Figure 21–9).

This section provides an overview of the navigation task flow properties and steps you through examples of configuring a task flow instance using property values. This section includes the following topics:

- Section 21.7.2.1, "About Navigation Task Flow Properties"
Adding Navigation to a Page Template

- Section 21.7.2.2, "Navigation Task Flow Properties"
- Section 21.7.2.3, "Configure Navigation Task Flows"

For information about accessing the Component Properties dialog, see Section 14.3.2, "Setting Properties on a Component."

21.7.2.1 About Navigation Task Flow Properties

When you set property values on a navigation task flow, you are affecting only the task flow instance on which the value is set. Other instances of the same task flow are not affected by any such changes.

The properties on the Parameters tab of the Component Properties dialog control the default task flow content. For descriptions of the parameters on this tab, see Section 21.7.2.2, "Navigation Task Flow Properties." For some task flows, parameters on this tab facilitate the wiring of the task flow to page parameters and page definition variables. These properties are unique to the task flow type and are covered in this section. For information about wiring pages and components, see Chapter 19, "Wiring Pages, Task Flows, Portlets, and ADF Components."

Changes to the properties on the Display Options, Style, and Content Style tabs affect the appearance and behavior of the task flow for all users. These properties are common to all task flows. For more information, see Section 14.3, "Modifying Component Properties."

The content of the Events tab depends on the events supported by the task flow. For more information, see Section 14.3.7, "Working with Component Contextual Events."

An Expression Editor is available for entering custom values using Expression Language (EL) expression, allowing properties on the Parameters and Display Options tabs to be determined dynamically based on certain criteria. Click the icon next to a property to open the editor. If you need EL assistance, an application developer can provide an EL expression; see the "Expression Language Expressions" appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

---

**Note:** When you enter EL on the generic Display Options tab in the Component Properties 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 14–1.

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

---

21.7.2.2 Navigation Task Flow Properties

The following tables describe the parameters that are unique to each of the built-in navigation task flows.

Table 21–2 describes the parameters for the Navigation Breadcrumb task flow.

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display Style</td>
<td>Specifies whether to display breadcrumbs horizontally or vertically.</td>
</tr>
<tr>
<td>Navigation</td>
<td>The navigation model to associate with this task flow.</td>
</tr>
<tr>
<td>Show Root</td>
<td>Specifies whether to show the start node in the breadcrumbs.</td>
</tr>
</tbody>
</table>
Table 21–3 describes the parameters for the Navigation Menu task flow.

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start Path</td>
<td>The level in the navigation model at which to start the navigation. You can enter a path or an EL expression or click the Select Path icon to select the start node. Valid values are:</td>
</tr>
<tr>
<td></td>
<td>- Start at the Currently Selected Page Path</td>
</tr>
<tr>
<td></td>
<td>- Start at This Level of the Currently Selected Page Path</td>
</tr>
<tr>
<td></td>
<td>- Select Page Path</td>
</tr>
<tr>
<td></td>
<td>For more information, see Section 21.7.2.3.2, &quot;Selecting the Navigation Start Path.&quot;</td>
</tr>
</tbody>
</table>

Note: The Navigation Menu task flow is limited to showing a maximum of two levels of navigation items.
Table 21–3  (Cont.) Navigation Menu Task Flow Parameters

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
</table>
| **Style** | The style for rendering the first level of navigation items. Valid values are Tabs, Bar, Buttons, Choice, List, Menu, Menu with Sub-Menus. Notes:  
  - If the resource being rendered is non-navigable, for example, a folder, then it cannot be displayed as a tab, bar, button, choice, or list. It can be displayed only if the style Menu or Menu with Sub-Menus is selected.  
  - If a navigable item is rendered using the Menu with Sub-Menus style, the item is rendered twice, once as a drop-down menu, and once as a link to the item itself. |

Table 21–4 describes the parameters for the Navigation Tree task flow.

Table 21–4  Navigation Tree Task Flow Parameters

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Navigation</strong></td>
<td>The navigation model to associate with this task flow.</td>
</tr>
<tr>
<td><strong>Show Icons</strong></td>
<td>Specifies whether to render icons for each resource.</td>
</tr>
</tbody>
</table>
| **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 with the Style property set to Collapsed Tree. If the Style property is set to Expanded Tree then all nodes are shown expanded regardless of the value of this property. |
| **Show Root** | Specifies whether to render the start node in the tree. Valid values are:  
  - Do Not Show Root—Do not render the start node  
  - Show Root—Render the start node  
  - Show Root As Box—Render the start node as the header in a box |
| **Start Path** | The level in the navigation model at which to start the navigation. You can enter a path or an EL expression or click the Select Path icon to select the start node. Valid values are:  
  - Start at the Currently Selected Page Path  
  - Start at This Level of the Currently Selected Page Path  
  - Select Page Path  
  For more information, see Section 21.7.2.3.2, “Selecting the Navigation Start Path.” |
21.7.2.3 Configure Navigation Task Flows

This section includes the following topics:

- Section 21.7.2.3.1, "Navigation Model"
- Section 21.7.2.3.2, "Selecting the Navigation Start Path"
- Section 21.7.2.3.3, "Rendering Navigation as a Tree"
- Section 21.7.2.3.4, "Rendering Navigation as a Menu"
- Section 21.7.2.3.5, "Rendering Navigation as Breadcrumbs"
- Section 21.7.2.3.6, "Linking Navigation Task Flows"

21.7.2.3.1 Navigation Model

The following sections use examples based on the sample navigation shown in Figure 21–10.

![Sample Navigation](image)

21.7.2.3.2 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 your portal, as described in Section 21.7.1, "Adding a Built-in Navigation Task Flow to a Page Template."

2. In the Parameters tab of the Component Properties dialog, next to the Start Path field, 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:

  \[\texttt{#{navigationContext.navigationModel['modelPath=path'].currentSelection.prettyUrl}}\]

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

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

  In our banking application example, if this option is selected, when the user navigates to the Current Accounts page, the navigation looks as shown in Figure 21–11.

  ![Figure 21–11](image)

- **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:

  \[\texttt{#{navigationContext.navigationModel['modelPath=path'].currentSelection.prettyUrlPath[level]}}\]

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

  In our banking application example, if this option is selected with the value of 1, when the user navigates to the Personal Banking page, and then the Current Accounts page, the navigation starts at the first level of this path, that is, Personal Banking Figure 21–12.

  ![Figure 21–12](image)
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.

21.7.2.3 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 your portal, as described in Section 21.7.1, "Adding a Built-in Navigation Task Flow to a Page Template."

2. Select the Start Path for the navigation when it is rendered on the page, as illustrated in Section 21.7.2.3.2, "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 with 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 21–13).

   ▪ Do Not Show Root to not include the Current Account node (Figure 21–14).

   ▪ Show Root As Box to include the Current Account node as the header of a box that contains the rest of the navigation (Figure 21–15).
5. From the Style drop-down list, select what style to use for the tree.
   - **Collapsed Tree** displays the tree initially collapsed according to the levels specified by the Show Levels property.
   - **Expanded Tree** displays the tree with all levels completely expanded.
   - **List** displays the tree as a flat list of the top-level 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.

Using our banking example, if the start node is Personal Banking, a tree navigation with the List style looks like Figure 21–16.

![Figure 21–16 List Style Tree with No Folders](image)

However, if the start node is Current Account (which contains two folders), it looks like Figure 21–17.

![Figure 21–17 List Style Tree with Folders](image)

6. Select Show Icons to display the icons associated with the navigation items in the tree (Figure 21–18).

![Figure 21–18 Show Icons](image)

### 21.7.2.3.4 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 your portal, as described in Section 21.7.1, "Adding a Built-in Navigation Task Flow to a Page Template."

2. Select the Start Path for the navigation when it is rendered on the page, as illustrated in Section 21.7.2.3.2, "Selecting the Navigation Start Path."

3. From the Style drop-down list, select how you want to display the first level of navigation items in the menu. Using our sample banking application, we can illustrate the different options for this property:
   - **Tabs**
Figure 21–19  Tabs Menu Navigation Style

- Bar

Figure 21–20  Bar Menu Navigation Style

- Buttons

Figure 21–21  Buttons Menu Navigation Style

- Choice

Figure 21–22  Choice Menu Navigation Style

- List

Figure 21–23  List Menu Navigation Style

- Menu

Figure 21–24  Menu Navigation Style

4. From the Second Level Style drop-down list, select the style to use for the second level of navigation items.

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.

### 21.7.2.3.5 Rendering Navigation as Breadcrumbs

To render your navigation as breadcrumbs:

1. Add the Navigation Breadcrumb task flow to the page template use by your portal, as described in **Section 21.7.1, "Adding a Built-in Navigation Task Flow to a Page Template."**
2. Select the **Start Path** for the navigation when it is rendered on the page, as illustrated in **Section 21.7.2.3.2, "Selecting the Navigation Start Path."**
3. Select **Show Root** to display the start node in the breadcrumbs.
4. From the **Display Style** drop-down list, select whether to display the breadcrumbs vertically or horizontally, for example **Figure 21–25** shows breadcrumbs displayed horizontally.

**Figure 21–25** **Horizontal Breadcrumbs**

[Image of horizontal breadcrumbs]

**Figure 21–26** shows breadcrumbs displayed vertically.

**Figure 21–26** **Vertical Breadcrumbs**

[Image of vertical breadcrumbs]

### 21.7.2.3.6 Linking Navigation Task Flows

You may want to include more than one area of navigation in your portal. For example, you might want to include tabs along the top of the page, displaying the top level of your navigation, and a second tree structure down the side of the page. You can link the navigation task flows together so that the tree navigation reflects the selected navigation item in the tabbed menu.

The following procedure shows how to do this using our banking example.

To link navigation task flows:

1. Add the Navigation Menu task flow to a region along the top of the page template used by your portal, as described in **Section 21.7.1, "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 application's page template, as described in **Section 21.7.1, "Adding a Built-in Navigation Task Flow to a Page Template."**
3. Hover the mouse over the Navigation Menu task flow and, in the menu that pops up, click the **Edit** icon (wrench) for the task flow.

   **Tip:** Ensure that you click the **Edit** icon for the task flow and not the one for the region that contains the task flow.

4. In the Component Properties dialog, click the **Parameters** tab.
5. 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 the "Expression Language Expressions” appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

6. In the Start Path parameter, enter / to start at the root of the navigation model.

7. From the Style drop-down list, select Tabs.

8. From the Second Level Style drop-down list, select Do Not Display.

   This restricts this part of the navigation to display only the top level of the navigation model. The rest of the navigation model is displayed in the tree navigation.

9. Click OK.

10. Hover the mouse over the Navigation Tree task flow and, in the menu that pops up, click the Edit icon (wrench) for the task flow.

11. In the Component Properties dialog, click the Parameters tab.

12. 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.

13. Next to the Start Path field, click the Select Path icon.

14. 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.

15. 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.

16. Click OK.

17. Save and close the page template.

   Figure 21–27 shows how the above procedure might work for our banking example. Selecting the Personal Banking tab at the top of the page displays the rest of the navigation model (from Personal Banking down) on the side of the page.

Figure 21–27  Linking Navigation Task Flows

<table>
<thead>
<tr>
<th>Personal Banking</th>
<th>Private Banking</th>
<th>Business Banking</th>
<th>Commercial Banking</th>
</tr>
</thead>
<tbody>
<tr>
<td>▼ Current Account</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>▼ Our Accounts</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>▼ Regular Current Accounts</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>▼ Accounts with Extras</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>▼ New Customers</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>▼ Savings</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>▼ Investments</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>▼ Loans</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

21.7.3 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 EAR files to your application, as described in Section 20.5.8, "Uploading an Asset." The task flows are then available in the resource catalog under Mash-Ups, Task Flows.

### 21.7.4 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 fairly complex task. As such 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 Section 20.8, "Working with Portal Assets in JDeveloper."

For information about specific considerations for creating page templates in JDeveloper for use in WebCenter Portal, see the "Working with WebCenter Portal Resources" chapter in *Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper*.

For information about how to programmatically add navigation UI to your page templates using JDeveloper, see the "Visualizing Portal Navigation" section in *Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper*.

### 21.8 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:** Section 20.2, "Accessing Portal Assets" and Section 59.2, "Accessing Shared Assets"

- **Create**—For more information, see Section 21.3, "Creating a Page Template."

- **Delete**—You can delete a page template when it is no longer required.
Managing a Page Template

For more information, see Section 20.5.9, "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 Section 20.5.8, "Uploading an Asset."

- **Download**—You can download a page template into an archive file for further development in JDeveloper.
  For more information, see Section 20.5.7, "Downloading an Asset."

- **Actions**
  - **Copy**—You can create a copy of a page template.
    For more information, see Section 20.5.4, "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 Section 20.5.6, "Setting Security for an Asset."
  - **Customize**—For more information, see Section 21.6, "Customizing a Shared Page Template for a Portal."
  - **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 Section 20.5.1, "Viewing Information About an Asset."
  - **Edit Source**—You can directly edit the source code of a page template.
    For more information, see Section 20.4.2, "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 Section 20.5.5, "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 Section 20.5.2, "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 Section 20.5.3, "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 Section 20.5.5, "Setting Properties on an Asset."

- **Edit**—For more information, see Section 21.4, "Editing a Page Template."
This chapter describes how to create, modify, and manage a navigation model in WebCenter Portal.

This chapter includes the following topics:

- Section 22.1, "About Portal Navigation"
- Section 22.2, "Creating a Navigation Model"
- Section 22.3, "Editing a Navigation Model"
- Section 22.4, "Rendering a Navigation Model"
- Section 22.5, "Managing a Navigation Model"
- Section 22.6, "Use Case Examples"

Permissions: To perform the tasks in this chapter on shared navigation models, you need the application-level permission Create, Edit, and Delete Navigations. Users with the Application Specialist role have this permission by default. For more information about application-level permissions, see the "About Application Roles and Permissions" section in Administering Oracle WebCenter Portal.

To perform the tasks in this chapter on portal-level navigation models, you need the portal-level permission Create, Edit, and Delete Assets (standard permissions) or Create, Edit, and Delete Navigations (advanced permissions). For more information about portal-level permissions, see Section 29.1, "About Roles and Permissions for a Portal."

For information about how to visualize a navigation model within a page template, see Section 21.7, "Adding Navigation to a Page Template."

22.1 About Portal Navigation

Navigation is a fundamental aspect of your portal. Users need to be able to see what is available in the portal, move around the portal, and orient themselves within the portal.

Navigation is essentially a set of links pointing to the pages in the portal, and potentially other portal content or external items. Examples of navigation include:

- A series of tabs or menus along the top of each page
About Portal Navigation

**Figure 22–1  Navigation Rendered Along the Top of a Page**

- A tree structure or list of links on the side of each page

**Figure 22–2  Navigation Rendered on the Side of a Page**

- A trail of breadcrumbs showing the location of the current page within the portal's structure
In WebCenter Portal, you can break portal navigation down into two main concepts:

- The navigation model defines the content, structure, and metadata of the portal navigation. For more information, see Section 22.1.1, "About the Portal Navigation Model."

- The navigation visualization determines how the navigation appears on the pages of the portal, say as a menu, a tree, or breadcrumbs. For more information, see Section 22.1.2, "About Navigation Visualization."

22.1.1 About the Portal Navigation Model

The portal navigation model defines the content, structure, and metadata of the portal navigation. When you create a portal, a navigation model called Portal Default Navigation Model is created for the portal. When you add a page to the portal in the portal editor, that page is automatically added to the portal’s navigation model. This keeps the navigation model automatically synchronized with the structure of your portal. You can also use the portal editor to add other navigation items, such as content and external links.

Note: You cannot assign a different navigation model to a portal, however you can edit the Portal Default Navigation Model to add other items to it, including references to other navigation models.

The navigation model is aware of the security policies that have been applied to the navigation items that it displays. For example, if the current user is not authorized to see a particular page, the navigation model hides any navigational links to that page. Navigation model metadata can also be determined contextually using EL expressions. These expressions are evaluated at runtime to determine exactly which pieces of the navigation model are rendered in the navigation visualization and to whom.

Other navigation models can be imbedded in the Portal Default Navigation Model as a Navigation Reference (see Section 22.3.3, "Adding Items to a Navigation Model"). If a navigation model is a shared asset (available to all portals), it is shown on the Assets page of all portals along with portal-specific navigation models.
22.1.2 About Navigation Visualization

The navigation visualization determines how the navigation model should appear in the portal. For example, portal navigation can be provided as a set of tabs along the top of each page, or perhaps as a tree-like structure down the side of the page.

Navigation visualization is built into the page template. To change the way your portal navigation appears, you should first consider choosing a different page template.

If you cannot find a page template that meets your requirements for portal navigation, you can create a new page template in which to design your preferred navigation visualization.

For more information about navigation visualization, see Section 21.7, "Adding Navigation to a Page Template."

22.2 Creating a Navigation Model

When you create a portal, a navigation model called Portal Default Navigation Model is created for the portal. You can edit this navigation model as required to define your portal's navigation. For more information, see Section 22.3.1, "Editing the Portal Default Navigation Model in the Portal Editor."

While in the majority of cases, the Portal Default Navigation Model should be the only navigation model you need, in some circumstances you may want to create additional navigation models. For example, if there are some items that you want to be available in multiple portals, you can create an application-level navigation model that contains all those items and then reference the application-level navigation model within each individual portal's Portal Default Navigation Model.

When you create a navigation model, you can create an entirely new one or use an existing navigation model as a starting point.

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

**Note:** Portal pages are only automatically added to the Portal Default Navigation Model. If you want to include a portal's pages within a navigation model that you create, you must add them to the navigation model yourself, or add a Pages Query item to the navigation model.

To create a navigation model:

1. Navigate to one of the following:
   - To create an application-level navigation model, go to the Shared Assets page. For more information, see Section 59.2, "Accessing Shared Assets."
   - To create a portal-level navigation model, go to the Assets page for the portal in which you want to create the navigation model. For more information, see Section 20.2, "Accessing Portal Assets."


3. In the toolbar, click Create.
4. In the Create New Navigation dialog (Figure 22–4), in the Name field, enter a name for the navigation model.

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

Figure 22–4  The Create New Navigation Dialog

5. In the Description field, enter a description for the navigation model.

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

6. From the Copy From drop-down list, select an existing navigation model to use as the starting point for your new navigation model, if desired. If you leave this blank, an empty navigation model is created.

   **Tip:** You can also create a copy of an existing navigation model as described in Section 20.5.4, "Copying an Asset."

7. Click Create.

The newly created navigation model is listed on the Assets or Shared Assets page. The empty check box in the Available column indicates that the navigation model is not yet published and hence is not available to other users. To publish the navigation model, select the check box. For more information see Section 20.5.3, "Showing and Hiding Assets."

### 22.3 Editing a Navigation Model

When you add new pages in the portal editor, they are automatically added to the portal’s navigation model (Portal Default Navigation Model). You can also add other navigation items.

**Note:** If you create other navigation models, you can edit them on the Assets page (for portal-level navigation models) or Shared Assets page (for application-level navigation models). However this is not the recommended method of editing the Portal Default Navigation Model.

This section includes the following topics:
22.3.1 Editing the Portal Default Navigation Model in the Portal Editor

To edit the Portal Default Navigation Model in the portal editor:

1. In the portal editor (see Section 6.1, "Opening the Portal Editor"), click the Pages tab.

2. To add an item to the portal navigation, click the Add icon, then select the type of item that you want to add:
   - To add an existing portal page to the portal navigation, see Section 13.2, "Adding an Existing Page to the Portal Navigation."
   - To create and add a new page, subpage, or page variant (for device groups) to the portal navigation, see Section 12.2, "Creating Pages or Subpages in a Portal" and Section 12.3, "Creating a Page Variant for a Device Group."
   - To add other items to the portal navigation, see Section 22.3.3, "Adding Items to a Navigation Model."

3. To edit an existing item:
   a. Click the view switcher to Data.
   b. Select the item that you want to edit.
   c. For pages, click the Advanced tab.
   d. Edit the properties as desired.
      For more information, see Section 22.3.4, "Setting Properties for an Item in the Navigation Model."
   e. Click Save.

4. To move an existing item within the navigation model, select the item, click the Move icon, then select Move Up or Move Down icon. Repeat as necessary until the item is in the desired location.

   Tip: You can also move an item by selecting it and dragging it to the desired location.

5. To indent an item under another, move the child item so that it is immediately below the parent item, click the Move icon, then select Indent.

   Note: If you indent an item under another item, the parent item is no longer navigable.

   To move an indented item so that it is no longer indented below another item, select the indented item, click the Move icon, then select Outdent.

6. To copy an existing item, right-click the item, then select Copy.

   A copy of the item is placed just below the selected item. You can edit the new item and change its properties, as described in Section 22.3.4, "Setting Properties for an Item in the Navigation Model."
for an Item in the Navigation Model.”

7. To hide an item from the portal navigation, without deleting it:
   - For pages, see Section 13.9, "Showing or Hiding a Page in the Portal Navigation."
   - For non-page navigation items, deselect the Visible property, as described in Section 22.3.4, "Setting Properties for an Item in the Navigation Model."

8. To delete an existing item from the navigation model, right-click the item, then select Delete.

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

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

---

### 22.3.2 Editing a Navigation Model on the Assets or Shared Assets Page

If you want to edit the Portal Default Navigation Model, it is strongly recommended that you use the portal editor, as described in Section 22.3.1, "Editing the Portal Default Navigation Model in the Portal Editor."

However, if you create other navigation models (see Section 22.2, "Creating a Navigation Model"), you can edit them on the Assets page (for portal-level navigation models) or Shared Assets page (application-level navigation models). For example, if there are some items that you want to be available in multiple portals, you can create an application-level navigation model that contains all those items and then reference the application-level navigation model within each individual portal's Portal Default Navigation Model.

To edit a navigation model on the Assets or Shared Assets page:

1. Navigate to one of the following:
   - To edit an application-level navigation model, go to the Shared Assets page. For more information, see Section 59.2, "Accessing Shared Assets."
   - To edit a portal-level navigation model, go to the Assets page for the portal that owns it. For more information, see Section 20.2, "Accessing Portal Assets."

2. In the left panel, under Structure, click Navigations.

3. Click the Edit quick link in the row for the navigation model that you want to edit.

4. To add an item to the navigation model, click the Add icon, then select the type of item that you want to add. For more information, see Section 22.3, "Editing a Navigation Model."

5. To edit an existing item:
   a. Select the item, then click the Edit icon.
   b. Edit the properties as desired. For more information, see Section 22.3.4, "Setting Properties for an Item in the Navigation Model."
   c. Click OK.

6. To move an existing item within the navigation model, select the item, then click the Move Up or Move Down icon as many times as necessary until the item is in the desired location.
Tip: You can also move an item by selecting it and dragging it to the desired location.

7. To indent an item under another, move the child item so that it is immediately below the parent item and click the **Indent** icon.

   To move an indented item so that it is no longer indented below another item, select the indented item and click the **Outdent** icon.

8. To copy an existing item, select the item, then click the **Copy** icon.

   A copy of the item is placed just below the selected item. You can edit the new item and change its properties, as described in Section 22.3.4, "Setting Properties for an Item in the Navigation Model."

9. To delete an existing item from the navigation model, select the item, then click the **Delete** icon.

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

10. Click **Save and Close**.

### 22.3.3 Adding Items to a Navigation Model

You can add many different types of item to a navigation model. Mostly, a navigation model 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, depending on the page template used for your portal, 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 navigation model to group similar nodes together and reduce the number of nodes displayed at any one level of the navigation model.

---

To add items to a navigation model:

1. Edit the navigation model. For more information, see one of the following:
   - To edit the Portal Default Navigation Model, open the portal editor. For more information, see Section 22.3.1, "Editing the Portal Default Navigation Model in the Portal Editor."
   - To edit any other navigation model, use the Assets or Shared Assets page. For more information, see Section 22.3.2, "Editing a Navigation Model on the Assets or Shared Assets Page."

2. Click the **Add** icon, then select the type of item that you want to add:
   - (Portal editor only) **New Page, New Subpage, New Page Variant** to add a new page, subpage, or page variant (for device groups) (see Section 12.2,
"Creating Pages or Subpages in a Portal" and Section 12.3, "Creating a Page Variant for a Device Group")

- (Portal editor only) **Page Link** to add an existing page (see Section 13.2, "Adding an Existing Page to the Portal Navigation")
- **Content Item** to add a document
- **Content Query** to add a collection of documents that meet specific query criteria
- **Link** to add a link to a web page, portal page, portlet, task flow, or external application
- **Pages Query** to add a list of pages
- **Portal Query** to add a list of subportals
- **Navigation Reference** to embed another navigation model
- **Folder** to add a folder to the portal navigation
- **Separator** to add a separator to the portal navigation

  **Tip:** To add an item within a folder, select the folder first and then click **Add**.

3. Edit the properties as desired.

   For more information, see Section 22.3.4, "Setting Properties for an Item in the Navigation Model."

4. Click **OK** to add the item to the navigation model.

### 22.3.4 Setting Properties for an Item in the Navigation Model

You can specify various properties and display options for non-page navigation items 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 Section 13.16, "Setting Navigation Properties and Display Options for a Page."

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

1. Edit the navigation model, and select an item:

   - Section 22.3.1, "Editing the Portal Default Navigation Model in the Portal Editor"
   - Section 22.3.2, "Editing a Navigation Model on the Assets or Shared Assets Page"

2. On the **Target** tab, specify information about the item. Table 22–1 lists the fields available for all the different item types.

   **Tip:** All fields in the Edit dialog accept EL expressions. If you need EL assistance, an application developer can provide an EL expression; see the "Expression Language Expressions" appendix in *Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper*. 
Table 22–1  Fields for Specific Navigation Model Items

<table>
<thead>
<tr>
<th>Field</th>
<th>Applies to</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ID</td>
<td>All item types</td>
<td>Enter a unique ID for the item. This field 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 navigation model, you may want to change it to something more descriptive. The ID must be unique within the navigation model. The first character must be either an uppercase or lowercase letter or the underscore character (<em>). Subsequent characters can be any alphanumeric character or a dash (-), period (.), or underscore (</em>). If the item is at the top level of the navigation model, the ID must not be wc_navtitle or wcnav_externalld. These IDs are reserved.</td>
</tr>
<tr>
<td>Name</td>
<td>All item types</td>
<td>Enter a name to display for the item in the navigation model.</td>
</tr>
<tr>
<td>Description</td>
<td>All item types</td>
<td>Enter a brief description of the item.</td>
</tr>
</tbody>
</table>
| Visible           | All item types      | Select to display a node for this item when the navigation model 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 Moderator role, use the following EL expression: #{WCSecurityContext.userInScopedRole['Moderator']}
|                   |                     | If you need EL assistance, an application developer can provide an EL expression; see the "Expression Language Expressions" appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper. |
| Path              | Content Item        | Enter an external URL, or click the search icon to select a target resource to include in the portal navigation. Note: In the Select dialog, the Select button is active only when you select an item that can be included in the navigation model. For example, if you expand the Portlets node and select a portlet producer, then the Select button is disabled. If you expand the portlet producer and select a portlet, then the Select button is enabled. |
|                   | Link                |                                                                                                                                             |
|                   | Page Link           |                                                                                                                                             |
| Content Presenter | Content Item        | Select the Content Presenter display template to use to render the document when it is selected in the navigation. For more information about Content Presenter, see Chapter 33, "Publishing Content Using Content Presenter." |
| Template          |                     |                                                                                                                                               |
Table 22–1 (Cont.) Fields for Specific Navigation Model Items

<table>
<thead>
<tr>
<th>Field</th>
<th>Applies to</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Hide Top-Level Folder</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Content Query</td>
<td></td>
<td>Select to display the results of the query or reference directly rather than displaying them under a folder.</td>
</tr>
<tr>
<td>Pages Query</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Portal Query</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Navigation Reference</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Page Template</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Content Item</td>
<td></td>
<td>Select the page template to use to display the item when it is selected in the portal navigation.</td>
</tr>
<tr>
<td>Link</td>
<td></td>
<td>Select [system default] to use the portal or application default page template.</td>
</tr>
<tr>
<td>Page Link</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pages Query</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Query String</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Content Query</td>
<td></td>
<td>Enter the query criteria to identify the content to include in the navigation model, for example:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>SELECT * FROM cmis:document WHERE cmis:name LIKE 'Foo%'</td>
</tr>
<tr>
<td></td>
<td></td>
<td>For more information about how to format the query and for more examples, see the &quot;Content Management REST API&quot; chapter in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.</td>
</tr>
<tr>
<td><strong>Find Pages in</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pages Query</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Page Style</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pages Query</td>
<td></td>
<td>Select the style of page to include in the navigation model. For example, if you select Wiki, only pages that use the Wiki page style are included in the navigation model.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Select [system default] to display all pages, regardless of style.</td>
</tr>
</tbody>
</table>
On the **Options** tab, set the navigation model display options for the item. For more information, see Table 22–2.
### Table 22–2  Navigation Model Item Display Options

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access Key</td>
<td>Enter a key mnemonic (single character) that can be used to access the navigation item without using the mouse.</td>
</tr>
<tr>
<td>Icon URI</td>
<td>Enter a path and file name of an image to use to represent the item in the navigation model.</td>
</tr>
<tr>
<td>Search Keywords</td>
<td>Enter keywords to facilitate searching of the navigation item.</td>
</tr>
<tr>
<td>Tool Tip</td>
<td>Enter brief descriptive text to display when users hover the mouse over the item in the navigation model.</td>
</tr>
</tbody>
</table>
| External ID     | Enter an ID to enable a direct reference to the item from a static link in the page. Navigation items in the portal’s default navigation model with this attribute defined can be accessed using `/faces/wcnav_ externalId/externalId` from an `af:goLink` component in a page or by using `/wcnav_externalId/externalId` from an External Link navigation item in the navigation model. The alternative is to access the node by its hierarchy, which is faster, but may change as the application develops. **Tip:** To directly access a node in the default navigation model 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
```

To directly access a node in a non-default navigation model, you must specify the path of the navigation model by setting the `wcnav.modelPath` URL parameter, for example:

```
/faces/wcnav_externalId/myNavigationItem?wcnav.model=/oracle/webcenter/sitesources/scopedMD/s7f446cab_f622_4b68_a83e_b7eaf28b52ec/navigation/gsr0271c712_721a_4565_9f0e_755784a7093b/myNavigation.xml
```

Depending on where you are using the link, you may need to encode the URL parameters (for example, if the External ID contains spaces or special characters, such as `%2Fspaces%2FmyProjectSpace`). |
| Open Link in    | Select where to display the navigation item when it is selected. The options available depend on the type of navigation item. **Note:** Popups are not supported for pages. |
| Redirect        | Select to redirect the URL specified for the item. If you do not select this option, then the URL is rendered within the current page template. **Tip:** This display option is available for all items except for Navigation Reference, Folder, and Separator. For Link items that point to business role pages (for example, the My Profile page), Redirect has no effect; clicking the link always displays the page in the Home portal. For Link and Page Link items that point to a page in a different portal, you must select Redirect to open the page inside the portal to which the page belongs. You cannot view another portal’s page in the current portal, but you can redirect there to view the other portal’s page in that portal. |
22.4 Rendering a Navigation Model

For information about how to render a navigation model in your portal, including how to use the built-in navigation task flows, see Section 21.7, "Adding Navigation to a Page Template."

22.5 Managing a Navigation Model

The following options are available on the Assets or Shared Assets page to enable you to manage navigation models:

- **Create**—For more information, see Section 22.2, "Creating a Navigation Model."
- **Delete**—You can delete a navigation model when it is no longer required.
  
  For more information, see Section 20.5.9, "Deleting an Asset."

  **Note:** You can delete a navigation model even if it is referenced in navigation components, page templates, pages, other navigations, and so on, so caution should be taken.

  You cannot delete the Portal Default Navigation Model.

- **Upload**—You can upload an archive file that contains a navigation model that has been developed in another portal or in JDeveloper.
  For more information, see Section 20.5.8, "Uploading an Asset."

- **Download**—You can download a navigation model into an archive file for uploading into another portal or for importing into JDeveloper.
  For more information, see Section 20.5.7, "Downloading an Asset."

- **Actions**
  - **Copy**—You can create a copy of a navigation model. You can use this feature when you want to back up a navigation model, or update a navigation model while keeping the original in use.
For more information, see Section 20.5.4, "Copying an Asset."

- **Security Settings**—You can control whether all users or only specific users or groups can access the navigation model.
  For more information, see Section 20.5.6, "Setting Security for an Asset."

- **Show Properties**—Each navigation model has an associated Show Properties dialog that summarizes useful information about it.
  For more information, see Section 20.5.1, "Viewing Information About an Asset."

- **Edit Source**—You can directly edit the source code of a navigation model.
  For more information, see Section 20.4.2, "Editing the Source Code of an Asset."

- **Edit Properties**—Each navigation model 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 Section 20.5.5, "Setting Properties on an Asset."

- **Available**—You can control whether or not a navigation is available for use in a portal by selecting or deselecting this check box.
  For more information, see Section 20.5.3, "Showing and Hiding Assets."

  **Tip:** In addition to showing or hiding a navigation model, you can also control whether a shared navigation model is available to any, all, or selected portals in WebCenter Portal. For more information, see Section 20.5.5, "Setting Properties on an Asset."

- **Edit**—For more information, see Section 22.3, "Editing a Navigation Model."

### 22.6 Use Case Examples

Table 22–3 provides solutions to common navigation scenarios, and refers to documentation that provides the information you need.
### Table 22–3 Common Navigation Use Cases

<table>
<thead>
<tr>
<th>If I want to....</th>
<th>What do I need to understand and do?</th>
</tr>
</thead>
</table>
| In my portal navigation, create a nested hierarchy | You can create a two-level hierarchy in your portal navigation in either of the following ways:  
  - Create subpages, which by default automatically adds them to the portal hierarchy beneath their parent page. See Section 12.2.2, "Creating a Page or Subpage in an Existing Portal."  
| 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 created (see Section 12.2.2, "Creating a Page or Subpage in an Existing Portal"). 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 Section 1.3.7, "What Are Pages?"  
If a portal 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 Section 13.9, "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:  
  - Edit the portal, click the Add icon, and select Page Link.  
  - Select any of the available pages to add the page to your navigation.  
  - The page is added to the portal navigation:  
    ![Image](image_url)  
See also, Section 13.2, "Adding an Existing Page to the Portal Navigation." |
### Table 22–3  (Cont.) Common Navigation Use Cases

<table>
<thead>
<tr>
<th>If I want to....</th>
<th>What do I need to understand and do?</th>
</tr>
</thead>
</table>
| 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:  
- Edit the portal or in portal administration, click the Add icon, and select Link.  
- Set the Path property to the URL of the target 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:  
![Projected Sales for 2014](image)  
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:  
![Projected Sales for 2014](image)  
**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. |
| In my portal navigation, add non-page navigation items, such as content item, content query, navigation reference, folder, separator, and so on | See Section 22.3.3, "Adding Items to a Navigation Model."  
**Note:** If you create a Content Item link to a document/wiki, the target will not expose editing controls. |
### Use Case Examples

**Table 22–3 (Cont.) Common Navigation Use Cases**

<table>
<thead>
<tr>
<th>If I want to...</th>
<th>What do I need to understand and do?</th>
</tr>
</thead>
<tbody>
<tr>
<td>In my portal navigation, create a menu or label, which can be expanded to reveal associated target locations</td>
<td>Edit the portal or in portal administration, click the <strong>Add</strong> icon, and select <strong>Folder</strong>. Name the folder, then add beneath it navigation items such as page links, links, or a navigation model that you defined (see Section 22.2, &quot;Creating a Navigation Model&quot;). You can also drag and drop existing navigation items under the folder.</td>
</tr>
<tr>
<td><img src="image" alt="Diagram of portal navigation" /></td>
<td>The menu is added to your portal navigation:</td>
</tr>
<tr>
<td><img src="image" alt="Diagram of portal navigation" /></td>
<td>See also, Section 22.3.3, &quot;Adding Items to a Navigation Model.&quot;</td>
</tr>
<tr>
<td>In my portal navigation, delete a page (without deleting the page itself)</td>
<td>To hide a page in the navigation, see Section 13.9, &quot;Showing or Hiding a Page in the Portal Navigation.&quot; <strong>Note:</strong> To delete a page, see &quot;Section 13.5, &quot;Deleting a Page.&quot;</td>
</tr>
</tbody>
</table>
| 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 "Section 7.3.2, "Changing the Page Template for a Portal."
See also, Section 21.1.1, "About Built-in Page Templates." |
This chapter describes how to create, modify, and manage a resource catalog in WebCenter Portal.

This chapter includes the following topics:

- Section 23.1, "About Resource Catalogs"
- Section 23.2, "About the Resource Registry"
- Section 23.3, "Setting the Default Resource Catalogs"
- Section 23.4, "Creating a Resource Catalog"
- Section 23.5, "Editing a Resource Catalog"
- Section 23.6, "Managing a Resource Catalog"

Permissions: To perform the tasks in this chapter on shared resource catalogs, you need the application-level permission Create, Edit, and Delete Resource Catalogs. Users with the Application Specialist role have this permission by default. For more information about application-level permissions, see the "About Application Roles and Permissions" section in Administering Oracle WebCenter Portal.

To perform the tasks in this chapter on portal-level resource catalogs, you need the portal-level permission Create, Edit, and Delete Assets (standard permissions) or Create, Edit, and Delete Resource Catalogs (advanced permissions). For more information about portal-level permissions, see Section 29.1, "About Roles and Permissions for a Portal."

23.1 About Resource Catalogs

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

If a resource catalog is a shared asset (available to all portals), it is shown on the Shared Assets page, and also on the Assets page of all portals along with portal-specific resource catalogs.

In the page editor Design view and Select view, the resource catalog is embedded into the editor by default. You can drag components from the inline resource catalog, or click Add to add a component by default as the first child component inside the current Box component.
If you choose, you can hide the inline resource catalog in Design view to expose Add Content buttons that identify areas of the page where you can add content. When you click Add Content, the resource catalog displays standalone in the Add Content dialog. When you add a component from the Add Content dialog, it is added as the first child component inside the current Box component.

A resource catalog is organized into folders and subfolders to categorize resources. Folders have an Open link next to them and resources have an Add link (Figure 23–1). When a resource has both Open and Add links next to it, it means you can place that resource on a page or place a subset of that resources on a page. For example, you can place the Personal Documents component on a page to display a list of all personal documents; or you can open the Personal Documents folder in the resource catalog and add a specific file to the page.

**Figure 23–1  Open and Add Links in a Resource Catalog**

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.
23.1.1 Built-in Resource Catalogs

WebCenter Portal includes three built-in resource catalogs:

- Default Portal Catalog
- Default Home Portal Catalog
- Default Page Template Catalog

<table>
<thead>
<tr>
<th>Table 23–1 Built-in Resource Catalogs</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Default Portal Catalog</strong></td>
</tr>
<tr>
<td>The Default Portal Catalog is assigned to portals by default. It contains resources to add to pages and task flows in a portal.</td>
</tr>
</tbody>
</table>

The Integration category is available in the Default Portal Catalog only when one or more data controls have been created.
### About Resource Catalogs

#### Table 23–2  Resources in the Default Home Portal Resource Catalog

<table>
<thead>
<tr>
<th>Folder</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alerts and Updates</td>
<td>Includes task flows to track alerts and notifications:</td>
</tr>
<tr>
<td></td>
<td>- <strong>Activity Stream</strong> and <strong>Activity Stream - Quick View</strong> to view activities of your connections, actions taken in portals, and business activities. For more information, see Chapter 41, &quot;Adding Activities to a Portal.&quot;</td>
</tr>
<tr>
<td></td>
<td>- <strong>Announcements</strong> to view current portal announcements. For more information, see Chapter 43, &quot;Adding Announcements to a Portal.&quot; This resource is available in the Default Portal Catalog only when Announcements are enabled in the portal (see Section 39.2, &quot;Enabling and Disabling Tools and Services Available to a Portal&quot;).</td>
</tr>
<tr>
<td></td>
<td>- <strong>Popular Topics</strong> and <strong>Recent Topics</strong> to list the most frequently and most recently accessed topics. For more information, see Chapter 46, &quot;Adding Discussion Forums to a Portal.&quot; These resources are available in the Default Portal Catalog only when Discussions are enabled in the portal (see Section 39.2, &quot;Enabling and Disabling Tools and Services Available to a Portal&quot;).</td>
</tr>
<tr>
<td></td>
<td>- <strong>Recent Documents</strong> to display recently created or modified document in the portal. For more information, see Chapter 34, &quot;Working with Document Task Flows and Document Components.&quot;</td>
</tr>
<tr>
<td></td>
<td>- <strong>RSS</strong> to view feeds from external sources and WebCenter Portal tools and services. For more information, see Chapter 54, &quot;Adding RSS Feeds to a Portal.&quot;</td>
</tr>
<tr>
<td></td>
<td>- <strong>Subscription Viewer</strong> 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 Chapter 50, &quot;Adding Notifications to a Portal.&quot;</td>
</tr>
<tr>
<td></td>
<td>- <strong>Worklist</strong> to view all worklist items that require the current user’s attention. For more information, see Chapter 57, &quot;Adding Worklists to a Portal.&quot;</td>
</tr>
<tr>
<td>Analytics</td>
<td>Includes task flows to help to track and display different metrics, such as response times and usage behavior:</td>
</tr>
<tr>
<td></td>
<td>- <strong>Blog Metrics</strong></td>
</tr>
<tr>
<td></td>
<td>- <strong>Discussion Forum Metrics</strong></td>
</tr>
<tr>
<td></td>
<td>- <strong>Document Metrics</strong></td>
</tr>
<tr>
<td></td>
<td>- <strong>Login Metrics</strong></td>
</tr>
<tr>
<td></td>
<td>- <strong>Page Traffic</strong></td>
</tr>
<tr>
<td></td>
<td>- <strong>Portal Response Time</strong></td>
</tr>
<tr>
<td></td>
<td>- <strong>Portal Traffic (summary)</strong></td>
</tr>
<tr>
<td></td>
<td>- <strong>Portal Traffic (detailed)</strong></td>
</tr>
<tr>
<td></td>
<td>- <strong>Portlet Instance Response Time</strong></td>
</tr>
<tr>
<td></td>
<td>- <strong>Portlet Instance Traffic</strong></td>
</tr>
<tr>
<td></td>
<td>- <strong>Portlet Response Time</strong></td>
</tr>
<tr>
<td></td>
<td>- <strong>Portlet Traffic</strong></td>
</tr>
<tr>
<td></td>
<td>- <strong>Search Metrics</strong></td>
</tr>
<tr>
<td></td>
<td>- <strong>Wiki Metrics</strong></td>
</tr>
<tr>
<td></td>
<td>For more information, see Chapter 42, &quot;Adding Analytics to a Portal.&quot;</td>
</tr>
<tr>
<td>Content Management</td>
<td>Includes task flows to access, add, and manage folders and files, or display content in a predefined template.</td>
</tr>
<tr>
<td></td>
<td>For more information, see Part VI, &quot;Working with Content in a Portal.&quot;</td>
</tr>
</tbody>
</table>
### Table 23–2  (Cont.)  Resources in the Default Home Portal Resource Catalog

<table>
<thead>
<tr>
<th>Folder</th>
<th>Description</th>
</tr>
</thead>
</table>
| Integration    | This category is available in the Default Portal Catalog only when one or more data controls have been created. Includes data controls created as portal assets:  
  ■ **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 Section 27.2, "Working with Data Controls." |
| Navigation     | This category is not available in the Default Portal Catalog or Default Home Portal 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 Section 21.7, "Adding Navigation to a Page Template." |
| Polls          | Includes task flows to create, edit, and take online polls. Polls let you survey your audience, check whether they can recall important information, and gather feedback on the efficacy of presentations:  
  ■ **Polls Manager** to add detailed polls, showing the status of all current polls, and enable users to perform operations on current polls, as well as publish, analyze, close, and delete all polls.  
  ■ **Quick Poll** to add a quick one-question poll.  
  ■ **Take Polls** to publish the most recently published or a selected poll for users to take.  
  ■ **View Poll Results** to show poll results.  
  For more information, see Chapter 52, "Adding Polls to a Portal." |
| Portal Components | Includes portal components that are available to add to portal pages and page templates.  
  For more information and descriptions of all available portal components, see Appendix B, "Portal Components." |
About Resource Catalogs

Table 23–2  (Cont.) Resources in the Default Home Portal Resource Catalog

<table>
<thead>
<tr>
<th>Folder</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Social and Communication</td>
<td>Includes resources to enable social networking and communication among users:</td>
</tr>
<tr>
<td>Blogs</td>
<td><strong>Blogs</strong> folder, which contains blog task flows (<strong>Archives, Banner, Blog Main View, Blog Viewer, Recent Posts</strong>) that you can select to expose blog components on a page, instead of having a dedicated blog page. For more information, see <strong>Chapter 38, &quot;Adding a Blog to a Portal.&quot;</strong></td>
</tr>
<tr>
<td>Lists</td>
<td><strong>Lists</strong> folder, which contains portal lists that have been created. For more information, see <strong>Chapter 47, &quot;Adding Lists of Information to a Portal.&quot;</strong> This folder is available in the Default Portal Catalog only when Lists are enabled in the portal (see <strong>Section 39.2, &quot;Enabling and Disabling Tools and Services Available to a Portal.&quot;</strong>).</td>
</tr>
<tr>
<td>Connections</td>
<td><strong>Connections, Connections - Card, Connections - Detailed View, and Connections - Quick View</strong> to view and manage connections, and create connections lists. For more information, see <strong>Chapter 45, &quot;Adding Connections to a Portal.&quot;</strong></td>
</tr>
<tr>
<td>Events</td>
<td><strong>Events and Events - Mini View</strong> 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 <strong>Chapter 44, &quot;Adding a Calendar and Events to a Portal.&quot;</strong></td>
</tr>
<tr>
<td>Forums</td>
<td><strong>Forums</strong> to view popular, recent, or watched topics and forums. For more information, see <strong>Chapter 46, &quot;Adding Discussion Forums to a Portal.&quot;</strong> Available in the Default Portal Catalog only when Discussions are enabled in the portal.</td>
</tr>
<tr>
<td>Mail</td>
<td><strong>Mail</strong> to work with personal mail. For more information, see <strong>Chapter 48, &quot;Adding Mail to a Portal.&quot;</strong> This resource is not available in the Default Portal Catalog.</td>
</tr>
<tr>
<td>Members</td>
<td><strong>Members</strong> to list all members in the current portal. For more information, see <strong>Chapter 31, &quot;Working with the Portal Members Task Flow.&quot;</strong> This resource is not available in the Default Home Portal Catalog.</td>
</tr>
<tr>
<td>Message Board</td>
<td><strong>Message Board and Message Board - Quick View</strong> to view and manage messages. For more information, see <strong>Chapter 49, &quot;Adding Messages and Feedback to a Portal.&quot;</strong></td>
</tr>
<tr>
<td>Organization View</td>
<td><strong>Organization View</strong> 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 <strong>Chapter 53, &quot;Adding Profiles to a Portal.&quot;</strong></td>
</tr>
<tr>
<td>Profile</td>
<td><strong>Profile, Profile - Gallery, and Profile - Snapshot</strong> to display a user’s profile details, upload a photo, and (if enabled) edit Profile details. For more information, see <strong>Chapter 53, &quot;Adding Profiles to a Portal.&quot;</strong></td>
</tr>
<tr>
<td>Publisher</td>
<td><strong>Publisher</strong> to publish messages, documents, and URLs to the Activity Stream. For more information, see <strong>Section 41.10, &quot;About Publisher.&quot;</strong></td>
</tr>
<tr>
<td>Recommended Connections</td>
<td><strong>Recommended Connections</strong> to add recommendations for people, items, and portals that may be of interest to you. For more information, see <strong>Chapter 40, &quot;Adding Activity Graphs and Recommendations to a Portal.&quot;</strong></td>
</tr>
<tr>
<td>Similar Items</td>
<td><strong>Similar Items</strong> to add suggestions of other items, based on the item currently selected on the page. For more information, see <strong>Section 40.1.3, &quot;Working with the Similar Items Task Flow.&quot;</strong></td>
</tr>
<tr>
<td>Similar Portals</td>
<td><strong>Similar Portals</strong> to show all portals that are similar to the current portal. This resource is not available in the Default Home Portal Catalog. For more information, see <strong>Section 40.1.2, &quot;Working with the Similar Portals Task Flow.&quot;</strong></td>
</tr>
<tr>
<td>Top Items</td>
<td><strong>Top Items</strong> to enable users to work with active items (documents, wikis, and blogs) in the current portal. For more information, see <strong>Section 40.1.4, &quot;Working with the Top Items Task Flow.&quot;</strong></td>
</tr>
<tr>
<td>Watched Forums</td>
<td><strong>Watched Forums and Watched Topics</strong> to add discussion forums and topics being monitored by the current user. For more information, see <strong>Chapter 46, &quot;Adding Discussion Forums to a Portal.&quot;</strong> Available in the Default Portal Catalog only when Discussions are enabled in the portal.</td>
</tr>
</tbody>
</table>
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 resource catalogs in

## Tagging and Searching

Includes task flows to enable effective searching of portal pages:

- **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 Section 55.3.1, “Working with the Oracle SES 11.1.2.x Search Task Flows.”
- **Similarly Tagged Items** to display other pages or documents that have at least one tag in common with the current page. For more information, see Chapter 56, "Adding Tagging to a Portal.”
- **Tag Cloud** to display the tags that have been created by all users. For more information, see Chapter 56, "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 Chapter 56, "Adding Tagging to a Portal.”
- **Tags** to display tags created by the current user. For more information, see Chapter 56, "Adding Tagging to a Portal.”

## UI Components

Includes the following resources:

- **Pagelet Producers** folder, which contains pagelets deployed in the pagelet producer. Select a pagelet to display it on the current page. For more information, see Chapter 26, "Working with Pagelets.”
- **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 Section 27.3, “Working with Task Flows.”
- **Omniportlet** to publish data from a variety of data sources (including SQL, XML, web services, spreadsheets, and web pages) to several different layouts, such as customizable charts and tables. For more information, see Chapter 17, "Working with OmniPortlet.”

## 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**
- **Image**
- **Links**
- **Movable Box**
- **Text**
- **Web Page**

For more information about these components, see Chapter 15, "Working with Web Development Components on a Page.”

---

**Table 23–2 (Cont.) Resources in the Default Home Portal Resource Catalog**

<table>
<thead>
<tr>
<th>Folder</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tagging and Searching</td>
<td>Includes task flows to enable effective searching of portal pages:</td>
</tr>
<tr>
<td></td>
<td>- <strong>Saved Searches</strong> folder, which contains saved searches that have been created. Select a saved search to display the results of the search on the current page.</td>
</tr>
<tr>
<td></td>
<td>- <strong>All Saved Searches</strong> to display a list of saved searches. For more information, see Section 55.3.1, “Working with the Oracle SES 11.1.2.x Search Task Flows.”</td>
</tr>
<tr>
<td></td>
<td>- <strong>Similarly Tagged Items</strong> to display other pages or documents that have at least one tag in common with the current page. For more information, see Chapter 56, &quot;Adding Tagging to a Portal.”</td>
</tr>
<tr>
<td></td>
<td>- <strong>Tag Cloud</strong> to display the tags that have been created by all users. For more information, see Chapter 56, &quot;Adding Tagging to a Portal.”</td>
</tr>
<tr>
<td></td>
<td>- <strong>Tag Cloud Related Resources</strong> to display resources for a tag selected in the Tag Cloud task flow. For more information, see Chapter 56, &quot;Adding Tagging to a Portal.”</td>
</tr>
<tr>
<td></td>
<td>- <strong>Tags</strong> to display tags created by the current user. For more information, see Chapter 56, &quot;Adding Tagging to a Portal.”</td>
</tr>
<tr>
<td>UI Components</td>
<td>Includes the following resources:</td>
</tr>
<tr>
<td></td>
<td>- <strong>Pagelet Producers</strong> folder, which contains pagelets deployed in the pagelet producer. Select a pagelet to display it on the current page. For more information, see Chapter 26, &quot;Working with Pagelets.”</td>
</tr>
<tr>
<td></td>
<td>- <strong>Portlets</strong> 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.</td>
</tr>
<tr>
<td></td>
<td>- <strong>Task Flows</strong> 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 Section 27.3, “Working with Task Flows.”</td>
</tr>
<tr>
<td></td>
<td>- <strong>Omniportlet</strong> to publish data from a variety of data sources (including SQL, XML, web services, spreadsheets, and web pages) to several different layouts, such as customizable charts and tables. For more information, see Chapter 17, &quot;Working with OmniPortlet.”</td>
</tr>
<tr>
<td>Web Development</td>
<td>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:</td>
</tr>
<tr>
<td></td>
<td>- <strong>Box</strong></td>
</tr>
<tr>
<td></td>
<td>- <strong>Change Language</strong></td>
</tr>
<tr>
<td></td>
<td>- <strong>HTML Markup</strong></td>
</tr>
<tr>
<td></td>
<td>- <strong>Hyperlink</strong></td>
</tr>
<tr>
<td></td>
<td>- <strong>Image</strong></td>
</tr>
<tr>
<td></td>
<td>- <strong>Links</strong></td>
</tr>
<tr>
<td></td>
<td>- <strong>Movable Box</strong></td>
</tr>
<tr>
<td></td>
<td>- <strong>Text</strong></td>
</tr>
<tr>
<td></td>
<td>- <strong>Web Page</strong></td>
</tr>
</tbody>
</table>

For more information about these components, see Chapter 15, "Working with Web Development Components on a Page.”
the application. In addition to including the out-of-the-box resources, the Resource Registry is also updated dynamically to include new resources, such as task flows, data controls, portlets, and navigation models, as and when they are created 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.

The Resource Registry is displayed when you click the Add From Library option (Figure 23–2) in the Edit dialog for a resource catalog.

**Figure 23–2  Add From Library Option to Access the Resource Registry**

[Diagram of Add From Library Option]

**Figure 23–3  Add Resource Catalog Item Dialog (Resource Registry)**

[Diagram of Add Resource Catalog Item dialog]

Table 23–3 describes the folders in the Resource Registry.

**Table 23–3  Folders in the Resource Registry**

<table>
<thead>
<tr>
<th>Resource Folder</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Analytics</td>
<td>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 Chapter 42, “Adding Analytics to a Portal.”</td>
</tr>
<tr>
<td>Components</td>
<td>Lists a selection of components that you can use to design pages, templates, and task flows. For more information, see Chapter 15, “Working with Web Development Components on a Page.”</td>
</tr>
</tbody>
</table>
About the Resource Registry

Working with Resource Catalogs

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 WebCenter Portal tools and services data controls that are available out-of-the-box. In addition, it also displays data controls that an application developer may have created in JDeveloper and deployed to 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 the "Developing Task Flows, Data Controls, and Managed Beans for WebCenter Portal" section in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

- **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 Section 27.2, "Working with Data Controls."

  This folder is empty if there are no runtime data controls in your WebCenter Portal instance.

Documents
Lists all documents that you have access to. For more information, see Part VI, "Working with Content in a Portal."

Lists
Displays all available lists. For more information, see Chapter 47, "Adding Lists of Information to a Portal."

Navigations
Lists all available navigation models. These resources are available out-of-the-box in the Default Page Template Catalog. For more information, see Chapter 22, "Working with Navigation Models."

Pagelet Producers
Lists all registered pagelet producers. For more information, see Chapter 26, "Working with Pagelets."

Portal Components
Lists components, such as menus, links, copyright message, and so on, that are typically used in page templates. These resources are available out-of-the-box in the Default Page Template Catalog, in a folder named Template Development.

For more information, see Appendix B, "Portal Components."

---

**Table 23–3 (Cont.) Folders in the Resource Registry**

<table>
<thead>
<tr>
<th>Resource Folder</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Connections</td>
<td>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.</td>
</tr>
<tr>
<td>Data Controls</td>
<td>Lists all data controls available in WebCenter Portal. This includes data controls created at runtime and data controls deployed from JDeveloper.</td>
</tr>
<tr>
<td>Documents</td>
<td>Lists all documents that you have access to. For more information, see Part VI, &quot;Working with Content in a Portal.&quot;</td>
</tr>
<tr>
<td>Lists</td>
<td>Displays all available lists. For more information, see Chapter 47, &quot;Adding Lists of Information to a Portal.&quot;</td>
</tr>
<tr>
<td>Navigations</td>
<td>Lists all available navigation models. These resources are available out-of-the-box in the Default Page Template Catalog. For more information, see Chapter 22, &quot;Working with Navigation Models.&quot;</td>
</tr>
<tr>
<td>Pagelet Producers</td>
<td>Lists all registered pagelet producers. For more information, see Chapter 26, &quot;Working with Pagelets.&quot;</td>
</tr>
<tr>
<td>Portal Components</td>
<td>Lists components, such as menus, links, copyright message, and so on, that are typically used in page templates. These resources are available out-of-the-box in the Default Page Template Catalog, in a folder named Template Development. For more information, see Appendix B, &quot;Portal Components.&quot;</td>
</tr>
</tbody>
</table>
Setting the Default Resource Catalogs

When a user creates a new page, business role page, or page template, the default resource catalogs determine what can be added to it.

This section includes the following topics:

- Section 23.3.1, "Setting the Default Resource Catalogs for a Portal"
- Section 23.3.2, "Setting the Default Resource Catalog for All Portals"

### 23.3.1 Setting the Default Resource Catalogs for a Portal

**Permissions:** To perform this task, you need the portal-level permission Manage Security and Configuration or Manage Configuration. A portal moderator has this permission by default.

For more information about permissions, see Section 29.1, "About Roles and Permissions for a Portal."

<table>
<thead>
<tr>
<th>Resource Folder</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Portlet Producers</td>
<td>Lists all registered portlet producers.</td>
</tr>
<tr>
<td>Resource Catalogs</td>
<td>Lists all available resource catalogs. You can embed multiple resource catalogs inside a catalog.</td>
</tr>
<tr>
<td>Saved Searches</td>
<td>Displays all saved searches. For more information, see Chapter 55, &quot;Adding Search to a Portal.&quot;</td>
</tr>
<tr>
<td>Task Flows</td>
<td>Lists all task flows available in WebCenter Portal. This includes task flows created at runtime and data controls deployed from JDeveloper.</td>
</tr>
</tbody>
</table>

- **Design Time:** At a minimum, this folder displays the WebCenter Portal tools and services task flows that are available out-of-the-box. In addition, it also displays task flows that an application developer may have created in JDeveloper and deployed to 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 the "Developing Task Flows, Data Controls, and Managed Beans for WebCenter Portal" section in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.
  
  - **Runtime:** For more information, see Section 27.3, "Working with Task Flows."
    
    This folder is empty if there are no runtime task flows in your WebCenter Portal instance.

### 23.3.2 Setting the Default Resource Catalog for All Portals
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 or page templates in the portal. For more information, see Section 7.3.5, "Changing the Resource Catalogs for Pages and the Page Template for a Portal."

### 23.3.2 Setting the Default Resource Catalog for All Portals

Permissions: To perform this task, you need the application-level permission Portal Server: Manage All or Manage Configuration. A system administrator (Administrator role) has this permission by default.

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 the "Choosing Default Resource Catalogs" section in Administering Oracle WebCenter Portal.

### 23.4 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 by extending 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 Section 59.2, "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 Section 20.2, "Accessing Portal Assets."

2. In the left panel, under Structure, click Resource Catalogs.

3. In the toolbar, click Create (Figure 23–4).
4. In the Create New Resource Catalog dialog (Figure 23–5), in the Name field, enter a name for the resource catalog.

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

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

The description is displayed below the name on 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 Section 20.5.4, "Copying an Asset."

7. Click Create.

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. For information about publishing a resource catalog, see Section 20.5.3, "Showing and Hiding Assets."

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. For more information, see
Section 23.5, "Editing a Resource Catalog."

8. To use the new resource catalog to add resources to the pages or page templates in your portal, see Section 23.3, "Setting the Default Resource Catalogs."

23.5 Editing a Resource Catalog

You cannot edit the built-in resource catalog, but you can create a custom resource catalog (see Section 23.4, "Creating a 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:

- Section 23.5.1, "Adding a Resource to a Resource Catalog"
- Section 23.5.2, "Creating a Custom Component"
- Section 23.5.3, "Creating a Folder"
- Section 23.5.4, "Setting Properties on a Resource"
- Section 23.5.5, "Rearranging Resources"
- Section 23.5.6, "Copying a Resource"
- Section 23.5.7, "Deleting a Resource"
- Section 23.5.8, "Previewing a Resource Catalog"

23.5.1 Adding a Resource to a Resource Catalog

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

To add a resource 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 Section 59.2, "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 Section 20.2, "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 Add From Library (Figure 23–2).

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

5. In the Add Resource Catalog Item dialog (Figure 23–3), in the left panel, select a type of resource.

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. For more information, see Section 23.5.4, "Setting Properties on a Resource."

8. Click Add.

Notes: Avoid adding a data control more than once in a resource catalog. The data control is added to the catalog as many times, but when you use the catalog to populate a page or task flow, you will not be able to add accessors, methods, or attributes from such data control instances.

- The Design Time 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. When you are done, click Save and Close.

10. To use the edited resource catalog to add resources to the pages or page templates in your portal, see Section 23.3, "Setting the Default Resource Catalogs."

23.5.2 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 Faces components, custom JSPX, or raw HTML, you can create a custom component and specify the XML code for the component. Using a custom component is the only way to make such components available to a page in Composer.

You may want to create a custom component 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 Section 59.2, "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 Section 20.2, "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 23–6  The Edit Resource Catalog Item - Component Dialog](image)

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 Moderator role, use the following EL expression:

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

   If you need EL assistance, an application developer can provide an EL expression; see the "Expression Language Expressions" appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

8. In the XML text area, enter the XML code for the component.

   The following are a few examples of custom components:

   - Output Text component:
     ```
                    value="Weather Forecast for the Day' id='#'/>
     ```

   - Custom navigation:
     ```
                 var="level_1_menu"
     items="#{SiteStructureContext.defaultSiteStructure.listModel['startNode=/',
     includeStartNode=false']}">
     <af:outputText id="#"/> 
     ```
An alternative to this 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. For more information, see Section 23.5.4, "Setting Properties on a 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. When you are done, click Save and Close.

### 23.5.3 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 Section 59.2, "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 Section 20.2, "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 **Moderator** role, use the following EL expression:

   $$\{\text{WCSecurityContext.userInScopedRole["Moderator"]}\}$$

   If you need EL assistance, an application developer can provide an EL expression; see the "Expression Language Expressions" appendix in *Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper*.

8. On the **Options** tab, set the display options for the folder. For more information, see Section 23.5.4, "Setting Properties on a Resource."

9. On the **Parameters** tab, enter values for any parameters supported by the folder. You can also add custom parameters.

10. Click **OK**.

11. When you are done, 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.

23.5.4 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 Section 59.2, "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 Section 20.2, "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**.

6. On the **Target** tab of the Edit Resource Catalog Item dialog, 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 Moderator role, use the following EL expression:

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

If you need EL assistance, an application developer can provide an EL expression; see the "Expression Language Expressions" appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

9. The remaining fields on this tab are specific to the resource type. See Table 23–4 for details.

Table 23–4 Fields for Specific Resource Catalog Resources

<table>
<thead>
<tr>
<th>Field</th>
<th>Applies to</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Path</td>
<td>Links</td>
<td>Enter the URL to access the resource. The URL format is different depending on what you are linking to:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Task Flow: taskflow://Path_to_Task_Flow/Task_Flow_Definition_File_Name#Task_Flow_ID</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Portlet: portlet://Producer_ID/Portlet_ID</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Content: content://Content_Connection_ID/Document_ID</td>
</tr>
<tr>
<td></td>
<td></td>
<td>If you do not know the location, click the Select icon to browse for available resources.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>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.</td>
</tr>
<tr>
<td>Repository</td>
<td>Resources that require a repository connection</td>
<td>The name of the connection used to lookup the resource.</td>
</tr>
<tr>
<td>Include Catalog</td>
<td>Nested Resource Catalogs</td>
<td>Select the resource catalog to nest within the current catalog.</td>
</tr>
<tr>
<td>Hide Top-Level Folder</td>
<td>Custom folders that are populated dynamically at runtime.</td>
<td>Select to include contents from the selected folder directly under the parent folder; for example, if you select this option for the Data Controls folder, then any data controls created at runtime are displayed directly under Integration. The Data Controls folder is not displayed. You can preview the catalog to see this change.</td>
</tr>
</tbody>
</table>
10. Click the **Options** tab. (**Figure 23–7**)

**Figure 23–7  The Options Tab of the Edit Resource Catalog Item Dialog**

11. Set the various display options, as described in **Table 23–5**.

**Table 23–5  Resource Catalog Item Display Options**

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>attr.ATTRIBUTE_NAME</strong></td>
<td>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, <strong>attr.text</strong> defines the default title for the task flow or portlet and <strong>attr.contentStyle</strong> 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.</td>
</tr>
</tbody>
</table>
In the New Attribute Name field, 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.

In the New Attribute Value field, 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.

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.

Click OK.

When you are done, click Save and Close.

### 23.5.5 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.

### 23.5.6 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 Section 23.5.4, "Setting Properties on a Resource."
23.5.7 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.

23.5.8 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.

23.6 Managing a Resource Catalog

The following options are available on the **Assets** or **Shared Assets** page to enable you to manage resource catalogs:

- **Create**—For more information, see Section 23.4, "Creating a Resource Catalog."
- **Delete**—You can delete a resource catalog when it is no longer required.
  For more information, see Section 20.5.9, "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 Section 20.5.8, "Uploading an Asset."
- **Download**—You can download a resource catalog into an archive file for further development in JDeveloper.
  For more information, see Section 20.5.7, "Downloading an Asset."
- **Actions**
  - **Copy**—You can create a copy of a resource catalog.
    For more information, see Section 20.5.4, "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 Section 20.5.6, "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 Section 20.5.1, "Viewing Information About an Asset."
  - **Edit Source**—You can directly edit the source code of a resource catalog.
    For more information, see Section 20.4.2, "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 Section 20.5.5, "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 Section 20.5.3, "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 Section 23.5.4, "Setting Properties on a Resource."

■ **Edit**—For more information, see Section 23.5, "Editing a Resource Catalog."
This chapter describes how to create, modify, and manage a skin in WebCenter Portal.

**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. For existing skins in WebCenter Portal, a developer can upload them to JDeveloper to further refine and develop them. 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 on through Portal Builder.

For more information, see Section 20.8, "Working with Portal Assets in JDeveloper" and the "Developing Skins" chapter in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

This chapter includes the following topics:

- Section 24.1, "About Skins"
- Section 24.2, "Setting the Default Skin"
- Section 24.3, "Creating a Skin"
- Section 24.4, "Editing a Skin"
- Section 24.5, "Managing a Skin"

**Permissions:** To perform the tasks in this chapter on shared skins, you need the application-level permission Create, Edit, and Delete Skins. Users with the Application Specialist role have this permission by default. For more information about application-level permissions, see the "About Application Roles and Permissions" section in Administering Oracle WebCenter Portal.

To perform the tasks in this chapter on portal-level skins, you need the portal-level permission Create, Edit, and Delete Assets (standard permissions) or Create, Edit, and Delete Skins (advanced permissions). For more information about portal-level permissions, see Section 29.1, "About Roles and Permissions for a Portal."
24.1 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.

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: Chapter 21, "Working with Page Templates"

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.

See Also: Section 21.5, "Setting the Preferred Skin for a Page Template"

Built-in Skins

WebCenter Portal provides the following built-in skins out of the box to get you started.

- Skyros v2
  Provides the preferred skin for the newest 11.1.1.8.3 page templates (see Table 21–1, "Built-in Page Templates"). Do not attempt to use this skin with older page templates. Likewise, do not attempt to use the 11.1.1.8.3 page templates with the older skins listed below.

- Skyros
- WebCenter Portal
- Fusion FX
- Spaces FX

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 Section 21.1.1, "About Built-in Page Templates."

See Also: For more information about how to use skins and other assets to define your portal's look and feel, see Chapter 60, "Creating a Look and Feel for Portals."
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: Section 24.3, "Creating a Skin"

## 24.2 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 Section 21.5, "Setting the Preferred Skin for a Page Template."

This section includes the following subsections:
- Section 24.2.1, "Setting the Default Skin for a Portal"
- Section 24.2.2, "Setting the Default Skin for All Portals"
- Section 24.2.3, "Setting the Default Skin for the Home Portal"

### 24.2.1 Setting the Default Skin for a Portal

Permissions: To perform this task, you need the portal-level permission Manage Security and Configuration or Manage Configuration. A portal moderator has this permission by default.

For more information about permissions, see Section 29.1, "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 Fusion FX 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 use a different skin for the pages in your portal, you can change the default skin setting in portal administration:
- On the Settings page in portal administration (see Section 7.3.1, "Accessing Look and Feel Settings for a Portal"), under Assets, select a new Skin (Figure 24–1).
24.2.2 Setting the Default Skin for All Portals

Permissions: To perform this task, you need the application-level permission Portal Server: Manage All or Manage Configuration. A system administrator (Administrator role) has this permission by default.

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 Fusion FX skin.

For information about how to set the system default skin, see the "Choosing a Default Skin" section in Administering Oracle WebCenter Portal.

24.2.3 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 the "Changing the Look and Feel of Your View" section in Using Oracle WebCenter Portal.

24.3 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.
Creating a 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. For existing skins in WebCenter Portal, a developer can upload them to JDeveloper to further refine and develop them. 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 on through Portal Builder.

For more information, see Section 20.8, "Working with Portal Assets in JDeveloper" and the "Developing Skins" chapter in *Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper*.

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 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 Section 59.2, "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 Section 20.2, "Accessing Portal Assets."

2. In the left panel, under Look and Layout, click **Skins**.

3. In the toolbar, click **Create** (Figure 24–2).

**Figure 24–2  The Create Icon for Creating a Skin**
4. In the Create New Skin dialog (Figure 24–3), in the Name field, enter a name for the skin.

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

   **Figure 24–3  The Create New Skin Dialog**

   ![Create New Skin Dialog](image)

5. In the Description field, enter a description for the skin.

   The description is displayed below the skin name on 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 Section 20.5.4, "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 Section 20.5.3, "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 Section 24.4, "Editing a Skin."

**24.4 Editing a Skin**

You can edit a skin in WebCenter Portal using Composer to meet your requirements.
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:

```
.ADFDefaultFontFamily:alias {
  font-family: Tahoma, Verdana, Helvetica, sans-serif;
}
```

For information about:

- ADF Faces skin selectors in general, see the "Skin Style Selectors" section in *Web User Interface Developer's Guide for Oracle Application Development Framework*. 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 the "Defining Skin Style Properties" and "Changing the Style Properties of a Component" sections in the *Web User Interface Developer’s Guide for Oracle Application Development Framework*.

- Composer component skin-specific selectors, refer to the "Style Selectors for Composer Components" section in *Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper*.

In addition to ADF and Composer 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.
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 shown in Example 24–1.

**Example 24–1  Overriding the Default Font Size in a Skin's CSS File**

```
.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:** For information about how to edit the source code of a skin, see Section 20.4.2, "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 Section 59.2, "Accessing Shared Assets."
   - To edit a portal-level skin, go to the **Assets** page for the portal that owns it. For more information, see Section 20.2, "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.
4. In the Edit dialog (Figure 24–4), from the Item list, select the target area for which you want to update skin properties:
   - **Page Template**—Select to choose the background color, background image, and font for the template used on a page.
   - **Page**—Select to choose the color and image of the page background.
   - **Task Flow/Portlet**—Select to choose the background color and image of task flows and portlets on a page.

![Figure 24–4 Editing Skin Properties](image)

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 using the Documents tool, as described in the “Uploading Files” section in Using Oracle WebCenter Portal. You can then obtain the image’s URL as described in the “Retrieving the URL for a Folder or File” section in Using 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 24–5).
Repeat Vertically—Displays the background image aligned vertically on the left side of the page, with the image repeated across the vertical bar (Figure 24–6).

Select Repeat Horizontally and Repeat Vertically to repeat the selected image across the entire target area (Figure 24–7).
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 (see step 4).

9. When you are done, click Save and Close.

### 24.5 Managing a Skin

The following options are available on the Assets or Shared Assets page to enable you to manage skins:

- **Create**—For more information, see Section 24.3, "Creating a Skin."
- **Delete**—You can delete a skin when it is no longer required.
  
  For more information, see Section 20.5.9, "Deleting an Asset."
- **Upload**—You can upload an archive file that contains a skin that has been developed using JDeveloper.
  
  For more information, see Section 20.5.8, "Uploading an Asset."
- **Download**—You can download a skin into an archive file for further development in JDeveloper.
  
  For more information, see Section 20.5.7, "Downloading an Asset."
- **Actions**
  - **Copy**—You can create a copy of a skin.
    
    For more information, see Section 20.5.4, "Copying an Asset."
Managing a Skin

- **Security Settings**—You can control whether all users or only specific users or groups can access a skin.
  
  For more information, see Section 20.5.6, "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 Section 20.5.1, "Viewing Information About an Asset."

- **Edit Source**—You can directly edit the source code of a skin.
  
  For more information, see Section 20.4.2, "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 Section 20.5.5, "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 Section 20.5.5.5, "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 Section 20.5.3, "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 Section 20.5.5, "Setting Properties on an Asset."

- **Edit**—For more information, see Section 24.4, "Editing a Skin."
This chapter describes how to create, modify, and manage a page style for pages created in WebCenter Portal.

This chapter includes the following topics:

- **Section 25.1, "About Page Styles"**
- **Section 25.2, "Applying a Page Style to a Portal Page"**
- **Section 25.3, "Creating a Page Style"**
- **Section 25.4, "Editing a Page Style"**
- **Section 25.5, "Managing a Page Style"**

---

**Permissions:** To perform the tasks in this chapter on shared page styles, you need the application-level permission *Create, Edit, and Delete Page Styles*. Users with the *Application Specialist* role have this permission by default. For more information about application-level permissions, see the "About Application Roles and Permissions" section in *Administering Oracle WebCenter Portal*.

To perform the tasks in this chapter on portal-level page styles, you need the portal-level permission *Create, Edit, and Delete Assets (standard permissions)* or *Create, Edit, and Delete Page Styles (advanced permissions)*. For more information about portal-level permissions, see **Section 29.1, "About Roles and Permissions for a Portal."**

---

### 25.1 About Page Styles

A page style defines the initial layout of the main *content area* of a newly created page, and may also dictate the type of content that the page supports. For example, the Wiki page style provides an instant wiki; a Blank page style has few restrictions on the types of content users can add to the pages that are based on it.
When users create a page in the page editor, they are provided with selection of page styles to use (Figure 25–2).
Figure 25–2  Selecting a Style for a New Page

![Select a Style](image)

**Note:** If you create the initial pages for a new portal in the Create Portal wizard (see Section 2.3, "Creating Pages When Creating a New Portal"), there is no opportunity to select a page style for the pages. If the portal template selected for the portal includes a page style called Default Page Style, then that is the page style used for all pages created in this way. Otherwise, the out-of-the-box Blank page style is applied to the pages (see Table 25–1, "Out-of-the-Box Page Styles"). 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 the newly created page.

**Built-in Page Styles**

WebCenter Portal offers a range of page styles out of the box. Table 25–1 lists and describes the built-in page styles provided with WebCenter Portal.
### Table 25–1 Out-of-the-Box Page Styles

<table>
<thead>
<tr>
<th>Name</th>
<th>Illustration</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Blank</td>
<td><img src="image" alt="Blank" /></td>
<td>A one-column page with one layout box into which you can add content, including additional layout components.</td>
</tr>
</tbody>
</table>
| Blog      | ![Blog](image) | A page preconfigured to expose blog controls from Content Server. This page style becomes available when the Documents tool is configured and enabled for the portal.  
For more information, see “Understanding the Blog Page Style” in *Using Oracle WebCenter Portal*. |
| Home Page | ![Home Page](image) | A preseeded home page, based on the Right Narrow page style. The Home Page page style comes prepopulated with task flows and other content. |
| Left Narrow | ![Left Narrow](image) | A two-column page with two layout boxes into which you can add content, including additional layout components. Layout boxes are positioned side-by-side, with the narrower layout box on the left. |
| Right Narrow | ![Right Narrow](image) | A two-column page with two layout boxes into which you can add content, including additional layout components. Layout boxes are positioned side-by-side, with the narrower layout box on the right. |
| Three Column | ![Three Column](image) | A three-column page with three layout boxes into which you can add content, including additional layout components. Layout boxes are positioned side-by-side, with narrower layout boxes on the left and right sides. |
| Web Page | ![Web Page](image) | A page that takes a URL value, enabling you to expose external web content in your portal.                                                  |
| Wiki      | ![Wiki](image) | A page preconfigured to expose wiki controls from the Oracle Content Server. This page style becomes available when the Documents tool is configured and enabled for the portal.  
For more information, see “About Wikis” in *Using 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 copy an existing page style and then edit the source code. For more information, see Section 25.3, "Creating a Page Style."

You can also download these custom page styles, bring them into Oracle JDeveloper for additional customization, and upload them back into WebCenter Portal. For more information, see Section 25.4, "Editing a Page Style." The difference between built-in and custom page styles is one of flexibility: many of the actions available to custom page styles are not available to built-in page styles.

25.2 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 25–2).

See Also: For information about creating pages, see Section 12.2, "Creating Pages or Subpages in a Portal."

The page styles offered depend on which styles have been made available to the portal in which you are creating the page. The portal moderator determines which page styles are available to a portal through the following considerations:

- Is the page style shown or hidden?
  For more information, see Section 20.5.3, "Showing and Hiding Assets."

- Has the page style been configured to appear only in selected portals (custom shared page styles only)?
  For more information, see Section 20.5.5, "Setting Properties on an Asset."

- Has the page style been configured to appear only to selected users or roles (custom page styles only)?
  For more information, see Section 20.5.6, "Setting Security for an Asset."

Note: You cannot apply a different page style to a page after the page has been created.

Any changes made to a page style have no effect on pages to which the page style has already been applied.

25.3 Creating a Page Style

Although WebCenter Portal provides several built-in page styles, you may want to create your own. 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: Chapter 16, "Working with Layout Components on a Page"

- 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, the built-in Three Column page style defines the following parameters to enable users to set the width of the columns:

```xml
<parameters>
  <parameter id="leftWidth" value="${'25%'}"/>
  <parameter id="centerWidth" value="${'50%'}"/>
  <parameter id="rightWidth" value="${'25%'}"/>
</parameters>
```

When users create pages using the Three Column page style, the Create Page wizard includes a Settings page where they can set the column widths (Figure 25–3).

**Figure 25–3  The Settings Page of the Create Page Wizard**

- **Simplify styling**

  You can create parameters that are then used in the page to set CSS styles for various elements, for example the background color.
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: Chapter 14, "Working with Resource Catalog Components on a Page"

There is no direct way to create a page style in WebCenter Portal. That is, no Create button is available for starting this process. To create a new page style, you must first copy an existing page style (for more information, see Section 20.5.4, "Copying an Asset").

After you have created the copy, you can edit its source code in the source code editor (for more information, see Section 20.4.2, "Editing the Source Code of an Asset"). However, for more flexibility and a better editing environment, you can download the copied page style and import it into JDeveloper for further development (for more information, see Section 20.8, "Working with Portal Assets in JDeveloper").

For information about working with page styles in JDeveloper, see the "Developing Page Styles" section in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

25.4 Editing a Page Style

After you create a page style (by copying an existing page style), you can edit it to change the appearance and content to match your requirements.
Editing a Page Style

Source editing enables you to work with the underlying code of a custom page style. There are several scenarios for working with page style source code in WebCenter Portal:

- Copy a default page style and make adjustments to the copy’s source code.
- Copy a default 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 JSPX page and page definition file that comprise the page style.

For the steps to access the Edit Source dialog, see Section 20.4.2, "Editing the Source Code of an Asset."

Example 25–1 illustrates page style encoding. It describes a basic page with a two-column layout proportioned at 35 and 65 percent that is designed to flow. This is an example of a page style that was created in JDeveloper, imported into WebCenter Portal, and opened in the Edit Source dialog Page tab for minor revisions.

Example 25–1  Source Code of a Custom Page Style

```xml
<?xml version='1.0' encoding='utf-8'?>
<jsp:root xmlns:jsp="http://java.sun.com/JSP/Page"
xmlns:pe="http://xmlns.oracle.com/adf/pageeditor"
xmlns:cust="http://xmlns.oracle.com/adf/faces/customizable"
xmlns:f="http://java.sun.com/jsf/core"
xmlns:af="http://xmlns.oracle.com/adf/faces/rich"
xmlns:trh="http://myfaces.apache.org/trinidad/html" version="2.1">
<jsp:directive.page deferredSyntaxAllowedAsLiteral="true"/>
<jsp:directive.page contentType="text/html;charset=utf-8"/>
<f:view>
<af:document title="#{pageDocBean.title}" id="docrt">
<af:form usesUpload="true" id="f1">
<af:pageTemplate value="#{bindings.shellTemplateBinding.templateModel}" id="T">
<f:facet name="content">
<pe:pageCustomizable id="pcl1">
<af:panelGroupLayout id="pgl1" layout="scroll"
styleClass="replace_with_scheme_name"
inlineStyle="replace_with_inline_style">
<trh:tableLayout id="tl1" width="100%">
<trh:rowLayout id="rl1">
```

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.
25.5 Managing a Page Style

The following options are available on the Assets or Shared Assets page to enable you to manage page styles:

- **Delete**—You can delete a page style when it is no longer required.
  
  For more information, see Section 20.5.9, "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 Section 20.5.8, "Uploading an Asset."

- **Download**—You can download a page style into an archive file for further development in JDeveloper.
  
  For more information, see Section 20.5.7, "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 Section 20.5.4, "Copying an Asset."
  
  - **Security Settings**—You can control whether all users or only specific users or groups can access a page style.
    
    For more information, see Section 20.5.6, "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 Section 20.5.1, "Viewing Information About an Asset."
  
  - **Edit Source**—You can directly edit the source code of a page style.
    
    For more information, see Section 25.4, "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 Section 20.5.5, "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 Section 20.5.2, "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 Section 20.5.3, "Showing and Hiding Assets."
This chapter provides an introduction to Pagelet Producer and describes how to export and import Pagelet Producer resources.

This chapter includes the following topics:

- Section 26.1, "About Pagelet Producer"
- Section 26.2, "Exporting and Importing Pagelet Producer Resources"

See Also:

- For information about developing and deploying custom pagelets, see "Creating Pagelets with Pagelet Producer" in *Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper*.

- For information on configuring the Pagelet Producer and registering producers, see "Creating Pagelets with Pagelet Producer" in *Administering Oracle WebCenter Portal*.

Permissions: To perform the tasks in this chapter, you need the portal-level permission Manage Security and Configuration or Manage Configuration. A portal moderator has this permission by default.

Any user who accesses administration settings for a portal and does not have Manage permission (for example, a user with Participant role, granted permission to edit a page in the portal) will see only the settings available to their role and permissions.

For more information about permissions, see Section 29.1, "About Roles and Permissions for a Portal."

26.1 About Pagelet Producer

Oracle WebCenter Portal's Pagelet Producer (previously called Oracle WebCenter Ensemble) provides a collection of useful tools that facilitate dynamic pagelet development and deployment. The Pagelet Producer proxy provides users with external access to internal resources including internal applications and secured content. Using Pagelet Producer, you can expose WSRP and Oracle JPDK portlets and OpenSocial gadgets as pagelets for use in any Web page or application.

The following key concepts are useful when working with the Pagelet Producer:
The **Pagelet Producer Console** is a browser-based administration tool used to create and manage the various objects in your Pagelet Producer deployment. From the Console you can register web applications as resources and create pagelets, manage proxy and transformation settings, and more.

You can access the Pagelet Producer Console in either of the following ways:

- In WebCenter Portal administration, on the **Shared Assets** page, select **Pagelets**, then click **Create**. This opens the Pagelet Producer Console. When you’re ready to return to WebCenter Portal click **Cancel**.

- Enter the following URL in your browser:
  
  http://host_name:port_number/pagelets/admin

Any user with the **Admin** role on the host application server can access the Pagelet Producer Console. To grant administrative access to the Pagelet Producer Console to users without administrative access to the application server, use the **EnsembleAdmin** role.

The Pagelet Producer Console can also be launched in accessibility mode at:

http://host:port/pagelets/admin/accessible

For details on using the Console to configure the Pagelet Producer and create objects, see “Creating Pagelets with Pagelet Producer” in *Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper*. For information on using the Console to register producers and migrate pagelet data, see “Managing Oracle WebCenter Portal’s Pagelet Producer ” in *Administering Oracle WebCenter Portal*.

**Resources** are core objects used to register applications within the Pagelet Producer, including stand-alone web applications, Portlet Producers and OpenSocial containers. Creating a resource allows the proxy to map internal applications to external URLs, manage authentication, and transform applications. Registering a web application as a Pagelet Producer resource lets you do the following:

- Proxy internal web applications to external addresses.
- Manage authentication, both at the proxy level and at the resource level.
- Transform proxied web applications, including URL rewriting.

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

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

For details on pagelet development, see "Creating Pagelets with Pagelet Producer" in *Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper*.

Using the Pagelet Producer, you can expose WSRP and Oracle JSDK portlets and OpenSocial gadgets as pagelets for use in any web page or application. For details, see "Managing Oracle WebCenter Portal’s Pagelet Producer ” in *Administering Oracle WebCenter Portal*. 
26.2 Exporting and Importing Pagelet Producer Resources

Pagelet Producer resources can be exported and imported from the Pagelet Producer Console as described in "Exporting and Importing Pagelet Producer Resources" in Administering Oracle WebCenter Portal. Note that you cannot export or import pagelets directly from the Shared Assets page in WebCenter Portal.
This chapter describes how to use Data Presenter to create compelling visualizations of data from various data sources, including relational databases and web services.

This chapter includes the following topics:

- Section 27.1, "About Data Presenter"
- Section 27.2, "Working with Data Controls"
- Section 27.3, "Working with Task Flows"
- Section 27.4, "Working with Task Flow Styles"
- Section 27.5, "Data Presenter Examples"

### Permissions:

To perform the tasks in this chapter on shared Data Presenter assets, you need the application-level permission Create, Edit, and Delete for each of the different Data Presenter assets: Data Controls, Task Flows, and Task Flow Styles. Users with the Application Specialist role automatically have these permissions. For more information about application-level permissions, see the "About Application Roles and Permissions" section in Administering Oracle WebCenter Portal.

To perform the tasks in this chapter on portal-level Data Presenter assets, you need the portal-level permission Create, Edit, and Delete Assets (standard permissions) or Create, Edit, and Delete (advanced permissions) for each of the different Data Presenter assets. For more information about portal-level permissions, see Section 29.1, "About Roles and Permissions for a Portal."

### 27.1 About Data Presenter

Data Presenter enables you to retrieve data from a data source, such as a relational database or web service, and display that data as a table, form, or graph in your portal.

You can create a collection of interacting components on a page or task flow, each working against a different data source if desired.

You can use the following Data Presenter assets to visualize data in your portal:

- **Data Controls** retrieve data from a relational database or web service data source. For more information, see Section 27.2, "Working with Data Controls."
- **Task Flows** consume data controls to visualize data in a portal. Portal users can then add these task flows to the pages in the portal. For more information, see
Task Flow Styles determine the layout of task flows created at runtime, including those used for data visualization. For more information, see Section 27.4, "Working with Task Flow Styles."

When you add data to a task flow, you can visualize it in several ways:

- **Table**—Displays the data in a tabular layout.
- **Form**—Displays the data in a form.
- **Graph**—Displays the data graphically, as a bar, pie, line, or area chart. This is useful for the purpose of analysis, when you want to generate a report.

You can enable users to control what data is displayed in the table, form, or chart by exposing the data control’s parameters along with the data visualization. Users can then specify their own values for those parameters and display the data that matches those values.

You can also wire data control parameters to task flow parameters.

27.2 Working with Data Controls

Use data controls to retrieve the data that you want to display in your portal. Data controls can be based on relational database or web service data sources.

This section includes the following topics:

- Section 27.2.1, "Supported Data Controls"
- Section 27.2.2, "Creating Data Controls"
- Section 27.2.3, "Editing Data Controls"
- Section 27.2.4, "Managing Data Controls"

27.2.1 Supported Data Controls

A data control is essentially a bridge that makes data from a source available to the user interface in a portal. You can use the objects in the data control, such as accessors, methods, and attributes, to create data bound user interface components.

The advantage of creating data controls in WebCenter Portal is that you can get data from different data sources and create visualizations without having to redeploy and restart your portal. Furthermore, you can modify data visualizations at any time and control what is retrieved from the data source and rendered on the page.

The type of data control to use depends on where the data is stored and how it is exposed. For example, use a web service data control to call a web service for data. The process of collecting data is different for each data source.

This section includes the following topics:
Section 27.2.1.1, "SQL Data Controls"

27.2.1.1 SQL Data Controls

SQL data controls retrieve data from relational databases. You retrieve data by specifying a SQL query. To limit the data retrieved to specific criteria, you can specify a WHERE clause, for example:

```sql
SELECT * FROM emp WHERE deptno = 40
```

**Note:** To create a SQL data control, you must have a data source connection from the application server to the database.

You can use one or more bind parameters as part of the SQL query to enable end users to specify what data to retrieve, for example:

```sql
SELECT * FROM emp WHERE deptno = :dept AND job = :job
```

Bind parameters provide the following benefits:

- Enable reuse of a data control. A data control with one or more bind variables can be used many times in different visualizations, each instance displaying different data.
- Enable end users to control the data retrieved by the data control. The data controls that you create are consumed in task flows and eventually viewed by end users on portal pages. When you add a data control to a task flow as a table, form, or chart, you can expose the data control’s parameters in a parameter form above the data visualization. Users can enter values in this parameter form to change the data retrieved by the data control. You can also wire data control parameters to task flow parameters. For more information, see Section 27.3.6, "Controlling the Data Displayed in Visualizations."
- If a database has imposed an IO limit, and the query happens to traverse a large number of records that exceeds the IO limit, then adding such a data control to a task flow may result in an error and failure to render. You can limit the data retrieved from a database to specific criteria by specifying a WHERE clause in your query.

**Note:** Data controls created in WebCenter Portal can be used only to query the database, you cannot update the retrieved data. However, data controls created at design time in JDeveloper that have read-write capabilities allow the retrieved data to be updated. For information about design-time data controls, see the Fusion Developer’s Guide for Oracle Application Development Framework.

For information about how to create a SQL data control, see Section 27.2.2.1, "Creating a SQL Data Control."

27.2.1.2 Web Service Data Controls

Web service data controls retrieve data from a business service that is accessed using standard protocols, such as SOAP and HTTP. To collect data from a web service, you must know the path to the Web Service Description Language (WSDL) file. The WSDL
file describes the web service and specifies the methods that can be called, including the expected parameters. It also describes the returned data.

Based on the permissions you have on a web service data source, you can only 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.

For information about how to create a web service data control, see Section 27.2.2.2, "Creating a Web Service Data Control."

### 27.2.2 Creating Data Controls

Before you can display data in a portal, you must first create a data control to retrieve the data from the underlying data source.

This section includes the following topics:

- Section 27.2.2.1, "Creating a SQL Data Control"
- Section 27.2.2.2, "Creating a Web Service Data Control"

#### 27.2.2.1 Creating a SQL Data Control

SQL data controls enable you to retrieve data from a relational database using a SQL query.

**Before You Begin**

Before you can use a database as the source for a data control, your system administrator must create a connection to the database. For more information, see the "Creating a JDBC Data Source" section in Configuring and Managing JDBC Data Sources for Oracle WebLogic Server.

The default SQL style for all database connections is Oracle. If the data source is an IBM DB2 or Microsoft SQL Server database, then the system administrator must perform the following tasks:

- Manually override the SQL style with one that supports the DB2 or SQL Server database. To do this, specify a Java system property, jbo.SQLBuilder, with the value of DB2 or SQLServer. When Oracle WebLogic Server is started with this configuration, it supports the SQL style specified.

Specify the system property as a Java command line option in any of the following ways:

- Open the DomainHome/bin/setDomainEnv.sh file and add
  -Djbo.SQLBuilder=DB2 or -Djbo.SQLBuilder=SQLServer to the JAVA_OPTIONS line.
– Edit the managed server start script in a text editor and add
-Djbo.SQLBuilder=DB2 or -Djbo.SQLBuilder=SQLServer to the JAVA_OPTIONS line.

For more information, see "Specifying Java Options for a WebLogic Server Instance" in Managing Server Startup and Shutdown for Oracle WebLogic Server.

– 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'

---

**Note:** The SQL style setting applies to the whole application, therefore you cannot use multiple SQL styles in an application.

---

**Tip:** For a list of what is and is not supported on databases other than Oracle, see the "System Requirements and Supported Platforms for Oracle Fusion Middleware 11gR1" document. This document is located on the Oracle Fusion Middleware Supported System Configurations page at http://www.oracle.com/technetwork/middleware/ias/downloads/fusion-certification-100350.html.

To create a SQL 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 Section 59.2, "Accessing Shared Assets."
   - To create a portal-level data control, go to the Assets page for the portal in which you want to create the data control. For more information, see Section 20.2, "Accessing Portal Assets."

2. In the sidebar, 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 SQL and then click Continue.

7. From the Data Source drop-down list, select the database connection to use for this SQL data control.

8. In the Password field, enter the connection password.
   This field ensures that only users who know the password to connect to the data source can create a data control. You must specify the password every time you create or edit a data control.
9. In the **SQL Statement** field, enter the SQL query to use to retrieve the data for your data control, for example:

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

Specify any bind variables as part of the query. Bind variables are useful in controlling the data displayed in the data control.

Consider the following example:

   ```sql
   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 (how you specify this is explained in the next step). You can add as many bind variables as required. You can also use the same variable multiple times in the query.

**Tips:**

- Avoid using SQL reserved words and keywords for bind variables. 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:

   ```sql
   SELECT CONVERT(VARCHAR(20), col1) col1, CONVERT(VARCHAR(20), col2) col2 FROM table1
   ```

10. If you included bind variables in your SQL query, for example `job`, then click **Enter Bind Variables** to specify details for those variables.

**Figure 27–1  Specifying Bind Variables for a SQL Data Control**
For each bind variable:

a. In the **Value** field, enter a default value for the bind variable.
   This value is used to determine the initial data retrieved by the data control.

b. From the **Type** drop-down list, select whether the bind variable is of type **Text** or **Boolean**.
   This provides basic data validation and determines how the bind variable is displayed to users on a page. Bind variables of type **Text** are displayed as a text field, **Boolean** variables are displayed as a check box.

c. In the **Display Name** field, enter a user-friendly name for the bind variable.
   This name is displayed to users when they consume the data control in a task flow.

d. In the **Tooltip** field, enter a brief description of the bind variable.
   This provides users with assistance in determining the purpose of the variable.

11. Click **Test** to test the query you entered.
   
   If you added bind parameters, but did not specify default values for the parameters, then you will see a error message.

   If the query is correct, then a table displays the results of the query. Use the scrollbars to view all the data in the table.

12. 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. For more information, see Section 20.5.3, "Showing and Hiding Assets."

### 27.2.2.2 Creating a Web Service Data Control

Web service data controls retrieve data from business services that are 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 Section 59.2, "Accessing Shared Assets."
   - To create a portal-level data control, go to the **Assets** page for the portal in which you want to create the data control. For more information, see Section 20.2, "Accessing Portal Assets."

2. In the sidebar, 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**.

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.

   For more information about RSS proxy, see "Setting Up a Proxy Server for the RSS Service" in the *Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper*.

   ■ 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.
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 27–1.

**Table 27–1 OWSM Security Information**

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>MTOM</td>
<td>The MOTM (message transmission optimization mechanism) policy you want to use.</td>
</tr>
<tr>
<td>Reliability</td>
<td>The reliability policy you want to use.</td>
</tr>
<tr>
<td>Addressing</td>
<td>The addressing policy you want to use.</td>
</tr>
<tr>
<td>Security</td>
<td>Any additional security policies you want to apply.</td>
</tr>
</tbody>
</table>

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 *Security and Administrator’s Guide for 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 the "Adding Keys and User Credentials to the Credential Store" section in the *Security and Administrator’s Guide for Web Services*.

**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 Section 27.2.1.2, "Web Service Data Controls."

**16.** 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 Section 27.3.6.2, "Editing Data Control Parameter Values."

**17.** 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. For more information, see Section 20.5.3, "Showing and Hiding Assets."

### 27.2.3 Editing Data Controls

After you have created a data control, you can edit various properties.

This section includes the following topics:

- Section 27.2.3.1, "Editing a Data Control"
- Section 27.2.3.2, "Editing SQL Data Control Bind Variables"

#### 27.2.3.1 Editing a Data Control

You can modify a 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.
To edit a 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 Section 59.2, "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 Section 20.2, "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 27–3).

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:
   - Section 27.2.2.1, "Creating a SQL Data Control"
   - Section 27.2.2.2, "Creating a Web Service Data Control"

5. When you are done, click Save and Close.

27.2.3.2 Editing SQL Data Control Bind Variables

You can add or rename bind variables in existing SQL data controls by editing the SQL query used for the data control. Modify the SQL query in the Edit Data Control page. You can also edit the variable details, such as display name and default value.

Note: You should take care when renaming bind variables. If the data control has been consumed in a task flow, renaming any bind variables exposed in parameter forms may cause the data visualization to break.

To edit SQL data control bind variables:

1. Edit the data control, as described in Section 27.2.3.1, "Editing a Data Control."

2. In the Edit Data Controls page, to add or rename bind variables, edit the query in the SQL Statement field.

3. To specify details for the bind variables, click Enter Bind Variables.
4. For each bind variable:
   a. In the **Value** field, enter a default value for the bind variable.
      This value is used to determine the initial data displayed when the data
      control is displayed.
   b. From the **Type** drop-down list, select whether the bind variable is of type **Text**
      or **Boolean**.
      This provides basic data validation and determines how the bind variable is
      displayed to users on a page. Bind variables of type **Text** are displayed as a
      text field, **Boolean** variables are displayed as a check box.
   c. In the **Display Name** field, enter a user-friendly name for the bind variable.
      This name is displayed to users when they consume the data control in a task
      flow.
   d. In the **Tooltip** field, enter a brief description of the bind variable.
      This provides users with assistance in determining the purpose of the variable.

5. When you are done, click **Save and Close**.
   If the data control has been consumed within a task flow, the table, form, or graph
   now displays data specific to the new parameter values you provided.
   When users consume a data control, they can control the display of data in the
   visualization by specifying values for the data control’s parameters. For more
   information, see Section 27.3.6, "Controlling the Data Displayed in Visualizations."

### 27.2.4 Managing Data Controls

The following options are available on the Data Controls page of the **Assets** and
**Shared Assets** pages to enable you to manage data controls:

- **Create**—For more information, see one of the following:
  - Section 27.2.2.1, "Creating a SQL Data Control"
  - Section 27.2.2.2, "Creating a Web Service Data Control"

- **Delete**—You can delete a data control when it is no longer required.
  For more information, see Section 20.5.9, "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 Section 27.3.5.5, "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 Section 20.5.8, "Uploading an Asset."
  You cannot use the **Upload** option to upload a data control that has been exported
  from JDeveloper.
– For SQL data controls, the database referenced by the data control must exist in the target instance, with all the relevant tables and views. Your system administrator must ensure that a connection to the database exists in the target instance. This connection must have the same name as the connection in the source instance. For more information, see the “Creating a JDBC Data Source” section in Configuring and Managing JDBC Data Sources for Oracle WebLogic Server.

– For web service data controls, your system administrator must ensure that a web service connection, complete with credentials, to the web service exists on the target instance.

You can upload a connection used by the data control (for example, a web service connection used by a web service 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 the “importWebCenterPortalConnections” section in the WebLogic Scripting Tool Command Reference. For information on how to run WLST commands, see the “Running Oracle WebLogic Scripting Tool (WLST) Commands” section 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 Section 20.5.7, "Downloading an Asset."

You cannot import a data control that has been downloaded from WebCenter Portal into JDeveloper.

You can also download any connection used by the data control (for example, a web service connection used by a web service 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 the "exportWebCenterPortalConnections” section in the WebLogic Scripting Tool Command Reference. For information on how to run WLST commands, see the "Running Oracle WebLogic Scripting Tool (WLST) Commands" section 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.

For more information, see Section 20.5.4, "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 Section 20.5.6, "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 Section 20.5.5, "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 Section 20.5.1, "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 Section 20.5.3, "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 Section 20.5.5, "Setting Properties on an Asset."

Edit—For more information, see Section 27.2.3, "Editing Data Controls."

27.3 Working with Task Flows

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

You can enable users to control the data displayed by the data control by including a parameter form along with the data visualization. For example, if you have a SQL data control with a bind variable, job, that retrieves data from an employee database, you can add the data control to a task flow as a table and include the job parameter in a parameter form that is displayed above the table. The data control then retrieves data based on the value specified for the job parameter in the parameter form. You can also wire data control parameters to task flow parameters so that the data control retrieves data based on the value specified for the task flow parameter. Users can change the value of the task flow parameter in the page editor to request the corresponding data from the data control. For more information, see Section 27.3.6, "Controlling the Data Displayed in Visualizations."

This section includes the following topics:

- Section 27.3.1, "About the Built-In Task Flows"
- Section 27.3.2, "Supported Visualizations"
- Section 27.3.3, "Creating a Task Flow to Visualize Data"
- Section 27.3.4, "Editing a Task Flow"
- Section 27.3.5, "Consuming Data Controls in a Task Flow"
- Section 27.3.6, "Controlling the Data Displayed in Visualizations"
- Section 27.3.7, "Writing to a Data Source from a Visualization"
- Section 27.3.8, "Managing Task Flows"
- Section 27.3.9, "Consuming a Task Flow in a Page"

27.3.1 About the Built-In Task Flows

Out of the box, WebCenter Portal includes two task flows, which are used to provide navigation in the latest page templates (see Table 21–1, "Built-in Page Templates"). The styling of the navigation in these task flows relies on the CSS in the Skyros v2 skin used in these page templates. If you wish to use these task flows in a page template that uses a different skin, be aware that the navigation may not look as expected due to CSS mismatches in the skin. However, if you copy and paste the navigation sections from the Skyros v2 skin source code into your skin source code, you can achieve expected results.
Table 27–2 describes the task flows available out-of-the box.

### Table 27–2  Built-in Task Flows

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Portal Side Navigation</td>
<td>A task flow used in the Skyros Side Navigation v2 and Skyros Side Navigation (Stretch) v2 page templates to implement a side navigation layout.</td>
</tr>
<tr>
<td>Portal Top Navigation</td>
<td>A task flow used in the Skyros Top Navigation v2 and Skyros Top Navigation (Stretch) v2 page templates to implement a top navigation layout.</td>
</tr>
</tbody>
</table>

#### 27.3.2 Supported Visualizations

The data retrieved using SQL and web service data controls 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 Section 27.3.5.2, "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 Section 27.3.5.3, "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 Section 27.3.5.4, "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.

  For more information, see Section 27.3.7, "Writing to a Data Source from a Visualization."

- **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 Section 27.3.6.3, "Binding a Data
27.3.3 Creating a Task Flow to Visualize Data

To visualize data in a portal, you must create a task flow in which to consume the data control that retrieves the data.

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 Section 59.2, "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 Section 20.2, "Accessing Portal Assets."

2. In the sidebar, under UI Components, click Task Flows.

3. In the toolbar, click Create.

4. In the Create New Task Flow dialog, in the Name field, enter a name for the task flow.

5. (Optional) In the Description field, enter a meaningful description for the task flow.

   The name and description are displayed in the resource catalog.

6. From the Mashup Style options, select the task flow style to use for the task flow.

   For more information, see Section 27.4, "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 Section 20.5.3, "Showing and Hiding Assets."

You can now edit the new task flow using the page editor and populate it with the different resources, including data controls, that are available from the resource catalog. For more information, see Section 27.3.4, "Editing a Task Flow" and Section 27.3.5, "Consuming Data Controls in a Task Flow."

27.3.4 Editing a Task Flow

When you first create a task flow, it contains only the content specified by the 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 of editing a task flow in WebCenter Portal is to use the page editor.
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 Section 59.2, "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 Section 20.2, "Accessing Portal Assets."

2. In the sidebar, under UI Components, click Task Flows.

3. Click the Edit quick link for the task flow that you want to edit (Figure 27–4).

4. In 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 Section 27.3.5, "Consuming Data Controls in a Task Flow."
   - For information about adding other content to the task flow, see Chapter 14, "Working with Resource Catalog Components on a Page" and Chapter 15, "Working with Web Development Components on a Page."

5. Click the Save to save your changes.

27.3.5 Consuming Data Controls in a Task Flow

When published, data controls are automatically available in the resource catalog and can therefore be added to task flows. You can consume data controls in task flows and render them in different ways, such as tables, graphs, and forms, to create useful data visualizations. 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.

**Tip:** 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 without having to download it, edit it in JDeveloper, and upload it back into WebCenter Portal.

For more information, see Section 20.4.2, "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 Section 59.2, "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 Section 20.2, "Accessing Portal Assets."

2. In the sidebar, under UI Components, click Task Flows.

3. Click the Edit quick link for the task flow that you want to edit (Figure 27–4).

4. In 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 Section 27.3.5, "Consuming Data Controls in a Task Flow."
   - For information about adding other content to the task flow, see Chapter 14, "Working with Resource Catalog Components on a Page" and Chapter 15, "Working with Web Development Components on a Page."

5. Click the Save to save your changes.

27.3.5 Consuming Data Controls in a Task Flow

When published, data controls are automatically available in the resource catalog and can therefore be added to task flows. You can consume data controls in task flows and render them in different ways, such as tables, graphs, and forms, to create useful data visualizations. 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 subsections:

- Section 27.3.5.1, "Adding a Data Control to a Task Flow"
- Section 27.3.5.2, "Presenting Data as a Table"
- Section 27.3.5.3, "Presenting Data as a Form"
- Section 27.3.5.4, "Presenting Data as a Graph"
- Section 27.3.5.5, "Repairing a Task Flow with Broken References to a Data Control"

### 27.3.5.1 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 visualization it supports, different options are listed in the Add menu. For more information, see Section 27.3.2, "Supported Visualizations."

To add a data control to a task flow:

1. Edit the task flow in the page editor, as described in Section 27.3.4, "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 Portal Catalog, runtime-created data controls are located in the Data Controls folder, which is nested inside the Integration folder.

   **Note:** Assuming you have created a SQL data control, you may find that the resource catalog in the page editor does not include the data control, which means you are not able to add it to a task flow. For more information, see the tips in the step to enter a SQL statement in Section 27.2.2.1, "Creating a SQL Data Control."
3. Click **Open** next to the data control to display its content.
4. 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 Section 27.3.5.2, "Presenting Data as a Table."
   - **Form**—For more information, see Section 27.3.5.3, "Presenting Data as a Form."
   - **Graph**—For more information, see Section 27.3.5.4, "Presenting Data as a Graph."

### 27.3.5.2 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**—Add the data control as an editable table so that users can edit information in the table and commit those changes back to the data source. Currently, there is limited support for editable tables and they should be implemented only by experienced developers.

To present data as a table:

1. Follow the steps in Section 27.3.5.1, "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 visualizations are wired in a master-detail relationship.

     If you need EL assistance, an application developer can provide an EL expression; see the "Expression Language Expressions" appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

     **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.

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-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** and go to **Section 27.3.6.1, "Adding a Parameter Form to a Data Visualization."**

   If the data control does not have associated parameters, or you do not want to include a parameter form, click **Create**.

### 27.3.5.3 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**—Add the data control as an editable form so that users can edit the retrieved values and commit those changes back to the data source. Currently, there is limited support for editable forms and they should be implemented only by experienced developers.

**Note:** Data controls created at runtime do not support editing of data. Currently, only design time BC4J-based SQL data controls support editing of data through tables.

To present data as a form:

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

1. Follow the steps in **Section 27.3.5.1, "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.

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 and go to Section 27.3.6.1, "Adding a Parameter Form to a Data Visualization."
   
   If the data control does not have associated parameters, or you do not want to include a parameter form, click Create.

**27.3.5.4 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. Graphs are for displaying data only; the data cannot be edited. You can display data as a bar, pie, line, or an area chart.

To present data as a graph:

1. Follow the steps in Section 27.3.5.1, "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 sub-type 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** and go to Section 27.3.6.1, "Adding a Parameter Form to a Data Visualization."

   If the data control does not have associated parameters, or you do not want to include a parameter form, click **Create**.

### 27.3.5.5 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 Section 20.4.2, "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 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**.

### 27.3.6 Controlling the Data Displayed in Visualizations

Data control parameters are used to restrict the data retrieved by a data control based on the criteria you specify. For example, if you have a data control that retrieves employee information from a database, you can create a **job bind** parameter to limit the data retrieved to a specified job role only. For more information, see Section 27.2.2, "Creating Data Controls."

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:

- Section 27.3.6.1, "Adding a Parameter Form to a Data Visualization"
- Section 27.3.6.2, "Editing Data Control Parameter Values"
- Section 27.3.6.3, "Binding a Data Control Parameter to a Task Flow Parameter"

### 27.3.6.1 Adding a Parameter Form to a Data Visualization

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 on 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 data visualization:

1. Add the data control to a task flow as a table, form, or graph, as described in Section 27.3.5, "Consuming Data Controls in a Task Flow."
2. On the Visualization Parameter page of the Create Table, Create Form, or Create Graph wizard, select the check box next to a parameter if you want users to be able to provide their own values for it.

Any parameters you select in this way are displayed in a parameter form above the table, form, or graph. 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 that specified when the data control was created. You can override the data control values to control the initial display of data in the table, form, or graph.

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.

27.3.6.2 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.

Tip: For SQL data controls, you can also change the parameter values in the underlying data control. For more information, see Section 27.2.3.2, "Editing SQL Data Control Bind Variables."

To edit data control parameter values:
1. Edit the task flow in the page editor, as described in Section 27.3.4, "Editing a Task Flow."
2. Edit the properties of the table, form, or graph.

Tip: The best way to ensure that you are editing the properties of the table, form, or graph, rather than a containing layout component, is to switch to Structure view, right-click the table, form, or graph, and choose Edit from the popup menu.

3. In the Data tab of the Component Properties 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.

27.3.6.3 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.

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, as described in Section 27.3.4, "Editing a Task Flow."
   b. Click the Task Flow Properties icon (Figure 27–5).

   ![Figure 27–5 The Task Flow Properties Icon](image)

   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 Table 27–3. 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 the "Expression Language Expressions" appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

   ![Table 27–3 Storage Values](image)

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>pageFlowScope</td>
<td>The value is available to all instances of the task flow on the page.</td>
</tr>
<tr>
<td>viewScope</td>
<td>The value is available only to the selected instance, for the current user.</td>
</tr>
<tr>
<td>applicationScope</td>
<td>The value is available to all instances of the task flow within the application or across applications.</td>
</tr>
<tr>
<td>sessionScope</td>
<td>The value is available only to the current user, for the current session.</td>
</tr>
</tbody>
</table>

d. Make a note of the value in the Storage field.

   e. Click OK.

2. Click the Edit icon for the table, form, or graph that displays data from the data control (Figure 27–6).

   Tip: Make sure you click the Edit icon for the table, form, or graph rather than the one for the area of the task flow that contains it.
3. In the Data tab of the Component Properties 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:** For a SQL data control, if there is no initial value defined for the task flow parameter, the data control retrieves data specific to the initial value of the bind parameter.

If you are using a web service data control for which you have not defined a parameter value, you must set an initial value for the task flow parameter. If not, the task flow displays an empty visualization (table, form, or graph). Therefore, in the Data tab for a web service data control, you must pass an initial value for the task flow parameter as shown in the following example:

```
```

**27.3.7 Writing to a Data Source from a Visualization**

**Note:** Due to the more complex nature of this task, it is recommended that it should be performed by experienced developers only.
You can add a data control as an editable table or form to provide the ability to update the records in the table or form and write those updated values back to the data source. However, you can update records only if:

- The data control is created for a web service data source that supports updating, and the insert or update operation is exposed through the published web service endpoint.
- For editable tables only—The data control is a BC4J-based SQL data control created at design time. SQL data controls created at runtime do not support editing of data in a table.

You can add the data control’s accessor as a table inside a task flow and add the update method so that changes made to the table can be saved to the data source.

If a web service supports updating, then the web service data control may provide methods to query and update records. Further, to enable multiple records to be updated simultaneously, web service data controls created at runtime provide array parameters. You can wire an array parameter to multiple input fields in the task flow so that the values specified in the fields are passed to the data source in one go.

The section includes the following topics:

- Section 27.3.7.1, "Querying the Data Source"
- Section 27.3.7.2, "Updating Records in the Data Source"

**Before You Begin**

To perform the steps in this section:

- You must have created a web service data control that provides methods to query and update data. For more information, see Section 27.2.2.2, "Creating a Web Service Data Control."
- You must have consumed the data control’s accessor as a table or form inside a task flow. For more information, see Section 27.3.5, "Consuming Data Controls in a Task Flow."

**27.3.7.1 Querying the Data Source**

First you must add a button or link that enables users to query the data source.

To add a query option to a task flow:

1. Edit the task flow in the page editor, as described in Section 27.3.4, "Editing a Task Flow."
2. In the inline resource catalog, navigate to the web service data control that you want to use.
3. Expand the data control and click Add next to the method for querying the data source.
4. From the drop-down menu, select Button or Link.

**27.3.7.2 Updating Records in the Data Source**

You must also add a button or link that enables users to update the data source.

To add an update option to a page displaying records from a database:

1. Edit the task flow in the page editor, as described in Section 27.3.4, "Editing a Task Flow."
2. In the inline resource catalog, navigate to the web service data control that you want to use.

3. Expand the data control, and click Add next to the method for updating the data source.

4. From the drop-down menu, select Button or Link.

   **Tip:** Methods to insert or update records are available only if the web service supports updating and the data control was added as an editable table or form.

   Typically, an insert or update method expects values for exposed parameters, based on which it performs the operation. Therefore, the next step is to provide UI elements to specify values for parameters.

5. Add Input Text components to specify the method parameter values.

   **Tip:** As the resource catalog does not provide ADF Faces components such as Input Text out of the box, edit the page's source files and add the code for such components.

6. Wire the update method's parameters to the Input Text component's value attributes. This involves:
   - Setting an Input Text component's value attribute using the format:
     ```java
     #{pageFlowScope.COLUMN_NAME}
     ```
   - Referencing the same location, `#{pageFlowScope.COLUMN_NAME}`, from the method's parameter. You can set this by selecting the button or link in the page editor's Structure view, editing its properties, and specifying the value on the Data tab.

   When you specify values in the input fields and click the update method's button or link, the values are passed back as web service parameters values.

**27.3.8 Managing Task Flows**

The following options are available on the Task Flows page of the Assets and Shared Assets pages to enable you to manage task flows:

- **See Also:** Section 20.2, "Accessing Portal Assets" and Section 59.2, "Accessing Shared Assets"

- **Create**—For more information, see Section 27.3.3, "Creating a Task Flow to Visualize Data."

- **Delete**—You can delete task flows when they are no longer required.
  For more information, see Section 20.5.9, "Deleting an Asset."

- **Upload**—You can upload an archive file that contains a task flow from another portal.
  For more information, see Section 20.5.8, "Uploading an Asset."

You cannot use the Upload option to upload a task flow that has been exported from JDeveloper.
If the task flow that you are uploading consumes data controls, you must first upload those data controls. For more information, see Section 27.2.4, "Managing 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 Section 20.5.7, "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.
  
  For more information, see Section 20.5.4, "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 Section 20.5.6, "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 Section 20.5.1, "Viewing Information About an Asset."

- **Edit Source**—For more information, see Section 20.4.2, "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 have been created in JDeveloper to the task flow. 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 Section 20.5.5, "Setting Properties on an Asset."

**Preview**—You can preview how the task flow will appear when displayed on a page.

For more information, see Section 20.5.2, "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 Section 20.5.3, "Showing and Hiding Assets."
27.3.9 Consuming a Task Flow in a Page

To add data visualization to a page, you add the task flow that contains the visualization. For information about creating task flows that contain data visualization, see Section 27.3.3, "Creating a Task Flow to Visualize Data."

To consume a task flow in a page:

1. Open the page in which you want to display the data in the page editor. For more information, see Section 12.4.3, "Opening a Page in the Page Editor (Composer)."

2. The method for adding a task flow to a page is that same as for any other component in the resource catalog. For more information, see Section 14.2, "Adding a Component to a Page."

   Tip: The location of task flows in the resource catalog depends on the resource catalog used for editing pages. For example, in the Default Portal 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, you can change the data displayed by the task flow by editing the data control parameter values in the Component Properties dialog for the table, form, or graph. For more information, see Section 27.3.6.2, "Editing Data Control Parameter Values."

   If the underlying data control's parameters are bound to the task flow's parameters, the task flow parameters drive the data that is displayed. You can change the task flow parameter value in the Parameters tab of the Component Properties dialog for the task flow.

4. Click Save to save your changes.

   If the data visualization includes a parameter form, users can enter values to change the data displayed on the page.

27.4 Working with Task Flow Styles

Task flow styles are templates used for creating task flows at runtime. They 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.

This section includes the following topics:

- Section 27.4.1, "About the Built-in Task Flow Styles"
- Section 27.4.2, "Creating a Task Flow Style"
- Section 27.4.3, "Editing a Task Flow Style"
- Section 27.4.4, "Managing Task Flow Styles"
27.4.1 About the Built-in Task Flow Styles

Table 27–4 describes the task flow styles available out of the box.

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Blank</td>
<td>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.</td>
</tr>
<tr>
<td>Stretch</td>
<td>Maximizes the task flow to take up all available space. For an example of a page based on the Stretch style, see the Documents page or the Announcements page in WebCenter Portal. Task flows based on this style cannot be switched.</td>
</tr>
</tbody>
</table>

27.4.2 Creating a Task Flow Style

In WebCenter Portal, 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 Section 20.5.4, "Copying an Asset" and Section 20.4.2, "Editing the Source Code of an Asset." This method works well if there is already a task flow style that closely matches your requirements and minimal code edits are needed.

However, if you need to make a lot of changes to the source code of the task flow style, it is recommended that you make those changes in JDeveloper and then upload the task flow style into WebCenter Portal. For more information about this method of round-trip development, see Section 20.8, "Working with Portal Assets in JDeveloper."

To create a task flow style in JDeveloper:

1. Create a copy of the existing task flow style that most closely meets your requirements. For more information, see Section 20.5.4, "Copying an Asset."
2. Download the new task flow style. For more information, see Section 20.5.7, "Downloading an Asset."
3. Import the downloaded task flow style into JDeveloper. For more information, see the "How to Import a Portal Resource into JDeveloper" section in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.
4. In JDeveloper, edit the task flow style to meet your requirements. For more information, see the "Developing Task Flow Styles" section in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.
5. Export the task flow style from JDeveloper.
   For more information, see the "How to Export a Portal Resource from JDeveloper" section in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.
6. Upload the archive file for the exported task flow style into your portal.
   For more information, see Section 20.5.8, "Uploading an Asset."

27.4.3 Editing a Task Flow Style

Use the Edit Source option to edit the source code of the task flow style's task flow definition file, view fragment, or the fragment's page definition file. You may want 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. For an example showing how to create a custom task flow style, see Section C.5, "Building and Using a Custom Task Flow Style with Predefined Columns."

If you need EL assistance, an application developer can provide an EL expression; see the "Expression Language Expressions" appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

For information about how to edit a task flow style's source files, see Section 20.4.2, "Editing the Source Code of an Asset."

**Tip:** To perform more advanced editing tasks, you may need to download the task flow style, edit it in JDeveloper, and upload it back to WebCenter Portal. For more information, see Section 20.8, "Working with Portal Assets in JDeveloper."

### 27.4.4 Managing Task Flow Styles

The following options are available on the Task Flow Styles page of the Assets and Shared Assets pages to enable you to manage task flow styles:

- **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 Section 20.5.9, "Deleting an Asset."

- **Upload**—You can upload a task flow style that has been created or edited in another portal or in JDeveloper.
  
  For more information, see Section 20.5.8, "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 Section 20.5.7, "Downloading an Asset."

- **Actions**
  - **Copy**—You can create a copy of a task flow style. Copying a task flow style enables you to replicate a local style in the runtime environment without having to actually export and upload the task flow style. As there is no option to create a task flow style from scratch, you can create a copy of a default style and replace its code with that of a custom visualization that you want to create.
    
    For more information, see Section 20.5.4, "Copying an Asset."

    For information about editing the source code of a copied task flow style, see Section 20.4.2, "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 Section 20.5.6, "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 Section 20.5.1, "Viewing Information About an Asset."

- **Edit Source**—For more information, see Section 20.4.2, "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 Section 20.5.5, "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 Section 20.5.2, "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 Section 20.5.3, "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 Section 20.5.5, "Setting Properties on an Asset."

### 27.5 Data Presenter Examples

To help you understand the tasks involved in using Data Presenter, Appendix C, "Data Presenter Examples" illustrates many Data Presenter use cases.

In addition, sample applications developed to showcase the different Data Presenter capabilities are published on Oracle Technology Network (OTN). The following page on OTN provides links to Data Presenter-specific samples and other sample applications that illustrate the different WebCenter Portal capabilities:

http://www.oracle.com/technetwork/middleware/webcenter/ps3-samples-176806.html

A readme file available with each sample on this page describes what the application illustrates and provides guidance for extending or customizing the application for real life use cases.
This chapter describes how to create and manage a Content Presenter template in WebCenter Portal.

This chapter includes the following topics:

- Section 28.1, "About Content Presenter Templates"
- Section 28.2, "Creating a Content Presenter Template"
- Section 28.3, "Managing Content Presenter Templates"

Permissions: To perform the tasks in this chapter on shared Content Presenter templates, you need the application-level permission Create, Edit, and Delete Content Presenter Templates. Users with the Application Specialist role have this permission by default. For more information about application-level permissions, see the "About Application Roles and Permissions" section in Administering Oracle WebCenter Portal.

To perform the tasks in this chapter on portal-level Content Presenter templates, you need the portal-level permission Create, Edit, and Delete Assets (standard permissions) or Create, Edit, and Delete Content Presenter Templates (advanced permissions). For more information about portal-level permissions, see Section 29.1, "About Roles and Permissions for a Portal."

28.1 About Content Presenter Templates

A Content Presenter template defines how Content Presenter renders content items on a portal page. WebCenter Portal provides several out-of-the-box Content Presenter templates to get you started, or your application developer can also create new custom display templates (as described in the 'Creating Content Presenter Display Templates' chapter in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper).

If a Content Presenter template is a shared asset, it is shown on the Assets page of all portals along with portal-specific templates.

A Content Presenter template can handle either single content items, multiple content items, or combinations 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.

When you add a Content Presenter task flow to a page, you will select a Content Presenter template in the Content Presenter Configuration dialog (see Chapter 33, "Publishing Content Using Content Presenter").
28.2 Creating a Content Presenter Template

If the out-of-the-box Content Presenter templates do not meet your needs, an application developer can create new custom display templates using JDeveloper, as described in the “Creating Content Presenter Display Templates” chapter in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

You can import custom Content Presenter templates using the Upload action (see Section 20.5.8, "Uploading an Asset").

28.3 Managing Content Presenter Templates

The following options are available on Content Presenter section of the Assets or Shared Assets page to enable you to manage Content Presenter Templates:

See Also: Section 20.2, "Accessing Portal Assets" and Section 59.2, "Accessing Shared Assets"

- **Delete**—You can delete a custom Content Presenter template when it is no longer required. You cannot delete an out-of-the-box template.
  
  For more information, see Section 20.5.9, "Deleting an Asset."

- **Upload**—You can upload an archive file that contains a Content Presenter template that has been developed using JDeveloper.
  
  For more information on uploading a template, see Section 20.5.8, "Uploading an Asset."

  Your WebCenter Portal developer can create Content Presenter templates as described in the "Creating Content Presenter Display Templates" chapter in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

  **Note:** The Download action is not active for out-of-the-box Content Presenter templates.

- **Security Settings (Actions menu)**—Each Content Presenter template has an associated Security Settings dialog that enables you to customize the security on the template.
  
  For more information, see Section 20.5.6, "Setting Security for an Asset."

- **Show Properties (Actions menu)**—Each Content Presenter template has an associated Show Properties dialog that summarizes useful information about it.
  
  For more information, see Section 20.5.1, "Viewing Information About an Asset."

- **Edit Source (Actions menu)**—You can directly edit the source code of a custom Content Presenter template. You cannot edit an out-of-the-box template.
  
  For more information, see Section 20.4.2, "Editing the Source Code of an Asset."
This part of Building Portals with Oracle WebCenter Portal provides information for the portal moderator about managing roles, permissions, and members in a portal.

- Chapter 29, "Managing Roles and Permissions for a Portal"
- Chapter 30, "Managing Members and Assigning Roles in a Portal"
- Chapter 31, "Working with the Portal Members Task Flow"
This chapter describes the out-of-the-box WebCenter Portal roles for working with portals, and how to establish security on a portal by modifying permissions on these roles, or creating and managing custom roles.

This chapter includes the following topics:

- Section 29.1, "About Roles and Permissions for a Portal"
- Section 29.2, "Defining Custom Roles for a Portal"
- Section 29.3, "Viewing and Editing Permissions of a Portal Role"
- Section 29.4, "Using Advanced Permissions"
- Section 29.5, "Deleting Roles in a Portal"

### Permissions:
To perform the tasks in this chapter, you need the portal-level permission Manage Membership. Users with this permission can manage portal members and their role assignments. A portal moderator has this permission by default.

For more information about permissions, see Section 29.1, "About Roles and Permissions for a Portal."

---

### 29.1 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, 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.

- **Portal-level roles** are Moderator, Viewer, and Participant. These roles are managed by the portal moderator, and are discussed in this chapter.

A portal moderator can modify the permissions of the default portal-level roles, create new custom roles to control what members can do in the portal, manage permission assignments for existing roles, and delete roles that are no longer required. Additionally, a portal moderator can grant the Authenticated-User (assigned to any user logged into WebCenter Portal) and Public-User roles permissions in the portal.

#### 29.1.1 Understanding the Default Roles for a Portal

Table 29–1 describes the default roles in a portal.
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About Roles and Permissions for a Portal

29.1.2 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, moderators can choose to assign standard permissions, or switch to advanced permissions:

- **Standard permissions:**
  - Administration permissions allow a moderator 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
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- Services (such as Announcements, Discussions, or Documents in standard permissions), or others through advanced permissions (see Table 29–3), 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.

- Announcements, Discussions, and Documents permissions allow a moderator to control access to announcements, discussions, and documents in the portal when these tools are enabled (see Section 39.2, "Enabling and Disabling Tools and Services Available to a Portal").

- Assets permissions collectively control access to all assets, including page templates, navigations, skins, resource catalogs, and so on.

See Table 29–2 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 moderator to assign the Manage Security and Configuration, Manage Configuration, or Manage Membership permission to a selected role.

  - Separate categories allow a moderator 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 29–3.

While advanced permissions give you more flexibility over role assignments, they can become complex to manage and maintain.

See Table 29–3 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 moderators 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 Section 29.4, "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 29–2 lists the permission categories and permissions that are available with standard permissions.
### Table 29–2  Portal Permissions - Standard Permissions

<table>
<thead>
<tr>
<th>Permission Category</th>
<th>Permissions</th>
<th>Roles Granted Permission By Default</th>
</tr>
</thead>
</table>
| 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. | Moderator |
|                     | **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. | |
|                     | **Manage Membership** - Enables access to the Roles and Members pages in the portal administration settings. On these pages, users can create, edit, and delete members and roles for the portal. | Moderator |
| Basic Services (Lists, Events, Links, and Notes) | **Edit Page Access, Structure, and Content** - Manage page access and edit page properties. Create, edit, and delete pages in the portal. Creating and deleting pages also requires Edit Navigations permission, as adding and deleting pages changes the portal navigation.  
This permission 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.  
Create, edit, and delete list data, events, links, and notes.  
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.  
With permissions on specific tools or services, also create, edit, and delete associated task flows and portlets. For example, working with documents in a portal requires Documents permissions. | Moderator |
|                     | **Edit Page Access and Structure** - Manage page access and edit properties of pages in the portal. With permissions on specific tools or services (Table 29–3), also create, edit, and delete associated task flows and portlets. Create, edit, and delete list data, events, links, and notes. | Moderator |
|                     | **Customize Pages and Edit Content** - Customize personal view of pages in the portal. Add and remove list data, events, links, and notes. | Moderator |
|                     | **View Pages and Content** - View pages, lists, events, and notes. With permissions on specific tools or services (Table 29–3), view associated task flows and portlets. | Moderator |
### Table 29–2 (Cont.) Portal Permissions - Standard Permissions

<table>
<thead>
<tr>
<th>Permission Category</th>
<th>Permissions</th>
<th>Roles Granted Permission By Default</th>
</tr>
</thead>
<tbody>
<tr>
<td>Announcements (available when the Announcements tool is enabled)</td>
<td>Create, Edit, and Delete Announcements - Perform any operation on announcements associated with the portal.</td>
<td>Moderator</td>
</tr>
<tr>
<td></td>
<td>Create and Edit Announcements - Create announcements. Edit and delete announcements that you create. Users with this permission must be allowed to view announcements.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>View Announcements - View announcements in the portal.</td>
<td></td>
</tr>
<tr>
<td>Assets</td>
<td>Create, Edit, and Delete Assets - Create, edit, and delete assets owned by the portal, such as page templates, navigations, resource catalogs, skins, page styles, Content Presenter templates, task flow styles, task flows, and data controls.</td>
<td>Moderator</td>
</tr>
<tr>
<td></td>
<td>Create Assets - Create new assets for the portal.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Edit Assets - Edit assets owned by the portal. Required to create and delete pages, as adding and deleting pages changes the portal navigation, which is a portal asset.</td>
<td></td>
</tr>
<tr>
<td>Discussions (available when the Discussions tool is enabled)</td>
<td>Create, Edit, and Delete Discussions - Perform any operation on discussions associated with the portal; create topics and replies. Edit and delete any topic or reply.</td>
<td>Moderator</td>
</tr>
<tr>
<td></td>
<td>Create and Edit Discussions - Create topics and replies. Edit topics and replies that you create. Users with this permission must be allowed to view discussions.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Reply To Discussions - Reply to existing topics and edit replies that you create. Users with this permission must be allowed to view discussions.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>View Discussions - View discussions.</td>
<td></td>
</tr>
<tr>
<td>Documents (available when the Documents tool is enabled)</td>
<td>Administration - Configure document workflows and access control settings.</td>
<td>Moderator</td>
</tr>
<tr>
<td></td>
<td>For more information, see Chapter 34, &quot;Working with Document Task Flows and Document Components.&quot;</td>
<td></td>
</tr>
</tbody>
</table>

See also Section 34.6.1, "Document Permissions Not Working in a Portal"
About Roles and Permissions for a Portal

Table 29–2 (Cont.) Portal Permissions - Standard Permissions

<table>
<thead>
<tr>
<th>Permission Category</th>
<th>Permissions</th>
<th>Roles Granted Permission By Default</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delete Documents</td>
<td>- 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.</td>
<td>Moderator</td>
</tr>
<tr>
<td>Create and Edit Documents</td>
<td>- 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 &quot;Modifying Content Security Configuration Using Fusion Middleware Control&quot; in Administering Oracle WebCenter Content. Users with this permission must be allowed to view folders and files.</td>
<td>Moderator</td>
</tr>
<tr>
<td>View Documents</td>
<td>- Browse files, folders, wikis, and blogs. Note: In a subportal, when you grant the View Documents permission to the Public-User role, the Authenticated-User role is also automatically granted the View Documents permission.</td>
<td>Moderator</td>
</tr>
</tbody>
</table>

Table 29–3 lists the permission categories and permissions that are available with advanced permissions.

Table 29–3 Portal Permissions - Advanced Permissions

<table>
<thead>
<tr>
<th>Permission Category</th>
<th>Permissions</th>
<th>Roles Granted Permission By Default</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administration</td>
<td>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.</td>
<td>Moderator</td>
</tr>
<tr>
<td>Manage Configuration</td>
<td>- 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.</td>
<td>Moderator</td>
</tr>
<tr>
<td>Manage Membership</td>
<td>- 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.</td>
<td>Moderator</td>
</tr>
<tr>
<td>Pages</td>
<td>Create, Edit, and Delete Pages - Create, edit, and delete pages in the portal. Creating and deleting pages also requires Edit Navigations permission, as adding and deleting pages changes the portal navigation. 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.</td>
<td>Moderator</td>
</tr>
</tbody>
</table>
### Table 29–3  (Cont.) Portal Permissions - Advanced Permissions

<table>
<thead>
<tr>
<th>Permission Category</th>
<th>Permissions</th>
<th>Roles Granted By Default</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Create Pages - With Edit Navigations permission, create pages in the portal.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Edit Pages - Edit page properties and content for any page in the portal.</td>
<td>Moderator</td>
</tr>
<tr>
<td></td>
<td>Delete Pages - With Edit Navigations permission, delete pages in the portal.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Customize Pages - Customize personal view of pages in the portal. Add and</td>
<td>Moderator, Participant</td>
</tr>
<tr>
<td></td>
<td>remove list content, events, links, and notes.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>View Pages - View pages, lists, events, and notes. With permissions on</td>
<td>Moderator, Participant,</td>
</tr>
<tr>
<td></td>
<td>specific tools or services, view associated task flows and portlets.</td>
<td>Viewer, Public-User (in public portals)</td>
</tr>
<tr>
<td>Announcements</td>
<td>Create, Edit, and Delete Announcements - Perform any operation on</td>
<td>Moderator</td>
</tr>
<tr>
<td>(available when the Announcements</td>
<td>announcements associated with the portal.</td>
<td></td>
</tr>
<tr>
<td>tool is enabled)</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Create and Edit Announcements - Create announcements. Edit and delete</td>
<td>Users with this permission must be allowed to view announcements.</td>
</tr>
<tr>
<td></td>
<td>announcements that you create.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>View Announcements - View announcements.</td>
<td></td>
</tr>
<tr>
<td>Content Presenter Templates</td>
<td>Create, Edit, and Delete Content Presenter Templates - Create, edit and</td>
<td>Create Content Presenter display templates for the portal.</td>
</tr>
<tr>
<td></td>
<td>Edit portal-level Content Presenter display templates.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>For more information, see Chapter 28, &quot;Working with Content Presenter</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Templates.&quot;</td>
<td></td>
</tr>
<tr>
<td>Data Controls</td>
<td>Create, Edit, and Delete Data Controls - Create, edit and delete</td>
<td>Create Data Controls -</td>
</tr>
<tr>
<td></td>
<td>data controls for the portal.</td>
<td>Create data controls for the portal.</td>
</tr>
<tr>
<td></td>
<td>Edit Data Controls - Edit portal-level data controls.</td>
<td>Edit portal-level data controls.</td>
</tr>
<tr>
<td></td>
<td>For more information, see Section 27.2, &quot;Working with Data Controls.&quot;</td>
<td></td>
</tr>
<tr>
<td>Discussions</td>
<td>Create, Edit, and Delete Discussions - Perform any operation on discussions</td>
<td></td>
</tr>
<tr>
<td>(available when the Discussions</td>
<td>associated with the portal; create topics and replies. Edit and delete</td>
<td>Moderator</td>
</tr>
<tr>
<td>tool is enabled)</td>
<td>any topic or reply.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Create and Edit Discussions - Create topics and replies. Edit topics and</td>
<td>Users with this permission must be allowed to view discussions.</td>
</tr>
<tr>
<td></td>
<td>replies that you create. Users with this permission must be allowed to view discussions.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Reply To Discussions - Reply to existing topics and edit replies that you</td>
<td>Users with this permission must be allowed to view discussions.</td>
</tr>
<tr>
<td></td>
<td>create. Users with this permission must be allowed to view discussions.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>View Discussions - View discussions.</td>
<td></td>
</tr>
</tbody>
</table>

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### About Roles and Permissions for a Portal

#### Table 29–3  (Cont.) Portal Permissions - Advanced Permissions

<table>
<thead>
<tr>
<th>Permission Category</th>
<th>Permissions</th>
<th>Roles Granted by Default</th>
</tr>
</thead>
</table>
| **Documents**       | **Administration** - Configure document workflows and access control settings.  
See also Section 34.6.1, "Document Permissions Not Working in a Portal"  
For more information, see Chapter 34, "Working with Document Task Flows and Document Components."
| 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. | Moderator                |
| 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 "Using Fusion Middleware Control to Modify Content Security Configuration" in Administering Oracle WebCenter Content.  
Users with this permission must be allowed to view folders and files. | Moderator                |
| View Documents      | - Browse files, folders, wikis, and blogs.  
Note: In a subportal, when you grant the View Documents permission to the Public-User role, the Authenticated-User role is also automatically granted the View Documents permission. | Moderator                |
| **Events**          | 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. | Moderator/Participant/Viewer/Public-User (in public portals) |
| **Links**           | Create and Delete Links - Create and delete links between objects, and manage link permissions.  
Create Links - Create links between objects.  
Delete Links - Delete a link between two objects. | Moderator                |
| **Lists**           | Create, Edit, and Delete Lists - Create, edit, and delete lists and list data.  
Create Lists - Create lists.  
Edit Lists - Edit list column definitions.  
Delete Lists - Delete any list.  
Edit List Data - Add, edit, and delete list data. | Moderator                |
### Table 29–3  (Cont.) Portal Permissions - Advanced Permissions

<table>
<thead>
<tr>
<th>Permission Category</th>
<th>Permissions</th>
<th>Roles Granted Permission By Default</th>
</tr>
</thead>
<tbody>
<tr>
<td>View Lists</td>
<td>View lists and list data.</td>
<td>Moderator</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Participant</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Viewer</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Public-User (in public portals)</td>
</tr>
<tr>
<td>Task Flow Styles</td>
<td>Create, Edit, and Delete Task Flow Styles - Create, edit and delete task flow styles for the portal.</td>
<td>Moderator</td>
</tr>
<tr>
<td></td>
<td>Create Task Flow Styles - Create task flow styles for the portal.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Edit Task Flow Styles - Edit portal-level task flow styles.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>For more information, see Section 27.4, &quot;Working with Task Flow Styles.&quot;</td>
<td></td>
</tr>
<tr>
<td>Navigations</td>
<td>Create, Edit, and Delete Navigations - Create, edit and delete navigations for the portal.</td>
<td>Moderator</td>
</tr>
<tr>
<td></td>
<td>Create Navigations - Create navigations for the portal.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Edit Navigations - Edit portal-level navigations. Required to create and delete pages, as adding and deleting pages changes the portal navigation.</td>
<td>Moderator</td>
</tr>
<tr>
<td></td>
<td>For more information, see Chapter 22, &quot;Working with Navigation Models.&quot;</td>
<td></td>
</tr>
<tr>
<td>Notes</td>
<td>Create, Edit, and Delete Notes - Create, edit and delete notes for the portal.</td>
<td>Moderator</td>
</tr>
<tr>
<td></td>
<td>Create Notes - Create notes for the portal.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Edit Notes - Edit portal-level notes.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Delete Notes - Delete notes in the portal.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>View Notes - View notes in the portal.</td>
<td>Moderator</td>
</tr>
<tr>
<td></td>
<td>For more information, see Chapter 51, &quot;Adding Personal Notes to a Portal.&quot;</td>
<td>Participant</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Viewer</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Public-User (in public portals)</td>
</tr>
<tr>
<td>Page Styles</td>
<td>Create, Edit, and Delete Page Styles - Create, edit and delete page styles for the portal.</td>
<td>Moderator</td>
</tr>
<tr>
<td></td>
<td>Create Page Styles - Create page styles for the portal.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Edit Page Styles - Edit portal-level page styles.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>For more information, see Chapter 25, &quot;Working with Page Styles.&quot;</td>
<td></td>
</tr>
<tr>
<td>Page Templates</td>
<td>Create, Edit, and Delete Page Templates - Create, edit and delete page templates for the portal.</td>
<td>Moderator</td>
</tr>
<tr>
<td></td>
<td>Create Page Templates - Create page templates for the portal.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Edit Page Templates - Edit portal-level page templates.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>For more information, see Chapter 21, &quot;Working with Page Templates.&quot;</td>
<td></td>
</tr>
</tbody>
</table>
If the default roles do not meet the requirements of your portal, moderators can define custom roles that better suit portal members. See Section 29.2, "Defining Custom Roles for a Portal."

Alternatively, moderators can modify the permissions assigned to the default roles. See Section 29.3, "Viewing and Editing Permissions of a Portal Role."

### 29.2 Defining Custom Roles for a Portal

If the default roles provided by WebCenter Portal do not meet the needs of the portal, you can define custom roles to better suit the requirements of your members.

To create a new role for a portal:

1. In the portal administration (see Section 7.1, "Accessing Portal Administration"), click **Security** in the left navigation pane, then click the **Roles** subtab (Figure 29–1).

   **Tip:** You can also navigate to this page using the direct URL provided in Section A.7, "Pretty URLs for Pages in a Specified Portal."
2. To define a new role for this portal, click **Create Role**.

   The Create Role dialog opens (Figure 29–2).

**Figure 29–2  Creating a New Role for a Portal**

3. Enter a suitable **Role Name**. Names can contain alphanumeric characters, blank spaces, @, and underscores. Ensure that role names are self-descriptive to make it as obvious as possible which member should belong to which roles.

4. Enter a **Description** for the role.

5. Optionally, select a **Role Template**.

   The new role inherits permissions from the role template. You can modify these permissions in the next step. If you do not select a role template, the new role is created with no permissions.

   - Choose **Moderator** to create a role that inherits full administrative privileges for the portal.
   - Choose **Viewer** (if available) to create a role starting with minimal, view-only privileges.
   - 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.
6. Click OK.

The new role appears as a column in the table on the Roles page.

7. To modify permissions for the role, click Edit Permissions, and then select or deselect each permission check box. For details, see Section 29.3, "Viewing and Editing Permissions of a Portal Role".

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

29.3 Viewing and Editing Permissions of a Portal Role

If the permissions assigned to a user role do not meet the needs of the portal, or you want to change previously assigned permissions, you can modify the permissions to better suit your role requirements.

Note: The Moderator role permission Manage Security and Configuration cannot be modified. Use caution in assigning this role to members because it contains full administrative privileges in the portal.

Note: The permissions inherent in the two seeded role templates allow users to view portal content. You can subsequently edit permissions for the user roles, as described in Section 29.3, "Viewing and Editing Permissions of a Portal Role."

To change the permissions assigned to a role:

1. In the portal administration (see Section 7.1, "Accessing Portal Administration"), click Security in the left navigation pane, then click the Roles subtab (Figure 29–3).

   Tip: You can also navigate to this page using the direct URL provided in Section A.7, "Pretty URLs for Pages in a Specified Portal."
2. Select the role you want to change, then click **Edit Permissions** to open the Edit Permissions dialog for the selected role.

3. In the Edit Permissions dialog, select or deselect the check boxes to enable or disable permissions for a role (Figure 29–4). See Table 29–2, "Portal Permissions - Standard Permissions" for more information.

For more granular settings, see Section 29.4, "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.
4. Click Save.

New permissions are effective immediately.

**Note:** For information about granting access to individual pages in a portal, refer to Section 13.15, "Setting Page Security."

### 29.4 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 is selected during template creation). See Section 3.3, "Creating a New Portal Template."

If you switch to using advanced permissions, you cannot revert to standard permissions. For more information, see Section 29.1.2, "Understanding Permissions and Permission Models in a Portal."

To use advanced permissions:

1. In the portal administration (see Section 7.1, "Accessing Portal Administration"), click Security in the left navigation pane, then click the Roles subtab (Figure 29–5).

   **Tip:** You can also navigate to this page using the direct URL provided in Section A.7, "Pretty URLs for Pages in a Specified Portal."
2. Click **Advanced Permissions**.
   
   A warning message displays (Figure 29–6).

   **Figure 29–6  Switching to Advanced Permissions**

   ![Advanced Permissions](image)

   This portal currently uses standard permissions, which provides a simple security model suitable for most applications.

   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 you switch to advanced permissions, you cannot revert back to standard permissions later. Do you want to continue?

   ![OK Cancel](image)

3. Click **OK** to continue.

4. In the Edit Permissions dialog, select or deselect the check boxes to enable or disable permissions for a role (Figure 29–7). See Table 29–3, "Portal Permissions - Advanced Permissions".
Deleting Roles in a Portal

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 29–7 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 Section 4.4, "Granting Users Access to a Portal".

29.5 Deleting Roles in a Portal

When a role is no longer required, the portal moderator can remove it from the portal. This helps maintain a valid role list and prevents inappropriate role assignment.

To delete a role in a portal:

1. In the portal administration (see Section 7.1, "Accessing Portal Administration"), click Security in the left navigation pane, then click the Roles subtab (Figure 29–8).

Tip: You can also navigate to this page using the direct URL provided in Section A.7, "Pretty URLs for Pages in a Specified Portal."
2. Select the role you want to delete, then click **Remove Role**.

   **Note:** The Moderator, 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.
Deleting Roles in a Portal
This chapter describes how to set up a portal membership policy and define member roles and responsibilities.

This chapter includes the following topics:

- Section 30.1, "About Portal Membership"
- Section 30.2, "Viewing the Members of a Portal"
- Section 30.3, "Setting Up Membership Options for a Portal"
- Section 30.4, "Composing Messages to New Members"
- Section 30.5, "Adding Members to a Portal"
- Section 30.6, "Changing Member Role Assignments"
- Section 30.7, "Approving Requests for Membership of a Portal"
- Section 30.8, "Communicating with Moderators and Members of a Portal"
- Section 30.9, "Revoking Membership to a Portal"

**Permissions:** To perform the tasks in this chapter, you need the portal-level permission Manage Membership. Users with this permission can manage portal members and their role assignments. A portal moderator has this permission by default.

For more information about permissions, see Section 29.1, "About Roles and Permissions for a Portal."

### 30.1 About Portal Membership

Member participation is central to any portal. It is the portal moderator's responsibility to manage membership and determine member participation through the permissions assigned to the various roles defined for the portal. A portal can gather members in several ways:

- If a portal is discoverable (see Section 4.3, "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 moderator (see Section 30.3.1, "Managing Self-Service Membership for a Portal").
If a portal is made public (see Section 4.5, "Granting Public Access to a Portal"), it is available to anyone with access to WebCenter Portal, providing that the Public-User role is granted appropriate permissions (see Section 29.3, "Viewing and Editing Permissions of a Portal Role").

Portal moderators can add or invite individual members or groups at the time a portal is created, or later (see Section 30.5, "Adding Members to a Portal").

### 30.2 Viewing the Members of a Portal

To review the current membership for a portal:

1. In the portal administration (see Section 7.1, "Accessing Portal Administration"), click Security in the left navigation pane, then click the Members subtab (Figure 30–1).

   **Tip:** You can also navigate to this page using the direct URL provided in Section A.7, "Pretty URLs for Pages in a Specified Portal."

   ![Figure 30–1 Portal Administration: Members Page](image)

2. In the Members area, review the current list of members and their current role assignments.

3. Using the Filter dropdown, select All Members to see a full list or select the name of a role to list members with a particular role.

### 30.3 Setting Up Membership Options for a Portal

Portal moderators 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. Moderators 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. Moderators can change these settings at any time. This section describes:

- Section 30.3.1, "Managing Self-Service Membership for a Portal"
- Section 30.3.2, "Managing Self-Service Membership Removal from a Portal"

### 30.3.1 Managing Self-Service Membership for a Portal

As a portal moderator, 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 moderator receives a subscription notification to accept or reject.

To manage self-service for a portal:

1. In the portal administration (see Section 7.1, "Accessing Portal Administration"), click Security in the left navigation pane, then click the Members subtab (Figure 30–2).

   **Tip:** You can also navigate to this page using the direct URL provided in Section A.7, "Pretty URLs for Pages in a Specified Portal."

   ![Portal Administration: Members Page](image)

2. Click Options to open the Membership Options dialog (Figure 30–3).
3. Under **Invite Options**, select **Enable Invite Portals Users** to allow portal moderators (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** checkbox displays only when WebCenter Portal workflows are configured. Refer your system administrator to the "Troubleshooting WebCenter Portal Workflows" section 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 other people can see the portal on their **Portals** page and through searches (see Section 4.3, "Making a Portal Known (Discoverable)").

   When you select this option:
   - Any WebCenter Portal user can join the portal (see the "Joining a Portal" section in *Using Oracle WebCenter Portal*).
– After joining the portal, members can change their role in the portal, or cancel their membership (see the "Changing Your Role in a Portal" and "Cancelling Your Portal Membership" sections in Using Oracle WebCenter Portal).

To that moderator approval is required before the request is granted, select Moderator Approval Required.

**Tip:** The Moderator Approval Required check box displays only when WebCenter Portal workflows are configured. Refer your system administrator to the "Troubleshooting WebCenter Portal Workflows" section 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 30–4).

**Figure 30–4 Choosing Roles Available on Self-Service Membership**

<table>
<thead>
<tr>
<th>Role</th>
<th>Self-Service Membership</th>
<th>Change Membership</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Enable</td>
<td>Approval Required</td>
</tr>
<tr>
<td>Viewer</td>
<td>✓</td>
<td>✗</td>
</tr>
<tr>
<td>Participant</td>
<td>✓</td>
<td>✗</td>
</tr>
<tr>
<td>Moderator</td>
<td>✓</td>
<td>✗</td>
</tr>
</tbody>
</table>

– Select Enable to offer the role on the Request Membership and Change Membership pages. Deselect Enable to hide a role.

– Select Approval Required to specify that moderator approval is required before the request is granted. The request is sent to the moderator’s worklist to approve or reject (if the portal has multiple moderators, all moderators receive the request; only one moderator is required to process the request). Deselect Approval Required to allow the change without moderator approval.

**Tip:** The Approval Required check box displays only when WebCenter Portal workflows are configured. Refer your system administrator to the "Troubleshooting WebCenter Portal Workflows" section in Administering Oracle WebCenter Portal.

5. Click Save.
30.3.2 Managing Self-Service Membership Removal from a Portal

If moderator approval is required to unsubscribe from a portal, an unsubscription request is sent to the moderator's worklist when a member leaves, which the moderator can choose to either accept or reject.

To configure approval options for cancelling portal membership:

1. In the portal administration (see Section 7.1, "Accessing Portal Administration"), click Security in the left navigation pane, then click the Members subtab (Figure 30–5).

   **Tip:** You can also navigate to this page using the direct URL provided in Section A.7, "Pretty URLs for Pages in a Specified Portal."

   **Figure 30–5 Portal Administration: Members Page**

   2. Click Options to open the Membership Options dialog.

   3. Under Membership Self-Service (Figure 30–6):

   - To specify that moderator approval is required to leave a portal, select Moderator Approval Required for Self-Service Membership Removal.
   - To allow members to leave without approval, deselect Moderator Approval Required for Self-Service Membership Removal.

   **Tip:** This check box displays only when WebCenter Portal workflows are configured. Refer your system administrator to the "Troubleshooting WebCenter Portal Workflows" section in Administering Oracle WebCenter Portal.
30.4 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 Worklist service 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 Section 7.1, "Accessing Portal Administration"), click Security in the left navigation pane, then click the Members subtab (Figure 30–7).

   Tip: You can also navigate to this page using the direct URL provided in Section A.7, "Pretty URLs for Pages in a Specified Portal."

Figure 30–7 Portal Administration: Members Page
2. Click **Options** to open the Membership Options dialog (Figure 30–3).

**Figure 30–8  Membership Options Dialog**

- **Invitation Options**
  - Enable Invitation Portals Users

- **Membership Self-Service**
  - Join: Do Not Allow Self-Service Membership or Self-Service Membership Change
  - Allow Self-Service Membership or Self-Service Membership Change (All Roles Available)
  - Moderate Approval Required
  - Allow Self-Service Membership or Self-Service Membership Change (Selected Roles Available)
  - Remove: Moderate Approval Required for Self-Service Membership Removal

- **Membership Notification Messages**
  - **Add Member Message**
  - **Invite Member Message**
  - **Invite Non-Registered User Message**

3. Under **Membership Notification Messages**, enter messages in the appropriate sections, as required:

   - **Add Member Message** - Enter a short message to include in membership notifications. Use the message text to welcome new members and introduce your 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 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 worklist and mail.

   **Tip:** This section displays only when WebCenter Portal workflows and SOA server are configured. Refer your system administrator to the “Troubleshooting WebCenter Portal Workflows” section 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.

30.5 Adding Members to a Portal

This section describes various ways that a moderator can enlist members for your portal:
- Section 30.5.1, "Searching for a User or Group in the Identity Store,"
- Section 30.5.2, "Adding Registered Users and Groups"
- Section 30.5.3, "Inviting a Registered User"
- Section 30.5.5, "Allowing a Registered User to Self-Subscribe"
- Section 30.5.4, "Inviting a Non-Registered User"

30.5.1 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 construct your search string. For example, the following tasks require you to specify a user or group name:
- "Composing and Sending Mail Messages" in Using Oracle WebCenter Portal
- "Setting Security Options on a Folder or File" in Using Oracle WebCenter Portal
- "Running an Advanced Document Search" in Using Oracle WebCenter Portal
- Section 3.7, "Setting Up Access to a Portal Template"
- Section 13.15, "Setting Page Security"
- Section 20.5.6, "Setting Security for an Asset"
- Section 30.5.2, "Adding Registered Users and Groups"
- Section 30.5.3, "Inviting a Registered User"
- Section 58.8, "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 30–1 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 30–2.

**Table 30–1  Search Terms That Find James Robert van Order**

<table>
<thead>
<tr>
<th>Search Terms</th>
<th>Search Results</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jam</td>
<td>All found in First Name (James Robert).</td>
</tr>
<tr>
<td>jam*</td>
<td>Results show all users where search term begins the First Name, Last Name, Mail Address, User ID, or Common Name.</td>
</tr>
<tr>
<td>*ames</td>
<td>Results show all users where search term begins the First Name, Last Name, Mail Address, User ID, or Common Name.</td>
</tr>
<tr>
<td>*bert</td>
<td>Results show all users where search term begins the First Name, Last Name, Mail Address, User ID, or Common Name.</td>
</tr>
<tr>
<td>van</td>
<td>Both found in Last Name (van Order).</td>
</tr>
<tr>
<td>*Order</td>
<td>Results show all users where search term begins the First Name, Last Name, Mail Address, User ID, or Common Name.</td>
</tr>
<tr>
<td>jumbo</td>
<td>jimbo found in User ID (jimbo).</td>
</tr>
<tr>
<td>Jim</td>
<td>Results show all users where search term begins the First Name, Last Name, Mail Address, User ID, or Common Name.</td>
</tr>
<tr>
<td>*imbo</td>
<td>Results show all users where search term begins the First Name, Last Name, Mail Address, User ID, or Common Name.</td>
</tr>
<tr>
<td>jim</td>
<td>jim found in Mail Address (<a href="mailto:jim.van.order@example.com">jim.van.order@example.com</a>), User ID (jimbo), and Common Name (Jim).</td>
</tr>
<tr>
<td>Jim</td>
<td>Results show all users where search term begins the First Name, Last Name, Mail Address, User ID, or Common Name.</td>
</tr>
<tr>
<td>James Order</td>
<td>James found in First Name (James Robert); Order not found in Last Name (van Order).</td>
</tr>
<tr>
<td>james order</td>
<td>Results show all users where first search term begins the First Name, or second search term begins the Last Name.</td>
</tr>
<tr>
<td>Robert van</td>
<td>Robert not found in First Name (James Robert); van found in Last Name (van Order).</td>
</tr>
<tr>
<td>robert Van</td>
<td>Results show all users where first search term begins the First Name, or second search term begins the Last Name.</td>
</tr>
<tr>
<td>James van Order</td>
<td>James found in First Name (James Robert), Order not found in Last Name (van Order).</td>
</tr>
<tr>
<td>james Van order</td>
<td>Results show all users where first search term begins the First Name, or last search term begins the Last Name. Intervening term is ignored.</td>
</tr>
</tbody>
</table>
Adding Members to a Portal

Managing Members and Assigning Roles in a Portal

30.5.2 Adding Registered Users and Groups

As a portal moderator, 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 SOA server is configured to send mail).

To add a member to your portal:

1. In the portal administration (see Section 7.1, "Accessing Portal Administration"), click Security in the left navigation pane, then click the Members subtab (Figure 30–9).

   Tip: You can also navigate to this page using the direct URL provided in Section A.7, "Pretty URLs for Pages in a Specified Portal."

---

Table 30–1 (Cont.) Search Terms That Find James Robert van Order

<table>
<thead>
<tr>
<th>Search Terms</th>
<th>Search Results</th>
</tr>
</thead>
<tbody>
<tr>
<td>James Robert van Order</td>
<td>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.</td>
</tr>
<tr>
<td>james robert Van order</td>
<td>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.</td>
</tr>
</tbody>
</table>

Table 30–2 Search Terms That Do Not Find James Robert van Order

<table>
<thead>
<tr>
<th>Search Terms</th>
<th>Search Results</th>
</tr>
</thead>
<tbody>
<tr>
<td>ames</td>
<td>ame not found in First Name (James Robert), Last Name (van Order), Mail Address (<a href="mailto:jim.van.order@example.com">jim.van.order@example.com</a>), 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.</td>
</tr>
<tr>
<td>Order</td>
<td>Order not found in First Name (James Robert), Last Name (van Order), Mail Address (<a href="mailto:jim.van.order@example.com">jim.van.order@example.com</a>), 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.</td>
</tr>
<tr>
<td>order</td>
<td>Order not found in First Name (James Robert), Last Name (van Order), Mail Address (<a href="mailto:jim.van.order@example.com">jim.van.order@example.com</a>), 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.</td>
</tr>
<tr>
<td>Robert Order</td>
<td>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.</td>
</tr>
<tr>
<td>robert order</td>
<td>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.</td>
</tr>
</tbody>
</table>
2. (Optional) On the **Members** page, click **Options** to edit the greeting messages sent to new members (see Section 30.4, “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 30–10).
   
   If you are not sure of the name, you can search the identity store. See Section 30.5.1, “Searching for a User or Group in the Identity Store.”

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 Section 29.2, "Defining Custom Roles for a Portal").

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 the "Configuring the Identity Store" section in *Administering Oracle WebCenter Portal*.

- For WebCenter Portal to properly maintain enterprise group-to-role mappings, back-end servers, such as the discussions server and content server, must support enterprise groups too. When back-end servers do not support enterprise groups, the message "Group [name] not found in the Identity Store" displays. For more information, see the "Troubleshooting Issues with Users and Roles" section in *Administering Oracle WebCenter Portal*.

---

### 30.5.3 Inviting a Registered User

As a portal moderator, 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 Worklists are configured).

To invite someone to become a member of your portal:

1. In the portal administration (see Section 7.1, "Accessing Portal Administration"), click **Security** in the left navigation pane, then click the **Members** subtab (Figure 30–11).

**Tip:** You can also navigate to this page using the direct URL provided in Section A.7, "Pretty URLs for Pages in a Specified Portal."


2. (Optional) On the Members page, click Options to edit the greeting message sent to invited members (see Section 30.4, "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 moderator has selected Enable Invite Portals Users in the Membership Options dialog (see Section 30.3.1, "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 30–12).

   If you are not sure of the name you can search the identity store. For search tips, see Section 30.5.1, "Searching for a User or Group in the Identity Store."

5. Select one or more user names from the list.

6. Select a role for the invited members. If the role you want is not listed, create a role that meets your requirements (see Section 29.2, "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 worklist (if Worklists are configured) 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.

### 30.5.4 Inviting a Non-Registered User

If your system administrator has allowed non-registered people to self-register, portal moderators can invite anyone with a valid mail address to join the portal. Prospective members receive an invitation by 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 Section 7.1, “Accessing Portal Administration”), click **Security** in the left navigation pane, then click the **Members** subtab (Figure 30–13).

   **Tip:** You can also navigate to this page using the direct URL provided in Section A.7, “Pretty URLs for Pages in a Specified Portal.”

   ![Figure 30–13  Portal Administration: Members Page](image)

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 Section 30.4, “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**.
4. Enter the Email Address(es) for one or more prospective members, separated by commas.

5. Select a Role for the prospective members. If the role you want is not listed, create a role that meets your requirements (see Section 29.2, "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.

### 30.5.5 Allowing a Registered User to Self-Subscribe

Self-subscription enables existing WebCenter Portal users to request membership without an invitation from the portal moderator. 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 Section 30.3.1, "Managing Self-Service Membership for a Portal."

If a user's self-subscription request is pending approval by the portal moderator, 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.

### 30.6 Changing Member Role Assignments

A portal moderator can change a member's role at any time. Users are notified of membership changes through their worklist.

To change a member's current role in a portal:

1. In the portal administration (see Section 7.1, "Accessing Portal Administration"), click Security in the left navigation pane, then click the Members subtab (Figure 30–14).

   **Tip:** You can also navigate to this page using the direct URL provided in Section A.7, "Pretty URLs for Pages in a Specified Portal."
2. On the Members page, select one or more members (Ctrl+click to select multiple members), and then click Change Role.

3. In the Change Role dialog, select a different role.

   If you are not sure which role to select, click the Roles tab to determine the range of actions that current roles allow (see Section 29.3, "Viewing and Editing Permissions of a Portal Role"). If the existing roles do not meet your requirements, consider creating a new role (see Section 29.2, "Defining Custom Roles for a Portal").

4. Click OK.

### 30.7 Approving Requests for Membership of a Portal

As a portal moderator, notifications appear in your worklist to approve or reject requests for portal membership or a new role in the portal. For more information, see the "Exploring Your Worklists" chapter in Using 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.

### 30.8 Communicating with Moderators and Members of a Portal

You can send messages to individual members, and also to the moderator(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 Section 48.2, "Configuring the Mail Distribution List for a Portal."

Any user can send mail to the members or the moderators of a portal from the portal browser or when viewing a portal, as described in the "Sending Mail to Portal Members or Moderators" section in Using Oracle WebCenter Portal.
Portal moderators can also send mail to all members or individual members of a portal from the Members page:

1. In the portal administration (see Section 7.1, "Accessing Portal Administration"), click Security in the left navigation pane, then click the Members subtab (Figure 30–15).

   **Tip:** You can also navigate to this page using the direct URL provided in Section A.7, "Pretty URLs for Pages in a Specified Portal."

   ![Figure 30–15 Portal Administration: Members Page](image)

2. Under Members:

   - To send a message to all members of the portal, click Mail Members.
   - To send a message to an individual member, click the member's icon, and then click the member's mail address.

   For information about the mail service, see Chapter 48, "Adding Mail to a Portal."

### 30.9 Revoking Membership to a Portal

Moderators can revoke user membership for a portal at any time. Users receive notification through their worklist when you cancel their individual or group membership.

To revoke membership:

1. In the portal administration (see Section 7.1, "Accessing Portal Administration"), click Security in the left navigation pane, then click the Members tab (Figure 30–16).

   **Tip:** You can also navigate to this page using the direct URL provided in Section A.7, "Pretty URLs for Pages in a Specified Portal."
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.
This chapter describes how to add a Portal Members task flow to a page, and how to work with the task flow.

This chapter includes the following topics:

- Section 31.1, "About the Portal Members Task Flow"
- Section 31.2, "Adding a Portal Members Task Flow to a Page"
- Section 31.3, "Managing Portal Membership Through the Portal Members Task Flow"
- Section 31.4, "Contacting All Portal Members"
- Section 31.5, "Contacting Individual Members of a Portal"
- Section 31.6, "Sorting Portal Members"
- Section 31.7, "Filtering Portal Members"
- Section 31.8, "Setting Portal Members Task Flow Properties"

Permissions: To perform the tasks in this chapter, you need the portal-level Manage Membership permission. Users with this permission can manage portal members and their role assignments. A portal moderator has this permission by default.

For more information about permissions, see Section 29.1, "About Roles and Permissions for a Portal."

### 31.1 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 Chapter 11, "Working with the Portal Browser Task Flow."

- **Portal Members** task flow (Figure 31–1): 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.
31.2 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 Section 14.2, "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 Section 23.5.1, "Adding a Resource to a Resource Catalog" (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 Section 7.3.5, "Changing the Resource Catalogs for Pages and the Page Template for a Portal."

---

31.3 Managing Portal Membership Through the Portal Members Task Flow

Moderators 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 31–2).
   - The Add icon displays only to moderators or members with Manage Membership permission in the portal.

2. On the Security page, click the Members tab (Figure 31–3), where you can add members as described in Section 30.5.2, "Adding Registered Users and Groups."
3. On the Members tab, you can also remove members, invite users to join the portal, and edit existing member roles. For more information, see Chapter 30, "Managing Members and Assigning Roles in a Portal."

### 31.4 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 31–4).

   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 the "Setting Your Personal Preferences" chapter in *Using Oracle WebCenter Portal*.

2. Compose your message and click Send.
31.5 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 31–5).

**Figure 31–5  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 the "Viewing a Profile" section in *Using Oracle WebCenter Portal*.

The profile does not display if the Profile Launched on Selection parameter is disabled, for details see Section 31.8.2, "Portal Members Task Flow Parameters."

31.6 Sorting Portal Members

You can sort the list of members by name or by recent activity. Use the Sort Criteria parameter described in Section 31.8.2, "Portal Members Task Flow Parameters."

31.7 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 31–6), and then click the Filter arrow icon to the right of the field.
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. Alternatively, filter the members by role by selecting a Role from the dropdown list.

4. To return the list of members to its default display, click the Clear Filter icon (Figure 31–7) and select All Members from the Role dropdown list.

31.8 Setting Portal Members Task Flow Properties
The Portal Members task flow has associated properties, which users with sufficient privileges can access through the Component Properties dialog in Composer (Figure 31–8).
For information about accessing the Component Properties dialog, see Section 14.3, "Modifying Component Properties."

The following sections provide information about properties of the Portal Members task flow and describe the properties on the Parameters tab:

- Section 31.8.1, "About the Portal Members Task Flow Properties"
- Section 31.8.2, "Portal Members Task Flow Parameters"

### 31.8.1 About the Portal Members Task Flow Properties

The properties on the Parameters tab of the Component Properties dialog control the default task flow content. For descriptions of the parameters on this tab, see Section 31.8.2, "Portal Members Task Flow Parameters". For some task flows, parameters on this tab facilitate the wiring of the task flow to page parameters and page definition variables. For more information, see Chapter 19, "Wiring Pages, Task Flows, Portlets, and ADF Components."

Changes to the properties on the Display Options, Style, and Content Style tabs affect the appearance and behavior of the task flow for all users. These properties are common to all task flows. For more information, see Section 14.3.4, "Working with Component Display Options" and Section 14.3.6, "Working with Style and Content Style Properties."

The contents of the Events tab depend on the events supported by the task flow. For more information, see Section 14.3.7, "Working with Component Contextual Events."

All properties on the Parameters and Display Options tabs provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the Show icon next to a property field to open the editor.
Note: When you enter EL on the generic Display Options tab in the Component Properties 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 14–1.

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

If you need EL assistance, an application developer can provide an EL expression; see the "Expression Language Expressions" appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

31.8.2 Portal Members Task Flow Parameters

Table 31–1 describes the parameters that are unique to the Portal Members task flow.

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
</table>
| Number of Columns     | The number of columns used to display members. The default is null which means 'no limit' and in this case member details wrap to fill the entire width of the task flow. To fix the number of members displayed in each row, enter the number of 'columns' you require. Horizontal scroll bars display if there is not enough space to display the number of members specified here. Express values using the following formats:  
  ■ Constant—Express a constant value, such as 2 or 5.  
  ■ Page parameter—Enter a page parameter to fetch the value from the page on which the task flow is placed. For more information, see Chapter 19, "Wiring Pages, Task Flows, Portlets, and ADF Components."  
  ■ EL expression—Enter an Expression Language (EL) expression. |
| Number of Rows        | The number of rows used to display members. The default is null which means that member details wrap to fill the space available. Vertical scroll bars display if there is not enough space to display all the members. To fix the maximum number of rows displayed, enter the number of 'rows' you require. Previous and Next buttons automatically display if more member details are available. Express values using the following formats:  
  ■ Constant—Express a constant value, such as 2 or 5.  
  ■ Page parameter—Enter a page parameter to fetch the value from the page on which the task flow is placed. For more information, see Chapter 19, "Wiring Pages, Task Flows, Portlets, and ADF Components."  
  ■ EL expression—Enter an Expression Language (EL) expression. |
Setting Portal Members Task Flow Properties

Table 31–1  (Cont.) Portal Members task flow Properties: Parameters Tab

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Profile Launched on Selection</td>
<td>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.</td>
</tr>
<tr>
<td>Sort Criteria</td>
<td>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.</td>
</tr>
</tbody>
</table>
| 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 Chapter 19, "Wiring Pages, Task Flows, Portlets, and ADF Components.”  
  ■  **EL expression**—Enter an Expression Language (EL) expression. |
This part of *Building Portals with Oracle WebCenter Portal* provides information about working with content in a portal, including using Content Presenter, adding the task flows and components provided by the Documents tool to a page, establishing workflow on documents, and adding wikis and blog to a portal.

- Chapter 32, "Introduction to Working with Content"
- Chapter 33, "Publishing Content Using Content Presenter"
- Chapter 34, "Working with Document Task Flows and Document Components"
- Chapter 35, "Setting Document Task Flow and Document Component Properties"
- Chapter 36, "Working with Workflow-Enabled Content"
- Chapter 37, "Adding a Wiki to a Portal"
- Chapter 38, "Adding a Blog to a Portal"
This chapter describes the functionality available to add and manage content in a portal. You can add content from one or more connected content repositories in a variety of ways. You can use the Content Presenter task flow to precisely customize the selection and presentation of content, or you can use a document task flow that suits your purposes for presenting content management functionality. You can also add individual folders and files to a page using links, images, or inline frames.

This chapter includes the following topics:

- Section 32.1, "About Adding Content to a Portal"
- Section 32.2, "About Content Management Selections in the Resource Catalog"

Permissions: To perform the tasks in this chapter, you need the following portal-level permissions:

- Basic Services: Edit Page Access and Structure (standard permissions) or Pages: Edit Pages (advanced permissions)
- Documents permissions (advanced permissions).

For more information about permissions, see Section 29.1, "About Roles and Permissions for a Portal."

32.1 About Adding Content to a Portal

WebCenter Portal provides the following types of 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:

- Content Presenter. Enables you to precisely customize the selection and presentation of content in a portal. The Content Presenter task flow is available only when the connected content repository is Content Server and your system administrator has completed the prerequisite configuration. With Content Presenter, you can select a single item of content, contents under a folder, a list of items, query for content, or select content based on the results of a Personalization Conductor scenario, and then select a template to render the content on a page in a portal. 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 Chapter 33, "Publishing Content Using Content Presenter."
■ **Document task flows.** Offer capabilities to create, open, edit, delete, copy, rename, move, share, search, view, or manage information about folders and files in the connected content repository, including wikis and blogs. Document task flows provide a variety of formats to display folders and files, including wikis and blogs, on a page in a portal. The document task flows are available when the connected content repository is Content Server, Oracle Portal, or SharePoint, and your system administrator has completed the prerequisite configuration.

**Learn More:** For information about the document task flows available in WebCenter Portal, and the unique characteristics of each task flow, see Chapter 34, "Working with Document Task Flows and Document Components."

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

**Learn More:** For information about document components you can add to a page in a portal, see Section 34.2, "About Document Components."

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

**Learn More:** For information about including wikis in a portal, see Chapter 37, "Adding a Wiki to a Portal."

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

**Learn More:** For information about including blogs in a portal, see Chapter 38, "Adding a Blog to a Portal."

After an application specialist or portal moderator has provided access to content by adding task flows or components to a page, end users can create and edit content at runtime, collaborate on documents, integrate with Microsoft Office and Windows Explorer, and add wikis and blogs to a portal. The tasks are described for end users in the "Working with Documents," "Working with Wikis," and "Working with Blogs" chapters in *Using Oracle WebCenter Portal.*

### 32.2 About Content Management Selections in the Resource Catalog

WebCenter Portal users with permissions to edit pages use the resource catalog to add content to a page.

In Design view and Select view of the page editor (Composer), the resource catalog appears in the right pane (Figure 32–1).

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**Learn More:** For information about the document task flows available in WebCenter Portal, and the unique characteristics of each task flow, see Chapter 34, "Working with Document Task Flows and Document Components."

**Learn More:** For information about document components you can add to a page in a portal, see Section 34.2, "About Document Components."

**Learn More:** For information about including wikis in a portal, see Chapter 37, "Adding a Wiki to a Portal."

**Learn More:** For information about including blogs in a portal, see Chapter 38, "Adding a Blog to a Portal."
In Structure view of the page editor, the resource catalog appears as a dialog when you select a component and click the Add icon (Figure 32–2).

Figure 32–1  Default Resource Catalog in Design View of the Page Editor

Figure 32–2  Add Content in Structure View of the Page Editor Displaying Default Resource Catalog
The presence or location of the content selections in the resource catalog depends on how the resource catalog is configured. For example, in the Default Portal Catalog, open the Content Management folder to expose the content task flows and document components (Figure 32–3).

*Figure 32–3 Opening the Content Management Folder in the Resource Catalog*

In the Content Management folder of the resource catalog, you can add content containers in either of the following ways:

- Click **Add** next to a task flow to add the task flow standalone to the current page, independent of content (Figure 32–4). After adding the task flow, you can populate it with content.

---

**Note:** There is no resource catalog in Preview view of the page editor.
Click Open next to All Content, Portal Documents (in a portal), or Personal Documents (in the Home portal) to drill down to a folder or file that you want to add to the current page, then click Add to display a menu where you can select the content container in which to display the folder or file (Figure 32–5, Figure 32–6, and Figure 32–7).
Figure 32–5  Resource Catalog Content Management: Adding a Folder

Figure 32–6  Resource Catalog Content Management: Adding an HTML File
Figure 32–7  Resource Catalog Content Management: Adding an Image File

For detailed descriptions about the document task flows and document components, and how to use them, see Chapter 34, "Working with Document Task Flows and Document Components."
About Content Management Selections in the Resource Catalog
This chapter describes how to publish content on a page in WebCenter Portal using the Content Presenter task flow.

This chapter includes the following topics:

- Section 33.1, "About the Content Presenter Task Flow"
- Section 33.2, "Adding a Content Presenter Task Flow to a Page"
- Section 33.3, "Displaying the Content Presenter Configuration Dialog"
- Section 33.4, "Selecting Content"
- Section 33.5, "Selecting a Display Template"
- Section 33.6, "Previewing the Results"
- Section 33.7, "Using Responsive Templates"
- Section 33.8, "Adding Links from Content to Navigation Nodes"
- Section 33.9, "Authoring Site Studio Content to Optimize Presentation in Content Presenter"
- Section 33.10, "Creating or Editing Site Studio Content in the Content Presenter Configuration Dialog"
- Section 33.11, "Creating and Editing Files In-Context in a Content Presenter Task Flow"
- Section 33.12, "Approving and Rejecting Files in Workflow"
- Section 33.13, "Setting Content Presenter Task Flow Properties"

Permissions: To perform the tasks in this chapter, you need the following portal-level permissions:

- Basic Services: Edit Page Access and Structure (standard permissions) or Pages: Edit Pages (advanced permissions)
- Documents (advanced permissions)

For more information about permissions, see Section 29.1, "About Roles and Permissions for a Portal."

33.1 About the Content Presenter Task Flow

Content Presenter enables you to precisely customize the selection and presentation of content in a portal. The Content Presenter task flow is available only when the
connected content repository is Content Server and your system administrator has completed the prerequisite configuration.

See Also:

- "Configuring an Oracle WebCenter Content Server Repository" in Administering Oracle WebCenter Portal
- "Creating a Content Repository Connection Based on the Oracle Content Server Adapter" in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper

With Content Presenter, you can select a single item of content, contents under a folder, a list of items, query for content, or select content based on the results of a Personalization Conductor scenario, and then select a template to render the content on a page in a portal.

Notes:

- Content Presenter is intended to render (present) content, not to host HTML content. To host HTML content, use the Web Page component to render the HTML content from Content Server. For more information, see Section 15.11, "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 the "Revision Status" section in the 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 Section 33.1.1, "Understanding Site Studio Integration."

Content Presenter has no dependency on the Documents tool for adding or managing the content it displays.

33.1.1 Understanding Site Studio Integration

Oracle Site Studio is a powerful, flexible web development application suite that offers a comprehensive approach to designing, building, and maintaining enterprise-scale web sites. Site Studio uses Content Server as the main repository for a web site.

Content Presenter integrates with Site Studio to allow you to create, access, edit, and display Site Studio contributor data files in either a custom Content Presenter display template that makes use of region definitions or a Site Studio region template.
Before you can display Site Studio contributor data files in Content Presenter, the system administrator must complete the following tasks, described in *Administering Oracle WebCenter Portal*:

- Enable Site Studio components, and configure the cookie path to the context root of your application to prevent losing your session when editing Site Studio content, as described in the "Configuring Content Server" chapter in *Administering Oracle WebCenter Portal*, specifically the "Setting Up Site Studio" section.

- Enable the `WebCenterConfigure` component to allow for adding and editing Site Studio documents from within Content Presenter, as described in the "Enabling the WebCenterConfigure Component" section 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 default navigation model, as described in *Section 33.8, "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 *Section 33.9, "Authoring Site Studio Content to Optimize Presentation in Content Presenter."*

You can create and edit Site Studio contributor data files from the Content Presenter Configuration dialog (see *Section 33.10, "Creating or Editing Site Studio Content in the Content Presenter Configuration Dialog") or in-context when displayed in Content Presenter at runtime (see *Section 33.11, "Creating and Editing Files In-Context in a Content Presenter Task Flow").

**Tip:** Oracle recommends that you use Content Presenter ADF templates (that use region definitions) to integrate Site Studio and WebCenter Portal rather than use Site Studio region templates. The region templates display the *details of the contributor data file* rather than the *contributed content*. For more information, see the "Creating Content Presenter Display Templates" chapter in *Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper*.
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).

33.2 Adding a Content Presenter Task Flow to a Page

To add a Content Presenter task flow to a page:

1. Open the page in edit mode (see Section 12.4.3, "Opening a Page in the Page Editor (Composer)").

   **Note:** By default, the view switcher is set to Web and Composer displays the page in Design view showing the inline resource catalog.

2. Navigate to the section of the resource catalog that provides access to the folders and files in the connected content repository.

   **Tip:** The presence or location of this section depends on how the resource catalog is configured. For example, in the Default Portal Catalog, next to Content Management, click Open to expose the content selections (Figure 33–1).
Figure 33–1  Opening the Content Management Section in the Resource Catalog

For information about the selections shown in the Default Portal Catalog, see Section 32.2, "About Content Management Selections in the Resource Catalog."

3. Add the Content Presenter task flow to the page in one of two ways:
   - Next to Content Presenter, click Add (Figure 33–2).
A new empty region appears on your page (Figure 33–3).

Drill down in the resource catalog to the folder or file you want to display on the page: In the Default Portal Catalog, next to All Content (or, in a portal, Portal Documents or Personal Documents), click Open until you locate the target content, then click Add, and select Content Presenter from the menu (Figure 33–4).

**Note:** Content Server exposes a content item only after it has a revision status of Released. If the 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 the "Revision Status" section in the Using Oracle WebCenter Content.
The selected folder or file displays in a default display template, as shown in Figure 33–5 and Figure 33–6.

**Figure 33–5  **Content Presenter Task Flow: Default Template for Word Document

![Content Presenter Task Flow: Default Template for Word Document](image)

**Figure 33–6  **Content Presenter Task Flow: Default Template for Image File

![Content Presenter Task Flow: Default Template for Image File](image)

### 33.3 Displaying the Content Presenter Configuration Dialog

The Content Presenter Configuration dialog enables you to easily configure the Content Presenter task flow to select or change content, or select a different display template.

**Note:** You can also specify content and a display template by clicking the properties **Edit** icon (the second wrench icon in the task flow chrome) and specifying parameters on the **Parameters** tab of the Component Properties dialog. However, specifying parameters in this way is generally intended for use at design time by developers creating a WebCenter Portal Framework application, or for advanced users who want to bind a parameter to an EL expression. If you modify a property value in the Component Properties dialog, the new value overrides the value specified in the Content Presenter Configuration dialog, and that value cannot subsequently be changed through the Content Presenter Configuration dialog. For information about Content Presenter task flow parameters, see **Section 33.13, "Setting Content Presenter Task Flow Properties."**

To display the Content Presenter Configuration dialog:
1. In the Content Presenter task flow (see Section 33.3, "Displaying the Content Presenter Configuration Dialog"), click the task flow Edit icon (the first wrench icon in the task flow chrome) (Figure 33–7).

![Editing a Content Presenter Task Flow](Image)

Figure 33–7  Editing a Content Presenter Task Flow

The Content Presenter Configuration dialog opens (Figure 33–8).

![Content Presenter Configuration Dialog](Image)

Figure 33–8  Content Presenter Configuration Dialog

A check mark alongside an item indicates that the required information is complete and valid.

### 33.4 Selecting Content

**Note:** Content Presenter does not support non-ASCII characters in files that are encoded using the non-UTF-8 character encoding. When users preview such files in Content Presenter, non-ASCII characters appear garbled.

Depending on the type of content you want to display, complete the steps in one of the following sections:
33.4.1 Selecting a Single Content Item

To select a specific item (including a Site Studio contributor data file) to display in a Content Presenter display template or Site Studio region template (see Section 33.1.1, "Understanding Site Studio Integration"):

**Tip:** Oracle recommends that you use Content Presenter ADF templates (that use region definitions) to integrate Site Studio and WebCenter Portal rather than use Site Studio region templates. The region templates display the details of the contributor data file rather than the contributed content. For more information, see the "Creating Content Presenter Display Templates" chapter in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

1. In the Content Presenter Configuration dialog (see Section 33.3, "Displaying the Content Presenter Configuration Dialog"), click Select Content or the Content tab.

2. On the Content page, expand the Content Source list, and select Single Content Item (Figure 33–9).

**Figure 33–9 Selecting the Content Source: Single Content Item**

3. Click Browse to locate the content item.

**Note:** For information on creating new content, see Section 33.10, "Creating or Editing Site Studio Content in the Content Presenter Configuration Dialog."
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 33–10).

**Figure 33–10  Navigating to Other Content Repositories**

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 33–10).

**33.4.2 Selecting the Contents of a Folder**

To display the contents of a folder on a page (in the order stored in the folder) in a Content Presenter display template:

1. In the Content Presenter Configuration dialog (see Section 33.3, "Displaying the Content Presenter Configuration Dialog"), click Select Content or the Content tab.
2. On the **Content** page, expand the **Content Source** list, and select **Contents Under a Folder** (Figure 33–11).

![Figure 33–11 Selecting the Content Source: Contents Under a Folder](image)

3. Click **Browse** to locate a folder. To select the folder as the content source, click in the folder row, not on the folder name (clicking the folder name 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 33–10).

---

**Note:** If the content repository includes an invalid type configuration, then no content displays when you click **Browse**. Instead, an error message reports **Unable to retrieve content type information**.

---

### 33.4.3 Selecting Content Based on the Results of a Query

**Note:** To select content based on the results of a query against the connected Content Server repository, full-text search must be enabled in Content Server through OracleTextSearch, as described in the "Configuring OracleTextSearch for Content Server" section in *Installing and Configuring Oracle WebCenter Content*.

To enter query criteria to refine the selection of the content to display in a Content Presenter display template:

1. In the Content Presenter Configuration dialog (see Section 33.3, "Displaying the Content Presenter Configuration Dialog"), click **Select Content** or the **Content** tab.

2. On the **Content** page, expand the **Content Source** list, and select **Results of a Query** (Figure 33–12).
3. In the **Results of a Query** pane (Figure 33–13 and Figure 33–14), enter desired values in the fields that you want the query to retrieve, as described in Table 33–1.
Figure 33–14  Results of a Query Pane: Selected Content Type

Table 33–1  Specifying Query Criteria for Results of a Query

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>File Name</td>
<td>Enter the name of a file in the specified Repository that you want to display in the selected template. You can use * as a wild card character to retrieve multiple files; for example: *.jpg.</td>
</tr>
<tr>
<td>Keywords</td>
<td>Enter any value that might be present in the content of the documents. The value may be one or more words or phrases.</td>
</tr>
<tr>
<td>Content Type</td>
<td>Select All Content Types to retrieve content items regardless of the content type, or select the name of a content type profile or Site Studio region template definition (see Section 33.1.1, &quot;Understanding Site Studio Integration&quot;) defined in Content Server. A content type profile specifies properties that define a specific type of content (for example, a press release, or a news flash, or an image). The content type IDC:GlobalProfile is the name of a default content type profile defined in Content Server that can be applied if no other content type profiles are defined.</td>
</tr>
<tr>
<td>Limit Results</td>
<td>Specify the maximum number of content items to be returned by the query. The default is 100.</td>
</tr>
</tbody>
</table>
33.4.4 Selecting a List of Content Items

Content Presenter allows you to create a list of multiple content items. The order you use when creating the list is the order in which they are presented at runtime.

To browse or search for any number of items to add to a list, and delete or reorder the items before adding the list to a page in a Content Presenter display template:

1. In the Content Presenter Configuration dialog (see Section 33.3, "Displaying the Content Presenter Configuration Dialog"), click Select Content or the Content tab.

2. On the Content page, expand the Content Source list, and select List of Items (Figure 33–15).

![Figure 33–15 Selecting the Content Source: List of Items](image)

3. In the Select Items to Display pane (Figure 33–16), click Add to browse or search for any number of items to add to a list.
4. In the Select One or More Content Items dialog, select multiple content items using Ctrl+click or Shift+click.

**Note:** Content Server exposes a content item in the **Browse** list only after it has a revision status of Released. The revision status of a new content item changes from Done to Released after it has reached its specified release date (specified by the `dInDate` property). Content items that do not have Released status will not appear in the **Browse** list. You can find the status of a content item in Content Server on the Content Information Page, as described in the "Revision Status" section 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 33–10).

**Note:** If the content repository includes an invalid type configuration, then no content displays when you click **Browse**. Instead, an error message reports **Unable to retrieve content type information**.

### 33.4.5 Selecting Content Based on the Results of a Scenario

If WebCenter Portal is configured to run Personalization Conductor scenarios using Content Presenter, you can select content based on the results of a WebCenter PersonalizationConductor scenario. For more information, see the "Managing Personalization" chapter in *Administering Oracle WebCenter Portal*, specifically the "Configuring the WebCenter OPSS Trust Service" and "Configuring Content Presenter" sections.

To enter Personalization Conductor scenario criteria to refine the selection of the content to display in a Content Presenter display template:

1. In the Content Presenter Configuration dialog (see Section 33.3, "Displaying the Content Presenter Configuration Dialog"), click **Select Content** or the **Content** tab.

2. On the **Content** page, expand the **Content Source** list, and select **Results of a Scenario** (Figure 33–17).
3. In the **Results of a Scenario** pane, review the list of scenarios that have been tagged for Content Presenter consumption, select those for which you want to generate results, and enter required parameters (Figure 33–18).

4. Click **Preview Results** to see the results of the selected scenarios.

---

**Note:** If the content repository includes an invalid type configuration, then no content displays when you click **Preview Results**. Instead, an error message reports **Unable to retrieve content type information**.

Any results that are returned from a scenario for use by Content Presenter must return a valid CMIS query, as Content Presenter takes the return value and runs it (as a CMIS query) against the repository specified within the Conductor URL. Your WebCenter Portal developer must format the scenario as described in the "Using the CMIS Provider" section in *Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper*.

### 33.5 Selecting a Display Template

The display template for the content you have selected on the **Content** page of the Content Presenter Configuration dialog may be one of the out-of-the-box templates provided with WebCenter Portal (see Table 33–2 and Table 33–3), a custom template designed for your organization in JDeveloper, or a Site Studio region template (see Section 33.1.1, "Understanding Site Studio Integration").
Tip: Oracle recommends that you use Content Presenter ADF templates (that use region definitions) to integrate Site Studio and WebCenter Portal rather than use Site Studio region templates. The region templates display the details of the contributor data file rather than the contributed content. For more information, see the “Creating Content Presenter Display Templates” chapter in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

For information about creating custom display templates in JDeveloper, and uploading them for use by WebCenter Portal, see the “Creating Custom Content Presenter Display Templates” section in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper. For information about creating and using Site Studio region templates, refer to the Oracle WebCenter Content documentation library (http://docs.oracle.com/cd/E28280_01/webcontent.htm).

By default, WebCenter Portal selects an appropriate display template based on the type of content selected. You can change the default template as required.

The system administrator can show, hide, and manage the custom display templates on the Assets page of the application administration settings. For more information, see Chapter 23, “Working with Resource Catalogs.”

To change the display template for the selected content:

1. In the Content Presenter Configuration dialog (see Section 33.3, "Displaying the Content Presenter Configuration Dialog"), click Select Template or the Template tab.

   The templates that are available for selection in the Template list are those that are identified by Content Presenter as suitable for displaying the selected content item(s). For more information, see the "Identifying Display Templates for Selected Content Items" section in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

2. On the Template page:
   
   ■ If the Content Source selected on the Content page is a Site Studio contributor data file or any other single content item, select a Content Presenter display template or a Site Studio region template from the Template list.

   The list of available Site Studio region templates includes only the templates that match the region definition of the Site Studio contributor data file selected on the Content page. To identify the Site Studio region templates, hover your mouse pointer over the templates in the list to display hint text identifying the Site Studio region templates. For more information, see Section 33.1.1, "Understanding Site Studio Integration."

Note: If you create a Site Studio contributor data file directly from the Content Presenter Configuration dialog, as described in Section 33.10, "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.
The Content Presenter display templates in the list include the out-of-the-box templates for single content items (see Table 33–2). Other selections that might be available in the list are custom display templates that have been uploaded to WebCenter Portal (see Section 20.5.8, “Uploading an Asset”). Custom Content Presenter display templates are created in JDeveloper, as described in the “Creating Content Presenter Display Templates” section in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

Figure 33–19 shows the Template list, with a Site Studio region template named Full Article View selected.

If the Content Source selected on the Content page is a multiple content item source (Contents Under a Folder, Results of a Query, or List of Items), select the desired Template Category (Figure 33–20), then the Template (Figure 33–21).
By default, there are two categories: Default Templates and Site Studio Templates. This selection defines the collection of out-of-the-box templates available for multiple content items (see Table 33–3).

Other selections that might be available in the list are custom display templates that have been uploaded to WebCenter Portal (see Section 20.5.8, "Uploading an Asset"). Custom Content Presenter display templates are created in JDeveloper, as described in the "Creating Content Presenter Display Templates" section in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

### Table 33–2 Out-of-the-Box Templates for Displaying Single Content Items

<table>
<thead>
<tr>
<th>Single Content Item Templates</th>
<th>View ID</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Default Document Details View</td>
<td>oracle.webcenter.content.templates.default.document.details</td>
<td>Displays detailed information about any single content item including creation date, modification date, created by username, modified by username, path, and any comments.</td>
</tr>
<tr>
<td>Default List Item View</td>
<td>oracle.webcenter.content.templates.default.list.item</td>
<td>Displays a single line with an icon and item name as a link that either displays or downloads the item when clicked.</td>
</tr>
<tr>
<td>Default View (default when no template is selected)</td>
<td>oracle.webcenter.content.templates.default.detail</td>
<td>Displays any single content item, either directly in the browser (images, HTML, text) or as a link that downloads the associated file when clicked. For example, when the selected document type is .doc, the Default View template is assigned to be the Default Document Details View template.</td>
</tr>
<tr>
<td>Full Article View</td>
<td>oracle.webcenter.content.templates.sitestudio.fullarticle</td>
<td>Displays a full article, including the Title, Image, and Body of an article. This template requires Site Studio to be enabled on the Content Server, as it uses the RD_ARTICLE Site Studio region definition.</td>
</tr>
</tbody>
</table>
33.6 Previewing the Results

To see a preview of your selected content before adding it to the page:

- Click Preview or the Preview tab.

The appearance of the content on the Preview page is dependent on whether the selected display template uses a stretch or flow layout. While the final view of the task flow can be configured to use either a stretch layout or a flow layout, the Preview page only uses a flow layout. As a result, the preview of content using templates that were designed for a stretch layout displays unstretched at a fixed default size. This is the normal behavior of stretchable content when displayed in non-stretching flow layout. To allow stretchable content to stretch to its full size and fill the task flow space entirely, click the Edit icon for the task flow to display the Component Properties dialog, and select the Stretch Content property (on the Display Options tab). For more information, see Section 14.3.4, “Working with Component Display Options.”

### Table 33–3: Out-of-the-Box Templates for Displaying Multiple Content Items

<table>
<thead>
<tr>
<th>Multiple Content Item Templates</th>
<th>View ID</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accordion View</td>
<td>oracle.webcenter.content.templates.default.list.panelaccordion</td>
<td>Displays multiple content items in an accordion format, where each item can be expanded to display its details.</td>
</tr>
<tr>
<td>Articles View (under the Site Studio Template category)</td>
<td>oracle.webcenter.content.templates.sitestudio.article</td>
<td>Displays the summaries of multiple articles, including the Title, Image, and Summary of articles. This template requires Site Studio to be enabled on the Content Server, as it uses the RD_ARTICLE Site Studio region definition.</td>
</tr>
<tr>
<td>Bulleted View</td>
<td>oracle.webcenter.content.templates.default.list.bulleted</td>
<td>Displays multiple content items in a bulleted list format. Only content items display; folder items are omitted.</td>
</tr>
<tr>
<td>Bulleted with Folder Label View</td>
<td>oracle.webcenter.content.templates.default.list.bulleted.label</td>
<td>Displays multiple content items in a bulleted list format. The name of the folder containing the first item in the list displays as a label above the list. This template is intended to be used with Content Source set to Contents Under a Folder to ensure that all items have the same parent folder. Only content items display; folder items are omitted.</td>
</tr>
<tr>
<td>Carousel View</td>
<td>oracle.webcenter.content.templates.default.list.carousel</td>
<td>Displays multiple content items in a carousel format, where items can be browsed by moving a slider left or right.</td>
</tr>
<tr>
<td>Icon View</td>
<td>oracle.webcenter.content.templates.default.list.tile</td>
<td>Displays multiple content items in a tiled format with large icons and file names.</td>
</tr>
<tr>
<td>List View (default when no template is selected)</td>
<td>oracle.webcenter.content.templates.default.list.simple</td>
<td>Displays multiple content items in a simple list.</td>
</tr>
<tr>
<td>List with Details Panel View</td>
<td>oracle.webcenter.content.templates.default.list.details.panel</td>
<td>Displays multiple content items in a list on the left, with a panel to the right displaying the details of a selected item.</td>
</tr>
<tr>
<td>Sortable Table View</td>
<td>oracle.webcenter.content.templates.default.list.tabular</td>
<td>Displays multiple content items in a sortable table that includes the document name, date created, and date modified.</td>
</tr>
<tr>
<td>Tabbed View</td>
<td>oracle.webcenter.content.templates.default.list.panel.tabbed</td>
<td>Displays multiple content items as tabs that can be selected to display item details.</td>
</tr>
</tbody>
</table>
From the Preview tab, you can click Edit Web Content (Figure 33–22) to edit HTML and Site Studio files in-context, as described in Section 33.11, "Creating and Editing Files In-Context in a Content Presenter Task Flow."

If the file is in workflow, you will see a workflow notification area at the top, as described in Section 33.12, "Approving and Rejecting Files in Workflow."

Figure 33–22  Previewing an Oracle Site Studio Contributor Data File

### 33.7 Using Responsive Templates

The Articles View and Full Article View templates use responsive layouts to display their content. The Articles View template can be used to list articles, providing links to a page displaying the full details of an article. The full details of the article are displayed using the Full Article View template.

The following sections describe how to use responsive templates:

- Section 33.7.1, "Prerequisites"
- Section 33.7.2, "About the Articles View Template"
- Section 33.7.3, "Using the Articles View Template"
- Section 33.7.4, "About the Full Article View Template"
- Section 33.7.5, "Using the Full Article View Template"
- Section 33.7.6, "Optimizing Display on Mobile Devices"
33.7.1 Prerequisites

The Articles View or Full Article View template rely on the Site Studio RD_ARTICLE region definition, so Site Studio must be enabled in Content Server and seed the RD_ARTICLE region definition:

1. Enable Site Studio (see Section 33.1.1, "Understanding Site Studio Integration").
2. Start (or restart) WebCenter Portal after Site Studio has been enabled (this will seed the RD_ARTICLE region definition).

33.7.2 About the Articles View Template

The Articles View template includes different layouts based on the width of the browser. The font sizes and image sizes also vary 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 33–23).

Figure 33–23  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 33–24).
If the browser is wide (over 780 pixels), then the template lists the articles in three columns (Figure 33–25).
33.7.3 Using the Articles View Template

To use the Articles View template:

1. Add the Content Presenter task flow to a page (see Section 33.2, "Adding a Content Presenter Task Flow to a Page").

2. Select the content (see Section 33.4, "Selecting Content"). The content should be either Results of a Query or List of Items. If the content is Results of a Query, then you need to set the Content Type to WCM:RD:RD_ARTICLE, which restricts the query to just content created using the RD_ARTICLE region definition.

3. Select the display template (see Section 33.5, "Selecting a Display Template"). Set the Template Category to Site Studio Templates and the Template to Articles View.

**Note:** To create content for the Articles View template, see Section 33.10, "Creating or Editing Site Studio Content in the Content Presenter Configuration Dialog."

33.7.4 About the Full Article View Template

The Full Article View template includes different layouts based on the width of the browser.

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 33–26).
If the browser is wider (over 480 pixels), then the template displays an article with the image displayed to the right (Figure 33–27).
33.7.5 Using the Full Article View Template

To use the Full Article View template:

1. Add the Content Presenter task flow to a page (see Section 33.2, "Adding a Content Presenter Task Flow to a Page").

2. Select the content (see Section 33.4, "Selecting Content"). The content should be Single Content Item. Then either click Browse and select an existing item (this must be an item created using the RD_ARTICLE region definition), or click Create Web Content to create a new item (see Section 33.10, "Creating or Editing Site Studio Content in the Content Presenter Configuration Dialog") using the RD_ARTICLE region definition.

3. Select the display template (see Section 33.5, "Selecting a Display Template"). Set the Template Category to Site Studio Templates and the Template to Full Article View.

33.7.6 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 (see Section 9.3.1, "Editing a Device Group"). 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 (see Section 7.5.1, "Accessing Assets Administration for a Portal").
2. Click Page Templates.
3. Select the page template (note that you can't 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:
   
   ```xml
   <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:

   ```html
   <meta name="viewport" content="width=device-width, initial-scale=1.0"/>
   ```

7. Click Save and Close.

### 33.8 Adding Links from Content to Navigation Nodes

When you expose content stored in a Content Presenter task flow, consider whether you want to add one or more links from the content to a node in the default navigation model (see Section 13.16, "Setting Navigation Properties and Display Options for a Page").

When the content displays in Content Presenter at runtime, an end user can click the links to navigate to the desired 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 default navigation model from a content item:

1. Edit the content item, as described in:
   - Section 33.10, "Creating or Editing Site Studio Content in the Content Presenter Configuration Dialog"
   - Section 33.11, "Creating and Editing Files In-Context in a Content Presenter Task Flow"
2. Add a link using the following syntax:
   ```html
   <a target="" href="$wcUrl('externalId')">New Customers</a>
   ```

   where externalId is the value of the External ID property of the navigation node to link to (see Table 13-3, "Page Navigation Item Settings: Options Pane").

   For example:

   ```html
   <a target="" href="$wcUrl('NEWCUSTOMERSLINK')">New Customers</a>
   ```
33.9 Authoring Site Studio Content to Optimize Presentation in Content Presenter

Content Presenter integrates with Oracle Site Studio to allow you to create, access, edit, and display Site Studio contributor data files in either a custom Content Presenter display template or a Site Studio region template. For more information, see Section 33.1.1, "Understanding Site Studio Integration."

Tip: Oracle recommends that you use Content Presenter ADF templates (that use region definitions) to integrate Site Studio and WebCenter Portal rather than use Site Studio region templates. The region templates display the details of the contributor data file rather than the contributed content. For more information, see the "Creating Content Presenter Display Templates" chapter in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

To optimize the presentation of Oracle Site Studio content in Content Presenter, follow the guidelines provided in the following sections:

- Section 33.9.1, "Best Practices for Images"
- Section 33.9.2, "Best Practices for Defining Styles"
- Section 33.9.3, "Best Practices for JavaScript"

33.9.1 Best Practices for Images

Keep the following guidelines in mind as you work with images in Site Studio that will be displayed using Content Presenter:

- Store images in Content Server in a common location.
- Insert images into WYSIWYG elements using the Site Studio Contributor image wizard.
- Set the image tag src attribute to a relative link to an image file in Content Server. This attribute is rewritten by Content Presenter during rendering to use the GET_FILE service.
- For performance improvement, use web proxy to cache artifacts at URLs from Content Server, and set expiration based on tolerance for updates in Content Server.

Example for Apache mod_cache:

- CacheEnable mem /cs
- CacheDefaultExpire 3600 (one hour)

33.9.2 Best Practices for Defining Styles

Keep the following guidelines in mind as you work with style definitions for Site Studio contributor data files that will be displayed using Content Presenter:

- Define styles in CSS files.
- Store CSS files either in Content Server or in 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)

33.9.3 Best Practices for JavaScript

Keep the following guidelines in mind as you work with JavaScript in Site Studio contributor data files that will be displayed using Content Presenter:

- Recommended: Do not use JavaScript within web content that is rendered within 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)

33.10 Creating or Editing Site Studio Content in the Content Presenter Configuration Dialog

Content Presenter integrates with Oracle Site Studio to allow you to create, access, edit, and display Site Studio contributor data files in either a custom Content Presenter display template or a Site Studio region template. For more information, see Section 33.1.1, "Understanding Site Studio Integration."
Creating or Editing Site Studio Content in the Content Presenter Configuration Dialog

**Note:** To create or edit Oracle Site Studio content in a seamless interface within WebCenter Portal, both of the following two requirements must be met:

- You must access WebCenter Portal through Oracle HTTP Server (OHS) to expose Content Server and WebCenter Portal under the same host and port. For information about setting up OHS as the front end to WebCenter Portal, see the "Content Server - Configuration" section 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 the "Registering Content Repositories" section in *Administering Oracle WebCenter Portal*. To set webContextRoot through WLST, see the "createJCRContentServerConnection" and "setJCRContentServerConnection" sections in the *WebLogic Scripting Tool Command Reference*.

Without this configuration, it is still possible to create or edit Site Studio content from within Content Presenter, but the create and edit actions launch new browser windows (or tabs) rather than opening within the Content Presenter task flow.

Oracle recommends that you use Content Presenter ADF templates (that use region definitions) to integrate Site Studio and WebCenter Portal rather than use Site Studio region templates. The region templates display the details of the contributor data file rather than the contributed content. For more information, see the "Creating Content Presenter Display Templates" chapter in *Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper*.

To create or edit Oracle Site Studio content from the Content Presenter Configuration dialog:

1. In the Content Presenter Configuration dialog (see Section 33.3, "Displaying the Content Presenter Configuration Dialog"), click Select Content or the Content tab.

2. On the Content page, click Create Web Content (Figure 33–28).

*Figure 33–28  Selecting the Content Source: Site Studio*

The Oracle Site Studio Choose Region Content pane opens (Figure 33–29).
3. In the **Choose Region Content** pane, select a Site Studio region definition on which the content you want to create or edit is based.

**Notes:**
- 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 `RD_ARTICLE` Region Definition. For more information, see Section 33.7, "Using Responsive Templates."

4. Click Next.

The **Choose content file** pane opens (Figure 33–30).
5. In the Choose content file pane, select one of the following:

   - **New Contributor data file** to open the Check-in content pane (Figure 33–31), where you can specify the standard document properties for the new Site Studio contributor data file that you want to check in to Content Server.

   - **Existing file from server** to open Content Server (Figure 33–32), showing Site Studio contributor data files that are based on the selected region definition.
6. Make note of the file name, then click Next.

   The Check-in Confirmation pane opens (Figure 33–33).

   **Figure 33–33  Adding Site Studio Content: Check-in Confirmation**

   ![Check-in Confirmation](image)

   The content item "STAMILBURUSORACL173604" was successfully checked in.

   - Edit content item now
   - Exit without editing

7. In the Check-in Confirmation pane, select one of the following:

   - **Edit content item now** to open the Site Studio Contributor editor, where you can edit the content item as described in Section 33.11.2, "Editing Site Studio Files In-Context" (beginning with Step 4).

   - **Exit without editing** to make no changes to the file.

8. Click Finish to return to the Content Presenter Configuration dialog.
If you access WebCenter Portal through Oracle HTTP Server (OHS) and have configured the `webContextRoot` parameter, as described in the note at the top of this section, the Site Studio contributor data file you selected is shown auto-selected in the Content Presenter Configuration dialog.

If OHS and the `webContextRoot` parameter are not configured, you can now select the Site Studio contributor data file to display in the Content Presenter task flow: on the Content page, browse to the Site Studio file, select it, and click Select.

9. In the Content Presenter Configuration dialog, click Save.

### 33.11 Creating and Editing Files In-Context in a Content Presenter Task Flow

*In-context editing* refers to editing content directly in WebCenter Portal at runtime, where the editor opens in a separate window.

With appropriate permissions, end users can edit HTML and Site Studio content in-context in a Content Presenter task flow:

---

**Note:** Users must have permissions to view and edit the page containing the Content Presenter instance, as well as being assigned a role with write permissions on Content Server. For more information, see Section 7.7, “Administering Security in a Portal” and the “Managing Oracle WebCenter Portal Security” chapter in Administering Oracle WebCenter Portal.

---

The following sections describe how to perform in-context editing:

- Section 33.11.1, "Editing Wiki Documents or HTML Files In-Context"
- Section 33.11.2, "Editing Site Studio Files In-Context"
- Section 33.11.3, "Creating New Site Studio Content In-Context"
- Section 33.11.4, "Changing the Edit Mode Key Sequence"

#### 33.11.1 Editing Wiki Documents or HTML Files In-Context

With appropriate permissions, end users can edit wiki documents or HTML files in-context in a Content Presenter task flow.

To edit a wiki or HTML file in a Content Presenter task flow:

1. In the Content Presenter task flow, click anywhere in the file content.
2. Press Ctrl+Shift+C to enter the in-context edit mode. The editable areas of the web page are highlighted with a dashed border.

---

**Note:** You can change the key sequence to enter in-context edit mode if you wish. See Section 33.11.4, "Changing the Edit Mode Key Sequence.”

---

3. Click the Edit icon in the upper right corner of the document chrome (Figure 33–34) to open the file in the Document Viewer preview pane.
Creating and Editing Files In-Context in a Content Presenter Task Flow

Publishing Content Using Content Presenter

If the file is in workflow, workflow controls also display (Figure 33–35). For more information, see Section 36, "Working with Workflow-Enabled Content."

4. In the Document Viewer preview pane, click Edit (Figure 33–36) to automatically check the file out and open it for editing in the Rich Text Editor (RTE).

See Also: The "Using the Rich Text Editor (RTE)" section in Using Oracle WebCenter Portal

5. Make required updates, then save and close the file.

The modified file is automatically checked in.

6. In the Content Presenter task flow, press Ctrl+Shift+C again to exit the in-context editing mode.

33.11.2 Editing Site Studio Files In-Context

Content Presenter integrates with Oracle Site Studio to allow you to create, access, edit, and display Site Studio contributor data files in either a custom Content Presenter
Creating and Editing Files In-Context in a Content Presenter Task Flow

display template or a Site Studio region template. For more information, see Section 33.1.1, "Understanding Site Studio Integration."

With appropriate permissions, end users can edit Site Studio contributor data files in-context in a Content Presenter task flow.

To edit a Site Studio file in a Content Presenter task flow:

1. In the Content Presenter task flow, click anywhere in the Site Studio file content.
2. Press Ctrl+Shift+C to enter the in-context edit mode. The editable areas of the web page are highlighted with a dashed border.

   **Note:** You can change the key sequence to enter in-context edit mode if you wish. See Section 33.11.4, "Changing the Edit Mode Key Sequence."

3. Click the Edit icon in the upper right corner of the document chrome (Figure 33–37) to open the file in Site Studio Contributor

**Figure 33–37 In-Context Edit Mode for a Site Studio File in a Content Presenter Task Flow**

4. In the Site Studio Contributor Data File editor, click a region to edit, as shown in Figure 33–38.

   For information about editing files in Site Studio Contributor, see the Oracle Site Studio documentation.
5. Click **Save and Close** to exit the Site Studio Contributor editor and return to the portal.

6. In the Content Presenter task flow, press Ctrl+Shift+C again to exit the in-context editing mode.

### 33.11.3 Creating New Site Studio Content In-Context

Content Presenter integrates with Oracle Site Studio to allow you to create, access, edit, and display Site Studio contributor data files in either a custom Content Presenter display template or a Site Studio region template. For more information, see Section 33.1.1, "Understanding Site Studio Integration."

**Tip:** Oracle recommends that you use Content Presenter ADF templates (that use region definitions) to integrate Site Studio and WebCenter Portal rather than use Site Studio region templates. The region templates display the *details of the contributor data file* rather than the *contributed content*. For more information, see the "Creating Content Presenter Display Templates" chapter in *Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper*. 

---

**Figure 33–38  Editing a File in Site Studio Contributor**

![Image of Site Studio Contributor interface]

- **Data File - INTHEKNOW0001**
- **LogoImage**
- **Title**
  Oracle JAPAC Public Relations Wins Top Public Relations Honor for Social Media Adoption
- **SubTitle**
  The Institute of Public Relations of Singapore (IPRS) presented the Oracle JAPAC Public Relations (PR) team with the 2010 PRISM Award (Public Relations In the Service of Mankind) for social media adoption.

Click here to edit this Element.
With appropriate permissions, end users can create new web content in Site Studio during in-context editing in a Content Presenter task flow.

In-context creation of Site Studio files is slightly different than creating Site Studio files in the Content Presenter Configuration dialog, as described in Section 33.10, "Creating or Editing Site Studio Content in the Content Presenter Configuration Dialog." When creating a new Site Studio file in-context, you are limited to creating content that is of the same region definition, file location, security group, and document type as the content selected in the Content Presenter task flow. Additionally, the region definition must have been previously created in the Site Studio application.

To create a new Site Studio file in a Content Presenter task flow:

1. In the Content Presenter task flow, click anywhere in the currently displayed Site Studio file.

2. Press Ctrl+Shift+C to enter the in-context edit mode. The editable areas of the web page are highlighted with a dashed border.
   
   Note that you can change the key sequence to enter in-context edit mode if you wish. See Section 33.11.4, "Changing the Edit Mode Key Sequence."

3. Click the Create icon in the upper right corner of the document chrome (Figure 33–39).

4. In the Choose Content window, select New Contributor data file, then click Next (Figure 33–40).

5. Fill out the Check-in Content form. This form provides the metadata for the contributor data file and checks the file into Content Server. The file is empty until you (or another contributor) edits it. For more information on filling out this form,
see the "Uploading and Checking In Documents" section in Using Oracle WebCenter Content.

6. In the Check-in Confirmation window, select **Edit content item now**.

7. Click **Finish**.

   The Site Studio Contributor Data File editor opens ([Figure 33–41](#)).

**Figure 33–41  Site Studio Contributor File Editor**

8. Edit the file, then click **Save and Close**.

### 33.11.4 Changing the Edit Mode Key Sequence

To change the edit mode key sequence used to enter in-content editing mode for a Site Studio file in Content Presenter, edit the `<key-sequence>` entry in the application's `adf-config.xml` file:

```
<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>
```

### 33.12 Approving and Rejecting Files in Workflow

You can view content items displayed in Content Presenter while they are in a workflow, including Site Studio contributor data files displayed in a Site Studio region template.
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 33–42) or in-context edit (contributor) mode, and also provides links to approve or reject the item in workflow, and view additional details about the item (including workflow name, steps performed, action performed, date of action, and who performed the action).

For more information about working with files in workflow in Content Presenter, see Section 36.3.2, "Viewing Workflow Files in a Content Presenter Task Flow."

### 33.13 Setting Content Presenter Task Flow Properties

The Content Presenter task flow has associated properties, which users with sufficient privileges can access through the Component Properties dialog in Composer (Figure 33–43).
For information about accessing the Component Properties dialog, see Section 14.3.2, "Setting Properties on a Component."

The following sections provide information about properties of the Content Presenter task flow and describe the properties on the Parameters tab:

- Section 33.13.1, "About the Content Presenter Task Flow Properties"
- Section 33.13.2, "Content Presenter Task Flow Parameters"

### 33.13.1 About the Content Presenter Task Flow Properties

**Note:** The Content Presenter properties are intended for use at design time by developers creating a WebCenter Portal Framework application (see the "Adding Content Task Flows and Document Components to a Portal Page" section in *Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper*), or for advanced users who want to bind a parameter to an EL expression. If you modify a property value in the Component Properties dialog, the new value overrides the value specified in the Content Presenter Configuration dialog, and that value becomes read-only in the Content Presenter Configuration dialog (Figure 33–44).
The properties on the **Parameters** tab of the Component Properties dialog control the default task flow content. For descriptions of the parameters on this tab, see Section 33.13.2, "Content Presenter Task Flow Parameters." For some task flows, parameters on this tab facilitate the wiring of the task flow to page parameters and page definition variables. For more information, see "Chapter 19, "Wiring Pages, Task Flows, Portlets, and ADF Components."

Changes to the properties on the **Display Options**, **Style**, and **Content Style** tabs affect the appearance and behavior of the task flow for all users. These properties are common to all task flows. For more information, see Section 14.3.4, "Working with Component Display Options" and Section 14.3.6, "Working with Style and Content Style Properties."

The contents of the **Events** tab depend on the events supported by the task flow. For more information, see Section 14.3.7, "Working with Component Contextual Events."

All properties on the **Parameters** and **Display Options** tabs provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the **Edit** icon next to a property field to open the editor. If you need EL assistance, an application developer can provide an EL expression; see the "Expression Language Expressions" appendix in *Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper*.

### 33.13.2 Content Presenter Task Flow Parameters

*Table 33–4* describes the parameters that are unique to the Content Presenter task flow.
Table 33-4  Content Presenter Task Flow Parameters

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data Source</td>
<td>The data source of the content. The value depends on the value of Data Source Type:</td>
</tr>
</tbody>
</table>
|           | ■ When Data Source Type=Single Node, set Data Source to a single node identifier in the format:  
|           | connection_name#dDocName:content_id  
|           | For example: myconnection.myco.com#dDocName:STAN_IDC-007619  
|           | ■ When Data Source Type=Folder Contents, set Data Source to a single node identifier in the format:  
|           | connection_name#dCollectionID:collection_id  
|           | For example: myconnection.myco.com#dCollectionID:45535  
|           | ■ When Data Source Type=Query Expression, set Data Source to a CMIS (Content Management Interoperability Services) query expression.  
| Notes:    | ■ Using a CMIS query as the Data Source requires a valid Task Flow Instance ID.  
|           | Examples:  
|           | select * from cmis:document where cmis:name like 'test%'  
|           | connectionName=connection_name#select * from cmis:document where cmis:createdBy = 'weblogic'  
|           | ■ If connectionName is not specified, then the primary connection will be used.  
|           | For more information about how to format the query and examples, see the "Content Management REST API" chapter in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.  
|           | ■ When Data Source Type=Multi Node, set Data Source to a set of comma-delimited node identifiers in the format:  
|           | connection_name#dDocName:content_id, connection_name#dDocName:content_id,...  
|           | For example: myconn#dDocName:DOCUMENT_ID_12345, myconn#dDocName:DOCUMENT_ID_56789 |
When Data Source Type=Scenario Results, set Data Source to the results from a scenario in the format:

```
conductor-connection-name=conductor_conn_name,namespace=scenario_namespace,scenario-name=scenario_name,inputparm1=value1,inputparm2=value2, ...
```

For example:

```
conductor-connection-name=ConductorServiceLocal,namespace=CPNamespace,scenario-name=GetRelatedDocsScenario/topic=outdoors,interests=hiking
```

For information about the Personalization Conductor and scenarios, see the "Personalizing Oracle WebCenter Portal Applications" chapter in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

where:

- **connection_name** = the name of the content repository connection.
- **content_id** = the Content ID for the content specified on the content information page for the item in Content Server, or the CollectionID value on the content server.
- **collection_id** = the CollectionID found in the URL for the folder information page in Content Server.
- **conductor_connection_name** = the name of the URL connection that points to the Personalization Conductor (this name must start with Conductor). This value must match the Reference name attribute value in the connections.xml file for this URL connection. For more information, see the "Configuring Content Presenter" section in Administering Oracle WebCenter Portal and the "WebCenter Portal Files" appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.
- **namespace** = the name of the namespace that contains the specified scenario.
- **scenario_name** = the name of the scenario that Content Presenter will be using.

### Data Source Type

The data source type of the content. Corresponds to the **Content Source** value in the Content Presenter Configuration dialog. Valid values are:

- **Single Node**: A single content item.
- **Folder Contents**: The contents of a folder.
- **Query Expression**: The results of a query.
- **Multi Node**: An ordered list of content items.
- **Scenario Results**: The results of the specified scenario created using the Scenario Editor in JDeveloper. See the "Personalizing WebCenter Portal Applications" chapter in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

### Maximum Results

The maximum number of results to display when Data Source Type is Query Expression.

Default: 100
Table 33–4  (Cont.) Content Presenter Task Flow Parameters

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Region Template</td>
<td>Specifies whether the display template is a Site Studio region definition template. This value is valid only with Content Server 11g or higher:</td>
</tr>
<tr>
<td></td>
<td>- ${true}$: Display template is a Site Studio region definition template. The TemplateView ID value is set to the Content ID of the region template.</td>
</tr>
<tr>
<td></td>
<td>- ${false}$ (default): Display template is not a Site Studio region definition template.</td>
</tr>
<tr>
<td></td>
<td>For information about creating and using Site Studio region templates, see &quot;Understanding Site Studio Integration&quot; and the Oracle WebCenter Content documentation library (<a href="http://docs.oracle.com/cd/E28280_01/webcontent.htm">http://docs.oracle.com/cd/E28280_01/webcontent.htm</a>).</td>
</tr>
<tr>
<td>Task Flow Instance ID</td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td><strong>Note</strong>: Using a CMIS query as the Data Source requires a valid Task Flow Instance ID.</td>
</tr>
<tr>
<td>Template Category ID</td>
<td>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 33–3) or a custom category created for a display template for multiple content items (see the &quot;Creating Content Presenter Display Templates&quot; chapter in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper).</td>
</tr>
<tr>
<td>Template View ID</td>
<td>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 33–2), a custom display template (see the &quot;Creating Content Presenter Display Templates&quot; chapter in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper), or set to the contentID of a region template if the content is a region.</td>
</tr>
</tbody>
</table>
This chapter describes how to enable document functionality to allow WebCenter Portal users to work with files, folders, and other document components (such as links, inline frames, and images) in WebCenter Portal, and how to add and manage document task flows.

After an application specialist or portal moderator has provided access to content by adding task flows or components to a page, end users can create and edit content at runtime, collaborate on documents, integrate with Microsoft Office and Windows Explorer, and add wikis and blogs to a portal. These tasks for end users are described in the “Working with Documents,” “Working with Wikis,” and “Working with Blogs” chapters in Using Oracle WebCenter Portal.

This chapter includes the following topics:

- Section 34.1, "About the Document Task Flows"
- Section 34.2, "About Document Components"
- Section 34.3, "Adding a Selected Folder or File to a Page"
- Section 34.4, "Adding a Document Task Flow to a Page"
- Section 34.5, "Understanding the Document Task Flows Menus and Actions"
- Section 34.6, "Troubleshooting Documents Tool Issues"

Permissions: To perform the tasks in this chapter, you need the following portal-level permissions:

- Basic Services: Edit Page Access and Structure (standard permissions) or Pages: Edit Pages (advanced permissions)
- Documents permissions (advanced permissions).

For more information about permissions, see Section 29.1, "About Roles and Permissions for a Portal."

34.1 About the Document Task Flows

The document task flows provide a variety of formats to display folders and files, including wikis and blogs, on a page in a portal. You can choose the task flows appropriate for your application to provide features for accessing, adding, and managing folders and files; configuring and viewing file and folder properties; and
searching file and folder content in Content Server, Oracle Portal, or SharePoint content repositories.

**Note:** The availability of SharePoint as a content repository requires the installation of the SharePoint adapter. Administration for SharePoint is performed using WLST commands, not Oracle Enterprise Manager Fusion Middleware Control Console.

In a portal, you can add document task flows to a page without necessarily enabling the Documents tool in the portal. If the Documents tool is *not* enabled in a portal, adding a document task flow to a page does not auto-populate the task flow with folders and files by default, unless you edit the default task flow properties.

When the Documents tool is enabled in the portal template on which a new portal is based, 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. For more information, see *Section 39.1, "About Tools and Services."

When the Documents tool is enabled in a portal (see *Section 39.2, "Enabling and Disabling Tools and Services Available to a Portal"*), the following content functionality is made available:

- Document task flows added to the portal are auto-populated by default with folder and file listings based on the default content repository connection.
- Documents added to the portal are stored in a folder whose security is managed by the portal.
- You can add a document task flow that displays only the documents belonging to the current portal (in the *Content Management* section of the resource catalog, select *Portal Documents*).

*Table 34–1* provides an overview of the document task flows, which offer different ways to display folder and file listings to add and manage content in the connected content repository, or to display individual files in a portal.

<table>
<thead>
<tr>
<th>Table 34–1 Document Task Flows</th>
<th>Folder and File Listings</th>
<th>Individual Folders</th>
<th>Individual Files</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Document Explorer task flow</strong></td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Displays folders and files in two panes, combining the functionality of the Document Navigator and Folder Viewer task flows. It provides in-place previewing and editing, and robust document management capabilities with an interface that should be familiar to users of Windows Explorer. Size: medium to full page width.</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Document List Viewer task flow</strong></td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Displays folders and files in a single pane as a flat listing. It provides preview and editing in separate window, and some management capabilities. Size: narrow to medium page width.</td>
<td>X</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
For more information about each document task flow, refer to the following sections:

- **Section 34.1.1**, "Understanding the Document Explorer Task Flow"
- **Section 34.1.2**, "Understanding the Document List Viewer Task Flow"
- **Section 34.1.3**, "Understanding the Document Manager Task Flow"
- **Section 34.1.4**, "Understanding the Document Navigator Task Flow"

### Table 34–1 (Cont.) Document Task Flows

<table>
<thead>
<tr>
<th>Document Task Flow</th>
<th>Folder and File Listings</th>
<th>Individual Folders</th>
<th>Individual Files</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Document Manager task flow.</strong></td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Displays folders and files as specified by its <strong>Layout</strong> property: <strong>Explorer</strong>, <strong>Table</strong>, or <strong>Tree Table</strong>. <strong>The Explorer layout is identical to the Document Explorer task flow, without the properties</strong> <strong>Show Documents</strong>, <strong>Show Folders</strong>, and <strong>Collapse Tree Navigation</strong>.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Document Navigator task flow.</strong></td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Displays a nested hierarchy of folders and files in a single pane, providing expand and collapse on folders to show the full hierarchy. Intended for use as a component of another Documents task flow (such as the Document Explorer task flow). Clicking folders and files in this task flow standalone performs no action. <strong>Size: narrow to medium page width.</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Folder Viewer task flow.</strong></td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Displays the contents of a folder in a single pane as a flat listing, providing in-place preview and editing, and robust document management capabilities with a straightforward interface that should be familiar to Windows users. <strong>Size: medium to full page width.</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Recent Documents task flow.</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Displays a list of the files most recently created or modified in the current folder. This task flow is available only when the connected content repository is <strong>Content Server</strong>.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Document Viewer task flow.</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Displays a preview of a file, or file properties for files that do not support a preview. A tabbed set of panes at the bottom of the task flow provide access to comments, tags, history, info (properties), and links.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Document Mini Properties task flow.</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Displays the Basic properties of a file in a read-only view.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Document Properties task flow.</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Displays both Basic and Advanced properties of a file, along with an <strong>Edit</strong> button to allow you to modify property values.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Document Version History task flow.</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Displays a list of versions of a file, allowing for deletion of a selected version.</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

1 To show folder information in a Document Viewer, Document Mini Properties, or Document Properties task flow, you must set the task flow’s **Item ID** or **Resource ID** property to the ID of the target folder. See Chapter 35, "Setting Document Task Flow and Document Component Properties."

For more information about each document task flow, refer to the following sections:
34.1.1 Understanding the Document Explorer Task Flow

The Document Explorer task flow displays a list of folders and files in two panes, combining the functionality of the Document Navigator and Folder Viewer task flows. The left pane shows folders in a nested hierarchy, and the right pane shows the contents of the currently selected folder (Figure 34–1). This task flow provides robust document management capabilities with an interface that should be familiar to users of Windows Explorer. The size of this task flow is medium to full page width.

![Figure 34–1  Document Explorer Task Flow](image)

This is the task flow used to display folders and files on the Documents page in a portal, as shown in Figure 34–2 (see Section 8.1, "About System Pages").

![Figure 34–2  Documents Page in a Portal](image)

**Note:** The Documents tool is exposed on the Documents page and administration settings in a portal only with Content Server 11g. If the connected content repository is Content Server 10g, the Documents page is not shown in a portal, and the Documents tool is not available in the portal administration settings (Services and Roles). To use the documents functionality in 10g, you can create a page in a portal and add document task flows to the page (see Section 34.4, "Adding a Document Task Flow to a Page").
If you see only a single pane (default), click the Restore Pane icon (.expand) at the left of the task flow to expose the left pane.

Conversely, click the Collapse Pane icon (contract) at the left of the task flow to hide the left pane.

The Document Explorer task flow is a feature-rich document task flow for viewing, managing, and collaborating on folders and files. In the Document Explorer task flow, you can:

- Click the expand and collapse icons for a folder to show and hide the subfolders.
- Click a folder in the left or right pane to display the contents of that folder in the right pane, and drill down further into subfolders.
- Click a file in the right pane to display a preview of the file contents in the Document Viewer preview pane, with file management options, including in-place editing for some file types. If the file type does not support a preview (for example, .mp3 music files, video files, or .zip files), the preview pane displays the file properties (see Section 34.1.7, "Understanding the Document Viewer Task Flow").
- Click in a row (not on the folder or file name) in the right pane to perform menu actions on the folder or file in that row (see Section 34.5, "Understanding the Document Task Flows Menus and Actions"). Alternatively, right-click a folder or file to display a context menu of available actions.
- Drag and drop folders and files in the task flow hierarchy to reorganize the file or folder structure.

To add a Document Explorer task flow to a page, refer to Section 34.4, "Adding a Document Task Flow to a Page." In the Default Portal Catalog, open Content Management, then click Add next to Document Explorer to display the default listing of folder and files in the root folder of the active content repository connection.

34.1.1.1 Changing the Document Explorer Task Flow Default Listing
You can change the default listing displayed in a Document Explorer task flow in either of the following ways:

- Selecting a Specific Folder in the Resource Catalog
- Modifying Properties

Selecting a Specific Folder in the Resource Catalog
To change the default listing displayed in a Document Explorer task flow by selecting a specific folder to display:

- Drill down to a target folder in the resource catalog, then click the corresponding Add link, and select Document Explorer (Figure 34–3). For more information, see Section 34.3, "Adding a Selected Folder or File to a Page."
## 34.1.2 Understanding the Document List Viewer Task Flow

The Document List Viewer task flow displays the contents of a folder in a single pane as a flat listing (Figure 34–5). In this task flow, you can navigate a folder hierarchy, and customize search queries. While this task flow may be useful for a specific need, its search functionality is replicated and enhanced by using the Content Presenter task flow instead. The size of this task flow is narrow to medium page width.
**Figure 34–5  Document List Viewer Task Flow (with Show Folders enabled)**

In the Document List Viewer task flow, you can:

- Click a **folder** to display the contents of that folder, and drill down further into subfolders.

- Click a **file** to display a preview of the file contents in a separate Document Viewer preview window, with file management options, including editing for some file types. If the file type does not support a preview (for example, `.mp3` music files, video files, or `.zip` files), the preview window displays the file properties. See Section 34.1.7, "Understanding the Document Viewer Task Flow."

- Click in a **row** to perform **View** menu actions on the folder or file in that row. **View** is the only menu available for this task flow.

To add a Document List Viewer task flow to a page, refer to Section 34.4, "Adding a Document Task Flow to a Page." In the Default Portal Catalog, open **Content Management**, then click **Add** next to **Document List Viewer**.

### 34.1.2.1 Changing the Document List Viewer Task Flow Default Listing

You can change the default listing displayed in a Document List Viewer task flow in any of the following ways:

- Selecting a Specific Folder in the Resource Catalog
- Modifying Properties
- Specifying Detailed Content Source Criteria

**Selecting a Specific Folder in the Resource Catalog**

To change the default listing displayed in a Document List Viewer task flow by selecting a specific folder to display:

- Drill down to a target folder in the resource catalog, then click the corresponding **Add** link, and select **Document List Viewer** (Figure 34–6). For more information, see Section 34.3, "Adding a Selected Folder or File to a Page."
Modifying Properties
To change the default listing displayed in a Document List Viewer task flow by modifying the task flow properties:

1. Edit the page, and click the properties Edit icon (the second wrench icon in the task flow chrome) (Figure 34–7) to open the Component Properties dialog.

2. To display folders as well as files, select the Show Folders parameter check box.

3. To change the target folder, set the Connection Name and Root Folder Path properties on the Parameters tab (see Table 35–2, "Document List Viewer Task Flow Parameters").

Specifying Detailed Content Source Criteria
To change the default listing displayed in a Document List Viewer task flow to list content that matches specified criteria:

1. In the task flow heading, click the configuration Edit icon (the first wrench icon in the task flow chrome) (Figure 34–8) to open the Document List Viewer Configuration dialog.

2. In the Document List Viewer Configuration dialog (Figure 34–9), select from the Content Source drop-down list:
Figure 34–9  Document List Viewer Configuration Dialog

- **Contents Under a Folder** (folders display in the task flow pane only when the Show Folders parameter is selected). Click the Browse icon, navigate to and select the folder with the content you want to initially display in the task flow, then click Save.

- **Results of a Query**. In the Results of a Query pane (Figure 34–10 and Figure 34–11), enter desired values in the fields that you want the query to retrieve, as described in Table 34–2.
Figure 34–10  Results of a Query Pane: All Content Types
**Figure 34–11  Results of a Query Pane: Selected Content Type**

![Figure 34–11  Results of a Query Pane: Selected Content Type](image)

**Table 34–2  Specifying Query Criteria for Results of a Query**

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>File Name</td>
<td>Enter the name of a file in the specified Repository that you want to display in the Document List Viewer task flow. You can use * as a wild card character to retrieve multiple files; for example: *.jpg.</td>
</tr>
<tr>
<td>Keywords</td>
<td>Enter any value that may be present in the content of the documents. The value may be one or more words or phrases. Keyword search requires full-text search to be configured in Content Server by enabling FullText Search Option, as described in the &quot;Configuring the Content Server Instance&quot; section in Installing and Configuring Oracle WebCenter Content.</td>
</tr>
<tr>
<td>Content Type</td>
<td>Select All Content Types to retrieve content items regardless of the content type. Or, select the name of a content type profile defined in Content Server. A content type profile specifies properties that define a specific type of content (for example, a press release, or a news flash, or an image). The content type IDC:GlobalProfile is the name of a default content type profile defined in Content Server that can be applied if no other content type profiles are defined.</td>
</tr>
<tr>
<td>Limit Results</td>
<td>Specify the maximum number of content items to be returned by the query.</td>
</tr>
</tbody>
</table>
Click the Preview tab to view the content that will display in the Document List Viewer task flow.

Note: If the content repository includes an invalid type configuration, then no content displays on the Preview tab. Instead, an error message reports Unable to retrieve content type information.

34.1.3 Understanding the Document Manager Task Flow

The Document Manager task flow displays folders and files as specified by its Layout property (see Section 35.4, “Setting Document Manager Task Flow Properties”):

- **Explorer layout** (default): Displays folders and files in two panes; the left pane shows folders, and the right pane show the contents of the currently selected folder (Figure 34–12). This layout is identical to the Document Explorer task flow, without the properties Show Documents, Show Folders, and Collapse Tree Navigation (see Section 35.2, “Setting Document Explorer Task Flow Properties”).
- **Table layout**: Displays only the contents of the current folder in a single pane, with the capability to click a folder to drill down, refreshing the pane with the folder contents (Figure 34–13).
- **Tree Table layout**: Displays the folder hierarchy in a single pane, beginning with the root folder, with the capability to expand and collapse folders (Figure 34–14). This layout may be familiar to Mac OS X users.

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dates</td>
<td>In the Created and/or Last Modified fields, select a modifier to search for content items matching an exact date (is), a following date (is after), a preceding date (is before), or a date between two other dates (is between), which adds an additional date field for entering the second date. Click the Select Date icon to select a date in the correct format (mm/dd/yy), for example 11/18/11, or enter a date manually.</td>
</tr>
<tr>
<td>Users</td>
<td>In the Created By (user who uploaded) and Last Modified By fields, enter a user name for the creator or last modifier of the content item, or click the Browse icon to open the Search Users dialog where you can select from a list of users or search for a user name. For tips on searching for a user in the identity store, see Section 30.5.1, “Searching for a User or Group in the Identity Store.”</td>
</tr>
<tr>
<td>Additional Query Filters</td>
<td>Not applicable when Content Type is set to All Content Types. For a selected content type profile (prefixed IDC), click the Add icon to list all the properties that are defined for the selected profile (Figure 34–11). Select one or more properties to refine the query to find content items with specific property settings.</td>
</tr>
<tr>
<td>Sort Order</td>
<td>Not applicable when Content Type is set to All Content Types. For a selected content type profile (prefixed IDC), specify a sort order for the properties shown in the Sort On list.</td>
</tr>
</tbody>
</table>
In the Document Manager task flow, you can:

- Click the expand and collapse icons for a folder to show and hide the contents in the folder within the folder hierarchy.
- Click a folder to display the contents of only that folder, and drill down further into subfolders.
- Click a file to display a preview of the file contents in the Document Viewer preview pane, with file management options, including in-place editing for some file types. If the file type does not support a preview (for example, .mp3 music files, video files, or .zip files), the preview pane displays the file properties (see Section 34.1.7, "Understanding the Document Viewer Task Flow").
- Click in a row (not on the folder or file name) in the right pane to perform menu actions on the folder or file in that row (see Section 34.5, "Understanding the Document Task Flows Menus and Actions").

Alternatively, right-click a folder or file to display a context menu of available actions.
Drag and drop folders and files in the task flow hierarchy to reorganize the file or folder structure.

To add a Document Manager task flow to a page, refer to Section 34.4, “Adding a Document Task Flow to a Page.”

**Note:** The Document Manager 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. However, if you navigate to a specific folder in the Default Portal Catalog, this task flow is selectable from the Add menu for the folder (Figure 34–3).

For more information, see Section 23.5.1, "Adding a Resource to a Resource Catalog" (in the Add Resource Catalog Item dialog, select Task Flows, then scroll to Documents for a list of all available content task flows). To use the custom resource catalog for editing portal pages, make sure it is Available, then select it for use by pages in the portal, as described in Section 7.3.5, "Changing the Resource Catalogs for Pages and the Page Template for a Portal."

### 34.1.3.1 Changing the Document Manager Task Flow Default Listing
You can change the default listing displayed in a Document Manager task flow in either of the following ways:

- Selecting a Specific Folder in the Resource Catalog
- Modifying Properties

**Selecting a Specific Folder in the Resource Catalog**
To change the default listing displayed in a Document Manager task flow by selecting a specific folder to display:

- Drill down to a target folder in the resource catalog, then click the corresponding Add link, and select Document Manager (Figure 34–15). For more information, see Section 34.3, "Adding a Selected Folder or File to a Page."

*Figure 34–15  Document Manager Option in Add Menu for Folder*
Modifying Properties
To change the default listing displayed in a Document Manager task flow by modifying the task flow properties:

1. Edit the page, and click the properties Edit icon (wrench) in the task flow chrome (Figure 34–16) to open the Component Properties dialog.

![Edit Properties Icon in Task Flow Chrome](image)

2. To change the target folder, set the Connection Name and Root Folder Path properties on the Parameters tab (see Table 35–3, "Document Manager Task Flow Parameters").

34.1.4 Understanding the Document Navigator Task Flow
The Document Navigator task flow displays a nested hierarchy of folders and files in a single pane, with the capability to expand and collapse folders to view folder hierarchy within the current folder (Figure 34–17). There are no menu options available for this task flow. This task flow is intended for use as a component of another document task flow (such as the Document Explorer task flow). Clicking folders and files in this task flow standalone performs no action. The size of this task flow is narrow to medium page width.

![Document Navigator Task Flow](image)

In the Document Navigator task flow, you can:

- Click the expand and collapse icons for a folder to show and hide the contents in the folder within the folder hierarchy.
- Drag and drop folders and files in the task flow hierarchy to reorganize the file or folder structure.
To add a Document Navigator task flow to a page, refer to Section 34.4, "Adding a Document Task Flow to a Page."

Note: The Document Navigator 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. However, if you navigate to a specific folder in the Default Portal Catalog, this task flow is selectable from the Add menu for the folder (Figure 34–3).

For more information, see Section 23.5.1, "Adding a Resource to a Resource Catalog" (in the Add Resource Catalog Item dialog, select Task Flows, then scroll to Documents for a list of all available content task flows). To use the custom resource catalog for editing portal pages, make sure it is Available, then select it for use by pages in the portal, as described in Section 7.3.5, "Changing the Resource Catalogs for Pages and the Page Template for a Portal."

34.1.4.1 Changing the Document Navigator Task Flow Default Listing

You can change the default listing displayed in a Document Navigator task flow in either of the following ways:

- Selecting a Specific Folder in the Resource Catalog
- Modifying Properties

Selecting a Specific Folder in the Resource Catalog

To change the default listing displayed in a Document Navigator task flow by selecting a specific folder to display:

- Drill down to a target folder in the resource catalog, then click the corresponding Add link, and select Document Navigator (Figure 34–18). For more information, see Section 34.3, "Adding a Selected Folder or File to a Page".

Figure 34–18 Document Navigator Option in Add Menu for Folder
Modifying Properties
To change the default listing displayed in a Document Navigator task flow by modifying the task flow properties:

1. Edit the page, and click the properties Edit icon (wrench) in the task flow chrome (Figure 34–19) to open the Component Properties dialog.

Figure 34–19  Edit Properties Icon in Task Flow Chrome

2. To change the target folder, set the Connection Name and Start Folder Path properties on the Parameters tab (see Table 35–4, “Document Navigator Task Flow Parameters”).

34.1.5 Understanding the Folder Viewer Task Flow
The Folder Viewer task flow displays the contents of a folder in a single pane as a flat listing (Figure 34–20), providing in-place preview and editing of the contents of the folder, and robust document management capabilities with a straightforward interface that should be familiar to Windows users. The size of this task flow is medium to full page width.

Figure 34–20  Folder Viewer Task Flow

In the Folder Viewer task flow, you can:
- Click a folder to display the contents of that folder, and drill down further into subfolders.
- Click a file to display a preview of the file contents in the Document Viewer preview pane, with file management options, including editing for some file types. If the file type does not support a preview (for example, .mp3 music files, video files, or .zip files), the preview pane displays the file properties (see Section 34.1.7, “Understanding the Document Viewer Task Flow”).
- Click in a row (not on the folder or file name) in the right pane to perform menu actions on the folder or file in that row (see Section 34.5, “Understanding the Document Task Flows Menus and Actions”).
  Alternatively, right-click a folder or file to display a context menu of available actions.
- Drag and drop folders and files in the task flow hierarchy to reorganize the file or folder structure.
To add a Folder Viewer task flow to a page, refer to Section 34.4, "Adding a Document Task Flow to a Page." In the Default Portal Catalog, open Content Management, then click Add next to Folder Viewer to display the default listing of folders and files in the root folder of the active content repository connection.

34.1.5.1 Changing the Folder Viewer Task Flow Default Listing

You can change the default listing displayed in a Folder Viewer task flow in either of the following ways:

- Selecting a Specific Folder in the Resource Catalog
- Modifying Properties

Selecting a Specific Folder in the Resource Catalog

To change the default listing displayed in a Folder Viewer task flow by selecting a specific folder to display:

- Drill down to a target folder in the resource catalog, then click the corresponding Add link, and select Folder Viewer (Figure 34–21). For more information, see Section 34.3, "Adding a Selected Folder or File to a Page."

Figure 34–21  Folder Viewer Option in Add Menu for Folder

Modifying Properties

To change the default listing displayed in a Folder Viewer task flow by modifying the task flow properties:

1. Edit the page, and click the properties Edit icon (wrench) in the task flow chrome (Figure 34–22) to open the Component Properties dialog.

Figure 34–22  Edit Properties Icon in Task Flow Chrome

2. To change the target folder, set the Connection Name and Start Folder Path properties on the Parameters tab (see Table 35–5, "Folder Viewer Task Flow Parameters").
34.1.6 Understanding the Recent Documents Task Flow

The Recent Documents task flow displays a listing of the files most recently created or modified by the current user (Figure 34–23).

**Figure 34–23 Recent Documents Task Flow**

![Recent Documents Task Flow](image)

The Recent Documents task flow displays a listing of the files most recently created or modified by the current user. To add a Recent Documents task flow to a page, refer to Section 34.4, "Adding a Document Task Flow to a Page." In the Default Portal Catalog, open Content Management, then click Add next to Recent Documents to display the most recently created or modified files in the current portal.

The default property settings add a listing of the most recently created or modified files in the entire root folder of the active content repository connection to the page. See Section 35.7, "Setting Recent Documents Task Flow Properties" to modify the property settings for the Recent Documents task flow.

34.1.7 Understanding the Document Viewer Task Flow

The Document Viewer displays different content depending on the type of item selected to appear:

- Images (Figure 34–24)
- PDFs (Figure 34–25)
- Wiki documents (Figure 34–26)
- HTML files (Figure 34–27)
- Microsoft Office files (Figure 34–28)
- Files that do not support previews (for example, .mp3 music files, video files, or .zip files; Figure 34–29)
- Site Studio files (Figure 34–30)
About the Document Task Flows

- Folders (Figure 34–31)

To show folder information in a Document Viewer task flow, you must set the task flow’s Item ID property to the ID of the target folder. See Section 35.8, “Setting Document Viewer Task Flow Properties.”

The Document Viewer content can consist of:

- Toolbar with menus and actions
  For all item types; the options differ depending on the item type

- File preview
  For files that support a preview (for example, wiki documents, Microsoft files, images, PDFs)

- Basic properties: the file name, content repository identifier, item type, size, date and time file was created, who created it, date and time file was last modified, and who modified it
  For Microsoft files, and files that do not support a preview (for example, .mp3 music files, video files, or .zip files)

- Advanced properties
  For Microsoft files and files that do not support a preview

- The following tabbed panes:
  - **Comments**: Enter or delete comments for a file to provide additional information that you want to convey to other users about the file. See the “Commenting on Items” section in Using Oracle WebCenter Portal.
  - **Tags**: Specifies keywords related to the content of the file. Tags are useful for making a file more widely discoverable in search results. See the "Working with Tags" section in Using Oracle WebCenter Portal.
  - **History**: Provides version information about the current file, and allows you to selectively delete versions. For more information, see the "Viewing and Deleting File Version History" section in Using Oracle WebCenter Portal.
  - **Info**: Provides the option to edit some properties such a file name and description. In the Advanced section, displays metadata property settings for the file. See the "Working with Folder and File Properties" section in Using Oracle WebCenter Portal.
  - **Links**: Provides a way to view, access, and associate related information by linking a file to a discussion, document, event, note, or URL. For example, you can create a link to associate a project plan document with a list of project issues. See the "Managing Document Links" section in Using Oracle WebCenter Portal.
  - **Recommendations**: Provides suggestions of other documents you might want to view, based on the current document. This list uses the Similar Items task flow, which must be configured to display this pane. See the "Viewing Document Recommendations" section in Using Oracle WebCenter Portal.

By default, the **Comments** pane displays as the active pane. If you have previously launched the Document Viewer to preview a file in the current session, then select another file to preview, the active pane in the Document Viewer is the pane that you last selected when previewing the prior file.
Figure 34–24  Document Viewer Task Flow for Image File
About the Document Task Flows

**Figure 34–25**  Document Viewer Task Flow for PDF File

![Document Viewer Task Flow for PDF File](image)

**Figure 34–26**  Document Viewer Task Flow for Wiki Document

![Document Viewer Task Flow for Wiki Document](image)

Stamp Collector Events

- APC Stamp Show
  August 9-11, 2013
  Milwaukee, WI

- AmanistsampExpo
  February 14-16, 2014
  Little Rock, AR

- Postal History Symposium
  December 12-14, 2014
  Belleville, PA
Meetings are on the first Monday of every month at 7:00pm. When meeting minutes are available, add a link to the minutes.

- January 5th
- February 3rd
- March 3rd
- April 7th
- May 5th
- June 2nd
- July 7th
- August 6th
- September 1st
- October 6th
- November 3rd
- December 1st
Figure 34–28  Document Viewer Task Flow for Microsoft Word File
Figure 34–29  Document Viewer Task Flow for Zip File

![Document Viewer Task Flow for Zip File](image1)

Figure 34–30  Document Viewer Task Flow for Site Studio File

![Document Viewer Task Flow for Site Studio File](image2)
Figure 34–31  Document Viewer Task Flow for Folder

<table>
<thead>
<tr>
<th>Document Viewer</th>
</tr>
</thead>
<tbody>
<tr>
<td>File ▼ View ▼</td>
</tr>
<tr>
<td>Basic</td>
</tr>
<tr>
<td>Name</td>
</tr>
<tr>
<td>Identifier</td>
</tr>
<tr>
<td>Type</td>
</tr>
<tr>
<td>Created</td>
</tr>
<tr>
<td>Created By</td>
</tr>
<tr>
<td>Last Modified</td>
</tr>
<tr>
<td>Last Modified By</td>
</tr>
<tr>
<td>Last modified on 6/26/13 11:03 AM by sysadmin</td>
</tr>
</tbody>
</table>

To add a Document Viewer task flow to a page, refer to Section 34.4, "Adding a Document Task Flow to a Page." In the Default Portal Catalog, open Content Management, navigate to the file that you want to add to the page, then click the Add link next to the file, and select Document Viewer. To show folder information in a Document Viewer task flow, you must set the task flow’s Item ID property to the ID of the target folder.

For information about setting properties on the Document Viewer task flow, see Section 35.8, "Setting Document Viewer Task Flow Properties."

34.1.8 Understanding the Document Mini Properties Task Flow

The Document Mini Properties task flow can display:

- The Basic properties of an individual file in a read-only view (Figure 34–32). This choice is available for all file types.

Figure 34–32  Mini Properties Task Flow for File

<table>
<thead>
<tr>
<th>Mini Properties</th>
</tr>
</thead>
<tbody>
<tr>
<td>lincoln stamps.doc</td>
</tr>
<tr>
<td>Size</td>
</tr>
<tr>
<td>Created</td>
</tr>
<tr>
<td>Created By</td>
</tr>
<tr>
<td>Last Modified</td>
</tr>
<tr>
<td>Last Modified By</td>
</tr>
<tr>
<td>Location</td>
</tr>
</tbody>
</table>

- Folder properties and settings.

To add a Document Mini Properties task flow to a page, refer to Section 34.3, "Adding a Selected Folder or File to a Page." In the Default Portal Catalog, open Content Management, navigate to the file that you want to add to the page, then click the Add link next to the file, and select Mini Properties. To show folder information in a Document Mini Properties task flow, you must set the task flow’s Resource ID property to the ID of the target folder.
For information about setting properties on the Mini Properties task flow, see Section 35.9, "Setting Document Mini Properties Task Flow Properties"

34.1.9 Understanding the Document Properties Task Flow

The Document Properties task flow can display:

- Both Basic and Advanced properties of an individual file, along with an **Edit** button to allow you to modify property values (Figure 34–33). This choice is available for all file types. See the "Working with Folder and File Properties" section in *Using Oracle WebCenter Portal*. 
Folder properties and settings.

To add a Document Properties task flow to a page, refer to Section 34.3, "Adding a Selected Folder or File to a Page." In the Default Portal Catalog, open Content Management, navigate to the file that you want to add to the page, then click the Add link next to the file, and select Document Properties. To show folder information in a Document Properties task flow, you must set the task flow’s Item ID property to the ID of the target folder.

### 34.1.10 Understanding the Document Version History Task Flow

The Document Version History task flow displays a list of versions of an individual file, allowing for deletion of a selected version (Figure 34–34 and Figure 34–35). This choice is available for all file types. See the "Viewing and Deleting File Version History" section in Using Oracle WebCenter Portal.

**Figure 34–34**  
Version History Task Flow for File: Vertical Layout (Horizontal Layout property deselected (default))

![Figure 34–34](image)

**Figure 34–35**  
Version History Task Flow for File: Horizontal Layout property selected

![Figure 34–35](image)

To add a Document Version History task flow to a page, refer to Section 34.3, "Adding a Selected Folder or File to a Page." In the Default Portal Catalog, open Content Management, navigate to the file that you want to add to the page, then click the Add link next to the file, and select Version History.

You can set the Horizontal Layout property of the task flow to specify whether you want the version history information to format vertically (Figure 34–34) or horizontally (Figure 34–35). For information about setting properties on the Document Version History task flow, see Section 35.11, "Setting Document Version History Task Flow Properties."

### 34.2 About Document Components

The Documents tool provides features for adding document components to a page in a portal. As described in Section 34.3, "Adding a Selected Folder or File to a Page", you use the resource catalog to add a document component to a page as a container for a selected folder or file (Figure 34–36).
Document components enable you to display an individual file on a page in a variety of ways, depending on the file type:

- A **Link** displays the name of a selected file as a link, which end users can click to display the file content in its native application (Figure 34–37).

  ![Link Component (for Microsoft Word file)](lincoln_stamps.doc)

- An **Inline Frame** displays the content of a selected file as a preview (Figure 34–38).

  ![Inline Frame Component (for HTML file)](Lincoln Portraits)

- An **Image** displays a selected file as an image (Figure 34–39).
Table 34–3 shows the content types that support each of these document components.

<table>
<thead>
<tr>
<th>Content Type</th>
<th>Document Components</th>
</tr>
</thead>
<tbody>
<tr>
<td>Documents of various types (XML, PDF, JAVA, TXT, DOC,</td>
<td>Link</td>
</tr>
<tr>
<td>XLS, HTM)</td>
<td></td>
</tr>
<tr>
<td>Documents that can be rendered in a browser (HTML,</td>
<td>Inline frame</td>
</tr>
<tr>
<td>flash, PDF and image)</td>
<td></td>
</tr>
<tr>
<td>Images (PNG, JPG, GIF)</td>
<td>Link</td>
</tr>
<tr>
<td></td>
<td>Inline frame</td>
</tr>
<tr>
<td></td>
<td>Image</td>
</tr>
</tbody>
</table>

To display a folder or file using one of these document components, see Section 34.3, "Adding a Selected Folder or File to a Page."

### 34.3 Adding a Selected Folder or File to a Page

**Note:** If you want to place a single HTML file on a page, and no other components, it is more efficient to create a page using the HTML page style, rather than adding an HTML file to an existing page. For more information about the HTML page style, see Section 25.1, "About Page Styles."

You can display an individual folder or file from a connected content repository on a page, by choosing the required container for the selected folder or file in the resource catalog, as shown in Figure 34–40 and Figure 34–41.

**Note:** When you add a folder or file from Content Server to a page in a portal, it can be viewed and managed from within WebCenter Portal. However, any folder shortcuts created in Content Server cannot be viewed and managed from within WebCenter Portal.
Adding a Selected Folder or File to a Page

Table 34–4 lists all containers available for displaying folders and files on a portal page.
Adding a Selected Folder or File to a Page

Working with Document Task Flows and Document Components

An Image component, which can optionally link to another location when clicked. Note that image components cannot be returned in a search. To add an Image component to a page, see Section 15.2, "Adding a Web Development Component to a Page."

An image file, which is selected from the connected content repository to display on a page standalone or in a Content Presenter task flow. Image files can be returned in a search. This section describes how to add an image file to a page.

An image added to a wiki document or wiki page, using the Embed Image tool in the Rich Text Editor. To add an image to a wiki, see the "About the Rich Text Editor Toolbar" section in Using Oracle WebCenter Portal.

For more information about any of the containers listed in Table 34–4, see Section 33.1, "About the Content Presenter Task Flow," Section 34.1, "About the Document Task Flows," and Section 34.2, "About Document Components."

Table 34–4  Adding Individual Folders and Files to a Page

<table>
<thead>
<tr>
<th>For Folders</th>
<th>For Individual Files</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Content Presenter task flow</strong> displays a selected folder in the default display template for folder content: List View.</td>
<td><strong>Content Presenter task flow</strong> displays a selected file in the default display template for its file type. For content that may include editing controls, such as wikis, this selection does not expose the editing controls when displayed on a page.</td>
</tr>
<tr>
<td><strong>Document Explorer task flow</strong> displays folders and files in two panes, combining the functionality of the Document Navigator and Folder Viewer task flows. It provides in-place previewing and editing, and robust management capabilities.</td>
<td><strong>Document Viewer task flow</strong> displays a preview of a file, or file properties for files that do not support a preview. For content that may include editing controls, such as wikis, this selection exposes the editing controls when displayed on a page. You can use the Features Off property of the Document Viewer task flow to hide some controls.</td>
</tr>
<tr>
<td><strong>Document List Viewer task flow</strong> displays folders and files in a single pane as a flat listing. It provides preview and editing in a separate window, and some management capabilities.</td>
<td><strong>Document Mini Properties task flow</strong> displays the basic properties of a file in a read-only view.</td>
</tr>
<tr>
<td><strong>Document Manager task flow</strong> displays folders and files as specified by its Layout property: Explorer, Table, or Tree Table.</td>
<td><strong>Document Properties task flow</strong> displays both Basic and Advanced properties of a file, along with an Edit button to allow you to modify property values.</td>
</tr>
<tr>
<td><strong>Document Navigator task flow</strong> displays a simple listing of folders and files in a single pane, providing expand/collapse on folders to show the full hierarchy.</td>
<td><strong>Document Version History task flow</strong> displays a list of versions of a file, allowing for deletion of a selected version.</td>
</tr>
<tr>
<td><strong>Folder Viewer task flow</strong> displays the contents of a folder in a single pane as a flat listing, providing in-place preview and editing, and robust management capabilities.</td>
<td><strong>Link component</strong></td>
</tr>
<tr>
<td><strong>Document Viewer task flow</strong>¹</td>
<td><strong>Inline Frame component</strong></td>
</tr>
<tr>
<td><strong>Document Mini Properties task flow</strong>¹</td>
<td><strong>Image component</strong>²</td>
</tr>
</tbody>
</table>

¹ To show folder information in a Document Viewer, Document Mini Properties, or Document Properties task flow, you must set the task flow's resource ID parameter to the ID of the target folder. See Chapter 35, "Setting Document Task Flow and Document Component Properties."

² You can add an image to a portal in any of the following ways:

- An Image component, which can optionally link to another location when clicked. An image file, which is selected from the connected content repository to display on a page standalone or in a Content Presenter task flow. Image files can be returned in a search. This section describes how to add an image file to a page.
- An image added to a wiki document or wiki page, using the Embed Image tool in the Rich Text Editor. To add an image to a wiki, see the "About the Rich Text Editor Toolbar" section in Using Oracle WebCenter Portal. For more information about any of the containers listed in Table 34–4, see Section 33.1, "About the Content Presenter Task Flow," Section 34.1, "About the Document Task Flows," and Section 34.2, "About Document Components."
Adding a Selected Folder or File to a Page

Notes:

- Another way of adding folders and files to a page is through a custom navigation model added to a page. Application specialists can build custom navigation models, which can be added to the page templates for a portal to allow end users to navigate the documents in the portal. For more information, see Section 22.3.3, "Adding Items to a Navigation Model."

- When an item that is stored in a content repository is added to a page, the WebCenter Portal application instructs the browser to check whether the content is up-to-date before a cached copy, if available, displays in the browser. The default content validation process supports collaboration use cases that require real-time content exchange.

- For static content or content that does not change frequently, content validation checks incur an unnecessary performance overhead. For static content, Oracle recommends the following:
  
  - **Content Server**: use Content Presenter to display static content stored in Content Server. Content Presenter shows the latest released version of content; and provides controls to preview unreleased content that is in workflow.
  
  - **Other content repositories (such as SharePoint)**: ask your administrator to override the default content cache setting by editing the Web Tier mod_wl_ohs configuration file (mod_wl_ohs.conf). This is fully explained in "Setting the Cache-Control Response Header" in the white paper "Integrating the SharePoint 2007 Adapter with WebCenter Portal" available from Oracle Technology Network at http://www.oracle.com/technetwork/middleware/webcenter/owcs-ps3-sharepoint-wcs-wp-335282.pdf.

To add a selected folder or file to a page in a portal:

1. Open the page in edit mode (see Section 12.4.3, "Opening a Page in the Page Editor (Composer)").

   **Note:** By default, the view switcher is set to **Web** and Composer displays the page in Design view showing the inline resource catalog.

2. Navigate to the section of the resource catalog that provides access to the folders and files in the connected content repository.
Tip: The presence or location of this section depends on how the resource catalog is configured. For example, in the Default Portal Catalog, next to Content Management, click Open to expose the content selections (Figure 34–42).

3. The next link you click depends on your current location in the application. If you are using the Default Portal Catalog (Figure 34–43):
   - Click All Content to display all folders and files to which you have access.
   - In a portal, click Portal Documents, which provides a shortcut to a list of all of the folders and files to which you have access in the current portal. This selection is shown only if the Documents tool is enabled in the portal (see Section 39.2, "Enabling and Disabling Tools and Services Available to a Portal").
   - In the Home portal, click Personal Documents, which provides a shortcut to a list of all the folders and files to which you have access in the Home portal.
4. Continue to drill down into folders until you arrive at the folder or file that you want to add to the page, then click the **Add** link next to the folder or file to display a menu of available containers for the folder or file, applicable to the file type (Figure 34–44, Figure 34–45, Figure 34–46, and Figure 34–47).

**Note:** When you drill down to the folders and files in the connected content repository, you are drilling into the live connection with the content repository. The documents you see listed are not static resources, but reflect the latest status of folders and files in the content repository associated with your WebCenter Portal application.
Figure 34–44  Add Menu for Folder in Resource Catalog

Figure 34–45  Add Menu for Microsoft Word File in Resource Catalog
5. Select the content task flow or document component that you wish to use. The menu displays only those containers that support the selected folder or file.
6. Click **Save** to save your changes.

### 34.4 Adding a Document Task Flow to a Page

See Section 34.1, "About the Document Task Flows" to help you select the task flow most appropriate for your needs.

If you want to add and manage a specific folder or file in a document task flow, refer to Section 34.3, "Adding a Selected Folder or File to a Page." This section describes how to select and add a document task flow independent of a specific folder or file. The task flow is auto-populated with the folders and files in the connected content repository.

To add a document task flow to a page:

1. Open the page in edit mode (see Section 12.4.3, "Opening a Page in the Page Editor (Composer)").

   **Note:** By default, the view switcher is set to **Web** and Composer displays the page in Design view showing the inline resource catalog.

2. Navigate to the section of the resource catalog that provides access to the folders and files in the connected content repository.

   **Tip:** The presence or location of this section depends on how the resource catalog is configured. For example, in the Default Portal Catalog, next to **Content Management**, click **Open** to expose the content selections (Figure 34–48).
For information about the selections shown in the Default Portal Catalog, see Section 32.2, "About Content Management Selections in the Resource Catalog."

3. Click Add next to the task flow that you want to add to your page (Figure 34-49).
In a portal, if the Documents tool is enabled (see Section 39.2, "Enabling and Disabling Tools and Services Available to a Portal"), the selected task flow will by default display folders and files based on the primary content repository connection, or you can display only documents belonging to the portal. If the Documents tool is not enabled...
in a portal, folders and files will not display in the task flow unless you edit the default
task flow properties to specify a content repository (see Chapter 35, "Setting Document
Task Flow and Document Component Properties").

Use the menus and actions available in the document task flow you have added to
work with folders and files in the connected content repository, as described in
Section 34.5, "Understanding the Document Task Flows Menus and Actions."

34.5 Understanding the Document Task Flows Menus and Actions

The document task flows that offer content management functionality are Document
Explorer, Folder Viewer, and Document Manager. For these task flows, the menus and
actions for working with the folders and files are described in the "Actions for
Working with Folders and Files" section in Using Oracle WebCenter Portal.

34.6 Troubleshooting Documents Tool Issues

This section includes the following subsections:

• Section 34.6.1, "Document Permissions Not Working in a Portal"
• Section 34.6.2, "Document Permissions Not Granted When Creating a Portal"

34.6.1 Document Permissions Not Working in a Portal

If a user cannot perform certain actions on documents, even though they are granted
appropriate Document permissions in the portal, do one of the following:

---

**Note:** You must be the portal moderator or have the Manage
Membership permission to grant permissions in the portal.
---

• Revoke the user’s membership to the portal, and then add them back to the portal.
  For details, see Section 30.9, "Revoking Membership to a Portal" and Section 30.5,
  "Adding Members to a Portal."

• Temporarily change the user’s role, and then change it back to the required role.
  For details, see Section 30.6, "Changing Member Role Assignments."

If multiple users cannot perform actions on documents, even though they are granted
appropriate permissions in the portal, try editing the role to which the affected users
are assigned:

1. Identify the membership role that the affected users have and note down the
current permission set. See Section 29.3, "Viewing and Editing Permissions of a
Portal Role."

2. Deselect all permissions for the role, and click Save.

3. Edit the role again, select all required permissions for the role, and click Save.

34.6.2 Document Permissions Not Granted When Creating a Portal

If you see the following error when you create a portal based on a template that
includes the Documents tool, an error occurred while attempting to grant permissions
for the new portal on the back-end content server:

Granting permissions for Documents failed
Ask your system administrator to review the WebCenter Portal log (at \texttt{DOMAIN_HOME/servers/WC_Spaces/logs/WC_Spaces-diagnostic.log}) to see if any messages indicate the source of the error. If the cause of the error is not clear, try resetting Document permissions on each role in the portal:

1. Edit permissions for each role in turn. See Section 29.3, "Viewing and Editing Permissions of a Portal Role."

2. Deselect any Document permissions set for the role, and click \textit{Save}.

3. Edit the role again, select the required permissions for the role, and click \textit{Save}.

4. Repeat for all the roles in the portal.

Failures, if any, are logged in the WebCenter Portal log.
This chapter describes the properties that you can set on the document task flows and individual document components (links, inline frames, and images).

This chapter includes the following topics:

- Section 35.1, "About Document Task Flow and Document Component Properties"
- Section 35.2, "Setting Document Explorer Task Flow Properties"
- Section 35.3, "Setting Document List Viewer Task Flow Properties"
- Section 35.4, "Setting Document Manager Task Flow Properties"
- Section 35.5, "Setting Document Navigator Task Flow Properties"
- Section 35.6, "Setting Folder Viewer Task Flow Properties"
- Section 35.7, "Setting Recent Documents Task Flow Properties"
- Section 35.8, "Setting Document Viewer Task Flow Properties"
- Section 35.9, "Setting Document Mini Properties Task Flow Properties"
- Section 35.10, "Setting Document Properties Task Flow Properties"
- Section 35.11, "Setting Document Version History Task Flow Properties"
- Section 35.12, "Setting Document Link Component Properties"
- Section 35.13, "Setting Document Inline Frame Component Properties"
- Section 35.14, "Setting Document Image Component Properties"
- Section 35.15, "Features Off Property Values"

Permissions: To perform the tasks in this chapter, you need the following portal-level permissions:

- Basic Services: Edit Page Access and Structure (standard permissions) or Pages: Edit Pages (advanced permissions)
- Documents permissions (advanced permissions).

For more information about permissions, see Section 29.1, "About Roles and Permissions for a Portal."
35.1 About Document Task Flow and Document Component Properties

All document task flows and individual document components in WebCenter Portal have associated properties, which users with sufficient privileges can access through the Component Properties dialog in Composer (Figure 35–1).

![Component Properties: Document Explorer](image)

For the steps to add a document task flow or document item to a page, see Chapter 34, "Working with Document Task Flows and Document Components."

For information about accessing the Component Properties dialog, see Section 14.3, "Modifying Component Properties."

The properties on the Parameters tab of the Component Properties dialog control the default task flow content. These properties are unique to the task flow type. For some task flows, parameters on this tab facilitate the wiring of the task flow to page parameters and page definition variables. For more information, see Chapter 19, "Wiring Pages, Task Flows, Portlets, and ADF Components."

Changes to the properties on the Display Options, Style, and Content Style tabs affect the appearance and behavior of the task flow for all users. These properties are common to all task flows. For more information, see Section 14.3.4, "Working with Component Display Options" and Section 14.3.6, "Working with Style and Content Style Properties."

The contents of the Events tab depend on the events supported by the task flow. For more information, see Section 14.3.7, "Working with Component Contextual Events."

The Child Components tab displays all of the components contained within the current component. It provides controls for rearranging, showing, and hiding child
components. Not all components contain children. So this tab may be omitted. For more information, see Section 14.3.5, "Working with Child Components."

All properties on the Parameters and Display Options tabs provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the down arrow icon next to a property field to open the editor.

**Note:** When you enter EL on the generic Display Options tab in the Component Properties 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 14–1, "Display Options Properties".

If you need EL assistance, an application developer can provide an EL expression; see the “Expression Language Expressions” appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

### 35.2 Setting Document Explorer Task Flow Properties

The Document Explorer task flow displays a list of folders and files in two panes: the left pane shows folders, and the right pane show the contents of the currently selected folder. It is a feature-rich document task flow for viewing, managing, and collaborating on folders and files.

**See Also:** "Understanding the Document Explorer Task Flow"

Properties that are unique to the Document Explorer task flow are shown on the Parameters tab of the Component Properties dialog (Figure 35–2).

**Tip:** For information about accessing the Component Properties dialog, see Section 14.3, "Modifying Component Properties."
35.2.1 Document Explorer Task Flow Parameters

Table 35–1 describes the parameters that are unique to the Document Explorer task flow.

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Collapse Tree Navigation</td>
<td>Specifies whether to collapse the panel containing the tree navigation:</td>
</tr>
<tr>
<td></td>
<td>■ Select (default) to collapse then panel.</td>
</tr>
<tr>
<td></td>
<td>■ Deselect to expand panel.</td>
</tr>
</tbody>
</table>
### Table 35–1 (Cont.) Document Explorer Task Flow Parameters

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
</table>
| Connection Name | The name of the content repository connection. If no value is selected from the list, the default connection specified by the system administrator is used. For information about configuring content repository connections, see the "Registering Content Repositories" section in *Administering Oracle WebCenter Portal*.  
Default: The connection selected as default in the Create Content Repository Connection dialog box, which can be changed by the administrator.  
**Note:** While the Documents task flows allow 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 Documents task flows added to the portal will use iframes to display file content, such as PDF files. |
| Features Off    | A list of disabled features for the task flow. Use commas or spaces to separate items. For a list of valid values and their uses, see Section 35.15, "Features Off Property Values."  
Example:  
$\{'search, advancedSearch, clipboard, rename, newfolder, upload, checkin, checkout, editoffice, edithtml, delete, sidebars, history\}$ |
| Page Size       | The maximum number of rows to show in the task flow. If the listing of folders and files in the task flow is larger than the specified number of rows, the task flow displays a scroll bar. Default: 27  
Typical scenarios where you may wish to alter this value are:  
- The majority of end users have bigger screens, allowing for the display of more rows.  
- You want to fit this task flow into a smaller area of a page.  
**Note:** If you set Page Size to a value that is too big for the size of the screen, the end user will experience difficulty coordinating the task flow scroll bar with the application scroll bar. |
| Read Only       | Specifies whether to disable and hide all content management operations:  
- Select to disable content management.  
- Deselect (default) to expose content management to users. |
| Resource ID     | The currently focused resource. This value can be a folder ID or a document ID. Click the magnifier icon to open the Pick a Value dialog and navigate to the desired folder or file; select the folder or file to set the Resource ID value.  
The Resource ID value is checked for coherence with the Connection Name and Start Folder Path values, and influences their default values when they are not explicitly specified. For example, if Resource ID alone is specified, the Connection Name value will be inherited from it and the Start Folder Path will be either the resource itself for a folder or the parent folder for a file. |
| Show Documents  | Specifies whether the navigation tree shows documents and folders in the tree (left-side) navigation page, or folders only:  
- Select to show documents and folders.  
- Deselect (default) to show folders and hide documents. |
35.3 Setting Document List Viewer Task Flow Properties

The Document List Viewer task flow displays folders and files in a single pane as a flat listing. In this task flow, users can navigate a folder hierarchy, and customize search queries. While this task flow may be useful for a specific need, its search functionality is replicated and enhanced by using the Content Presenter task flow instead.

See Also: "Understanding the Document List Viewer Task Flow"

Properties that are unique to the Document List Viewer task flow are shown on the Parameters tab of the Component Properties dialog (Figure 35–3).

Tip: For information about accessing the Component Properties dialog, see Section 14.3, "Modifying Component Properties.”
Figure 35–3  Document List Viewer Task Flow Properties

Table 35–2  Document List Viewer Task Flow Parameters

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
</table>
| Connection Name    | The name of the content repository connection. If no value is selected from the list, the default connection specified by the system administrator is used. For information about configuring content repository connections, see the "Registering Content Repositories" section in Administering Oracle WebCenter Portal.

Default: The connection selected as default in the Create Content Repository Connection dialog box, which can be changed by the administrator.

Note: While the Documents task flows allow 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 Documents task flows added to the portal will use iFrames to display file content, such as PDF files.
Table 35–2  (Cont.) Document List Viewer Task Flow Parameters

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
</table>
| Created After      | A filtering value to limit the display of task flow content to folders and files created after a specified date and time. Click the magnifier icon to open a dialog where you can select the date from a calendar. The value uses the ISO 8601 format: yyyy-mm-ddThh:mm:ss.sssTZ
Example: 2010-11-17T18:24:36.000+01:00 This parameter is available for contextual wiring. For more information, see Chapter 19, "Wiring Pages, Task Flows, Portlets, and ADF Components." |
| Created Before     | A filtering value to limit the display of task flow content to folders and files created before a specified date and time. Click the magnifier icon to open a dialog where you can select the date from a calendar. The value uses the ISO 8601 format: yyyy-mm-ddThh:mm:ss.sssTZ
Example: 2010-11-17T18:24:36.000+01:00 This parameter is available for contextual wiring. For more information, see Chapter 19, "Wiring Pages, Task Flows, Portlets, and ADF Components." |
| Creator            | A filtering value to limit the display of task flow content to folders and files created by a particular user. Enter the user name as specified by the user login credentials. Only one user name may be entered. If no value is entered, then content created by any user is shown. Example: ${'monty'} This parameter is available for contextual wiring. For more information, see Chapter 19, "Wiring Pages, Task Flows, Portlets, and ADF Components." |
| Last Modified After| A filtering value to limit the display of task flow content to folders and files last modified after a specified date and time. If no value is entered, then content modified in the last three months is shown. Click the magnifier icon to open a dialog where you can select the date from a calendar. The value uses the ISO 8601 format: yyyy-mm-ddThh:mm:ss.sssTZD
Example: 2010-11-17T18:24:36.000+01.00 This parameter is available for contextual wiring. For more information, see Chapter 19, "Wiring Pages, Task Flows, Portlets, and ADF Components." |
### Parameter Description

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
</table>
| Last Modified Before | A filtering value to limit the display of task flow content to folders and files modified before a specified date and time. If no value is entered, then no such filtering is applied. Click the magnifier icon to open a dialog where you can select the date from a calendar. The value uses the ISO 8601 format: `yyyy-mm-ddThh:mm:ss.sssTZD`
| Example:          | `2010-11-17T18:24:36.000+01:00`                                                                                                                                  |
|                   | This parameter is available for contextual wiring. For more information, see Chapter 19, “Wiring Pages, Task Flows, Portlets, and ADF Components.”                  |
| Last Modifier     | A filtering value to limit the display of task flow content to folders and files last modified by a particular user. Enter the user name as specified by the user login credentials. Only one user name may be entered. If no value is entered, then all modified documents are shown. Example: `$('monty')` |
|                   | This parameter is available for contextual wiring. For more information, see Chapter 19, “Wiring Pages, Task Flows, Portlets, and ADF Components.”                  |
| Page Size         | The maximum number of rows to show in the task flow. If the listing of folders and files in the task flow is larger than the specified number of rows, the task flow displays a scroll bar. Default: 15
|                   | Typical scenarios where you may wish to alter this value are:  
|                   | ■ The majority of end users have bigger screens, allowing for the display of more rows.  
|                   | ■ You want to fit this task flow into a smaller area of a page.  
|                   | **Note:** If you set *Page Size* to a value that is too big for the size of the screen, the end user will experience difficulty coordinating the task flow scroll bar with the application scroll bar. |
| Root Folder Path  | The name of the folder to use as the root folder in the current task flow instance. Click the magnifier icon to open a dialog where you can navigate the connected content repository and select a folder. This is a content-scoping parameter that assists with determining the source and range of content to display in the task flow instance. There is no need to set this value for task flows that display the content of the current portal's default root folder. But it is useful, for example, when you want the start folder to be other than a portal's default root folder and when you want to display content from another portal. Example:  
|                   | ■ `/Enterprise Libraries/monty/Public`  
|                   | ■ `/Enterprise Libraries/Proj_X/Specs`  
|                   | You can specify an EL expression to set this value. If you need EL assistance, an application developer can provide an EL expression; see the "Expression Language Expressions" appendix in *Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.*  
|                   | Default: The root folder of the content repository configured with the specified connection for the current portal.                                                                                           |
35.4 Setting Document Manager Task Flow Properties

The Document Manager task flow displays folders and files as specified by its \textit{layout} parameter: it may display folders and files in two panes (\textit{Explorer} layout), or a single pane showing only the content of the current folder (\textit{Table} layout), or a single pane showing the folder hierarchy starting from the root folder (\textit{Tree-Table} layout). The Document Manager task flow provides comprehensive document management functionality, such as copying, moving, pasting, and deleting folders and files.

\textbf{See Also:} "Understanding the Document Manager Task Flow"

Properties that are unique to the Document Manager task flow are shown on the \textbf{Parameters} tab of the Component Properties dialog (Figure 35–4).

\textbf{Tip:} For information about accessing the Component Properties dialog, see Section 14.3, "Modifying Component Properties."

\begin{table}[h]
\centering
\caption{Document List Viewer Task Flow Parameters (Cont.)}
\begin{tabular}{|l|l|}
\hline
\textbf{Parameter} & \textbf{Description} \\
\hline
Show Folders & Specifies whether the navigation tree shows documents and folders, or documents only: \\
& \begin{itemize}
  \item Select (default) to show folders and documents.
  \item Deselect to show documents and hide folders.
\end{itemize} \\
\hline
Task Flow Instance ID & The unique identifier for this task flow instance, used internally to maintain the association of the task flow instance with its customization and personalization settings and to manage saved queries. Do not edit this value. \\
\hline
\end{tabular}
\end{table}

\footnote{"TZ" is the time zone indicator. If the time being described is in UTC (Coordinated Universal Time), then the time zone indicator is "Z". If the time is from any other time zone, then TZ describes the offset from UTC of the time zone. For example, if the time is in California in December (Pacific Standard Time, PST), then the TZ indicator would be "-08:00".}
35.4.1 Document Manager Task Flow Parameters

Table 35–3 describes the parameters that are unique to the Document Manager task flow.

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Connection Name</td>
<td>The name of the content repository connection. If no value is selected from the list, the default connection specified by the system administrator is used. For information about configuring content repository connections, see the “Registering Content Repositories” section in Administering Oracle WebCenter Portal. Default: The connection selected as default in the Create Content Repository Connection dialog box, which can be changed by the administrator. Note: While the Documents task flows allow 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 Documents task flows added to the portal will use iFrames to display file content, such as PDF files.</td>
</tr>
</tbody>
</table>
### Table 35–3 (Cont.) Document Manager Task Flow Parameters

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
</table>
| **Features Off**   | A list of disabled features for the task flow. Use commas or spaces to separate items. For a list of valid values and their uses, see Section 35.15, "Features Off Property Values.”
| Example:           | `${'search, advancedSearch, clipboard, rename, newfolder, upload, checkin, checkout, editoffice, edithtml, delete, sidebars, history'})` |
| **Layout**         | A target layout for the task flow. Choose from:
| • Explorer (default): Displays folders and files in two panes; the left pane shows folders, and the right pane show the contents of the currently selected folder. This layout looks identical to the Document Explorer task flow, without the properties Show Documents, Show Folders, and Collapse Tree Navigation. See Figure 34–12, "Document Manager Task Flow: Explorer Layout". |
| • Table: Displays only the contents of the current folder in a single pane, with the capability to click a folder to drill down, refreshing the pane with the folder contents. See Figure 34–13, "Document Manager Task Flow: Table Layout". |
| • Tree Table: Displays the folder hierarchy in a single pane, beginning with the root folder, with the capability to expand and collapse folders. Figure 34–14, "Document Manager Task Flow: Tree Table Layout" |
| **Page Size**      | The maximum number of rows to show in the task flow. If the listing of folders and files in the task flow is larger than the specified number of rows, the task flow displays a scroll bar. Default: 27
| Typical scenarios where you may wish to alter this value are:
| • The majority of end users have bigger screens, allowing for the display of more rows. |
| • You want to fit this task flow into a smaller area of a page.
| **Note:** If you set Page Size to a value that is too big for the size of the screen, the end user will experience difficulty coordinating the task flow scroll bar with the application scroll bar. |
| **Read Only**      | Specifies whether to disable and hide all content management operations:
| • Select to disable content management. |
| • Deselect (default) to expose content management to users. |
| **Resource ID**    | The currently focused resource. This value can be a folder ID or a document ID. Click the magnifier icon to open the Pick a Value dialog and navigate to the desired folder or file; select the folder or file to set the Resource ID value.
| The Resource ID value is checked for coherence with the Connection Name and Start Folder Path values, and influences their default values when they are not explicitly specified. For example, if Resource ID alone is specified, the Connection Name value will be inherited from it and the Start Folder Path will be either the resource itself for a folder or the parent folder for a file. |
Setting Document Navigator Task Flow Properties

The Document Navigator task flow displays folders and files in a single pane, with the capability to expand and collapse folders to view folder hierarchy within the current folder. There are no menu options available to the end user for this task flow. This task flow is intended for use as a component of another document task flow (such as the Document Explorer task flow). Clicking folders and files in this task flow standalone performs no action.

See Also: "Understanding the Document Navigator Task Flow"

Properties that are unique to the Document Navigator task flow are shown on the Parameters tab of the Component Properties dialog (Figure 35–5).

Tip: For information about accessing the Component Properties dialog, see Section 14.3, "Modifying Component Properties."

### Table 35–3 (Cont.) Document Manager Task Flow Parameters

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start Folder Path</td>
<td>The name of the folder to use as the root folder in the current task flow instance. Click the magnifier icon to open a dialog where you can navigate the connected content repository and select a folder. This is a content-scoping parameter that assists with determining the source and range of content to display in the task flow instance. There is no need to set this value for task flows that display the content of the current portal's default root folder. But it is useful, for example, when you want the start folder to be other than a portal's default root folder and when you want to display content from another portal. Example:</td>
</tr>
<tr>
<td></td>
<td>- /Enterprise Libraries/monty/Public</td>
</tr>
<tr>
<td></td>
<td>- /Enterprise Libraries/Proj_X/Specs</td>
</tr>
<tr>
<td></td>
<td>You can specify an EL expression to set this value. If you need EL assistance, an application developer can provide an EL expression; see the &quot;Expression Language Expressions&quot; appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper. Default: The root folder of the content repository configured with the specified connection for the current portal.</td>
</tr>
</tbody>
</table>
Figure 35–5  Document Navigator Task Flow Properties

For information about the properties on the other tabs, which are common to all WebCenter Portal components, see Section 14.3, "Modifying Component Properties."

35.5.1 Document Navigator Task Flow Parameters

Table 35–4 describes the parameters that are unique to the Document Navigator task flow.

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Connection Name</td>
<td>The name of the content repository connection. If no value is selected from the list, the default connection specified by the system administrator is used. For information about configuring content repository connections, see the &quot;Registering Content Repositories&quot; section in Administering Oracle WebCenter Portal. Default: The connection selected as default in the Create Content Repository Connection dialog box, which can be changed by the administrator. Note: While the Documents task flows allow 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 Documents task flows added to the portal will use iFrames to display file content, such as PDF files.</td>
</tr>
</tbody>
</table>
Table 35–4 (Cont.) Document Navigator Task Flow Parameters

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Features Off</td>
<td>A list of disabled features for the task flow. Use commas or spaces to</td>
</tr>
<tr>
<td></td>
<td>separate items. For a list of valid values and their uses, see Section</td>
</tr>
<tr>
<td></td>
<td>35.15, “Features Off Property Values.”</td>
</tr>
<tr>
<td></td>
<td>Example: $(‘search, advancedSearch, clipboard, rename, newfolder, upload,</td>
</tr>
<tr>
<td></td>
<td>checkin, checkout, editoffice, edithtml, delete, sidebars, history’)</td>
</tr>
<tr>
<td>Page Size</td>
<td>The maximum number of rows to show in the task flow. If the listing of</td>
</tr>
<tr>
<td></td>
<td>folders and files in the task flow is larger than the specified number of</td>
</tr>
<tr>
<td></td>
<td>rows, the task flow displays a scroll bar. Default: 27</td>
</tr>
<tr>
<td></td>
<td>Typical scenarios where you may wish to alter this value are:</td>
</tr>
<tr>
<td></td>
<td>■ The majority of end users have bigger screens, allowing for the</td>
</tr>
<tr>
<td></td>
<td>display of more rows.</td>
</tr>
<tr>
<td></td>
<td>■ You want to fit this task flow into a smaller area of a page.</td>
</tr>
<tr>
<td></td>
<td>Note: If you set Page Size to a value that is too big for the size of the</td>
</tr>
<tr>
<td></td>
<td>screen, the end user will experience difficulty coordinating the task</td>
</tr>
<tr>
<td></td>
<td>flow scroll bar with the application scroll bar.</td>
</tr>
<tr>
<td>Read Only</td>
<td>Specifies whether to disable and hide all content management operations:</td>
</tr>
<tr>
<td></td>
<td>■ Select to disable content management.</td>
</tr>
<tr>
<td></td>
<td>■ Deselect (default) to expose content management to users.</td>
</tr>
<tr>
<td>Resource ID</td>
<td>The currently focused resource. This value can be a folder ID or a</td>
</tr>
<tr>
<td></td>
<td>document ID. Click the magnifier icon to open the Pick a Value dialog and</td>
</tr>
<tr>
<td></td>
<td>navigate to the desired folder or file; select the folder or file to set</td>
</tr>
<tr>
<td></td>
<td>the Resource ID value.</td>
</tr>
<tr>
<td></td>
<td>The Resource ID value is checked for coherence with the Connection Name</td>
</tr>
<tr>
<td></td>
<td>and Start Folder Path values, and influences their default values when they</td>
</tr>
<tr>
<td></td>
<td>are not explicitly specified. For example, if Resource ID alone is specified</td>
</tr>
<tr>
<td></td>
<td>the Connection Name value will be inherited from it and the Start Folder Path</td>
</tr>
<tr>
<td></td>
<td>will be either the resource itself for a folder or the parent folder for a</td>
</tr>
<tr>
<td></td>
<td>file.</td>
</tr>
<tr>
<td>Show Documents</td>
<td>Specifies whether the navigation tree shows documents and folders, or</td>
</tr>
<tr>
<td></td>
<td>folders only:</td>
</tr>
<tr>
<td></td>
<td>■ Select (default) to show documents and folders.</td>
</tr>
<tr>
<td></td>
<td>■ Deselect to show folders and hide documents.</td>
</tr>
</tbody>
</table>
The Folder Viewer task flow displays a listing of the contents of a folder in a single pane as a flat listing.

Properties that are unique to the Folder Viewer task flow are shown on the Parameters tab of the Component Properties dialog (Figure 35–6).

**Tip:** For information about accessing the Component Properties dialog, see Section 14.3, "Modifying Component Properties."

### 35.6 Setting Folder Viewer Task Flow Properties

The Folder Viewer task flow displays a listing of the contents of a folder in a single pane as a flat listing.

**See Also:** "Understanding the Folder Viewer Task Flow"

Properties that are unique to the Folder Viewer task flow are shown on the Parameters tab of the Component Properties dialog (Figure 35–6).

### Table 35–4 (Cont.) Document Navigator Task Flow Parameters

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
</table>
| Start Folder Path    | The name of the folder to use as the root folder in the current task flow instance. Click the magnifier icon to open a dialog where you can navigate the connected content repository and select a folder. This is a content-scoping parameter that assists with determining the source and range of content to display in the task flow instance. There is no need to set this value for task flows that display the content of the current portal's default root folder. But it is useful, for example, when you want the start folder to be other than a portal's default root folder and when you want to display content from another portal. Example:  
  - /Enterprise Libraries/monty/Public  
  - /Enterprise Libraries/Proj_X/Specs  
  You can specify an EL expression to set this value. If you need EL assistance, an application developer can provide an EL expression; see the "Expression Language Expressions" appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper. Default: The root folder of the content repository configured with the specified connection for the current portal. |
Figure 35–6  Folder Viewer Task Flow Properties

For information about the properties on the other tabs, which are common to all WebCenter Portal components, see Section 14.3, "Modifying Component Properties."

35.6.1 Folder Viewer Task Flow Parameters

Table 35–5 describes the parameters that are unique to the Folder Viewer task flow.

Table 35–5  Folder Viewer Task Flow Parameters

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Connection Name</td>
<td>The name of the content repository connection. If no value is selected from</td>
</tr>
<tr>
<td></td>
<td>the list, the default connection specified by the system administrator is</td>
</tr>
<tr>
<td></td>
<td>used. For information about configuring content repository connections, see</td>
</tr>
<tr>
<td></td>
<td>the &quot;Registering Content Repositories&quot; section in Administering Oracle Web-</td>
</tr>
<tr>
<td></td>
<td>Center Portal.</td>
</tr>
<tr>
<td></td>
<td>Default: The connection selected as default in the Create Content Repository</td>
</tr>
<tr>
<td></td>
<td>Repository Connection dialog box, which can be changed by the administrator.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> While the Documents task flows allow specifying a different</td>
</tr>
<tr>
<td></td>
<td>Content Server connection, iFraming is supported only for the default</td>
</tr>
<tr>
<td></td>
<td>Content Server connection. Therefore, you cannot specify a non-default</td>
</tr>
<tr>
<td></td>
<td>Content Server connection if the Documents task flows added to the portal</td>
</tr>
<tr>
<td></td>
<td>will use iFrames to display file content, such as PDF files.</td>
</tr>
</tbody>
</table>
### Table 35–5  (Cont.) Folder Viewer Task Flow Parameters

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
</table>
| **Features Off** | A list of disabled features for the task flow. Use commas or spaces to separate items. For a list of valid values and their uses, see Section 35.15, "Features Off Property Values.”

Example:
$({'search, advancedSearch, clipboard, rename, newfolder, upload, checkin, checkout, editoffice, edithtml, delete, sidebars, history'})

**Page Size**

The maximum number of rows to show in the task flow. If the listing of folders and files in the task flow is larger than the specified number of rows, the task flow displays a scroll bar. Default: 27

Typical scenarios where you may wish to alter this value are:
- The majority of end users have bigger screens, allowing for the display of more rows.
- You want to fit this task flow into a smaller area of a page.

**Note:** If you set **Page Size** to a value that is too big for the size of the screen, the end user will experience difficulty coordinating the task flow scroll bar with the application scroll bar.

**Read Only**

Specifies whether to disable and hide all content management operations:
- Select to disable content management.
- Deselect (default) to expose content management to users.

**Resource ID**

The currently focused resource to display in the task flow. This value can be a folder ID or a document ID. Click the magnifier icon to open the Pick a Value dialog and navigate to the desired folder or file; select the folder or file to set the **Resource ID** value.

The **Resource ID** value is checked for coherence with the **Connection Name** and **Start Folder Path** values, and influences their default values when they are not explicitly specified. For example, if **Resource ID** alone is specified, the **Connection Name** value will be inherited from it and the **Start Folder Path** will be either the resource itself for a folder or the parent folder for a file.

**Show Folders**

Specifies whether the navigation tree shows documents and folders, or documents only:
- Select (default) to show folders and documents.
- Deselect to show documents and hide folders.
35.7 Setting Recent Documents Task Flow Properties

The Recent Documents task flow displays a listing of the most recently created or modified files by the current user, when the connected content repository is Content Server.

**See Also:** "Understanding the Recent Documents Task Flow"

Properties that are unique to the Recent Documents task flow are shown on the **Parameters** tab of the Component Properties dialog (Figure 35–7).

**Tip:** For information about accessing the Component Properties dialog, see Section 14.3, "Modifying Component Properties."
For information about the properties on the other tabs, which are common to all WebCenter Portal components, see Section 14.3, “Modifying Component Properties.”

### 35.7.1 Recent Documents Task Flow Parameters

Table 35–6 describes the parameters that are unique to the Recent Documents task flow.

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
</table>
| Connection Name   | The name of the content repository connection. If no value is selected from the list, the default connection specified by the system administrator is used. For information about configuring content repository connections, see the "Registering Content Repositories" section in Administering Oracle WebCenter Portal.  
Default: The connection selected as default in the Create Content Repository Connection dialog box, which can be changed by the administrator.  
**Note:** While the Documents task flows allow 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 Documents task flows added to the portal will use iFrames to display file content, such as PDF files. |
Setting Recent Documents Task Flow Properties

Space
(Used in WebCenter Portal only)
The name of a portal that is the source of the recently created or modified documents listed in the task flow. Valid values are:

- no value or ${null} (default): Displays documents for the entire connected content repository.
- Display name or ID of a specific portal: Displays documents in that portal.
- ${'all'}: Displays documents from any portal, excluding non-portal documents.

Last Modified After
A filtering value to limit the display of task flow content to folders and files last modified after a specified date and time. If no value is entered, then content modified in the last three months is shown. Click the magnifier icon to open a dialog where you can select the date from a calendar.

The value uses the ISO 8601 format:

```
yyyy-mm-ddThh:mm:ss.sssTZD
```

Example:

```
2010-11-17T18:24:36.000+01.00
```

This parameter is available for contextual wiring. For more information, see Chapter 19, "Wiring Pages, Task Flows, Portlets, and ADF Components."

Last Modified Before
A filtering value to limit the display of task flow content to folders and files modified before a specified date and time. If no value is entered, then no such filtering is applied. Click the magnifier icon to open a dialog where you can select the date from a calendar.

The value uses the ISO 8601 format:

```
yyyy-mm-ddThh:mm:ss.sssTZD
```

Example:

```
2010-11-17T18:24:36.000+01:00
```

This parameter is available for contextual wiring. For more information, see Chapter 19, "Wiring Pages, Task Flows, Portlets, and ADF Components."

Last Modifier
A filtering value to limit the display of task flow content to folders and files last modified by a particular user. Enter the user name as specified by the user login credentials. Only one user name may be entered. If no value is entered, then all modified documents are shown.

Example: ${'monty'}

This parameter is available for contextual wiring. For more information, see Chapter 19, "Wiring Pages, Task Flows, Portlets, and ADF Components."

Maximum Documents
The maximum number of files to show. If no value or 0 is entered, then up to 10 of the most recently accessed documents are shown.

Example: ${10}

Note that there is no single quote surrounding the value.

Default: ${null}

---

**Table 35–6 (Cont.) Recent Documents Task Flow Parameters**

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Space</td>
<td>(Used in WebCenter Portal only) The name of a portal that is the source of the recently created or modified documents listed in the task flow. Valid values are:</td>
</tr>
<tr>
<td></td>
<td>- no value or ${null} (default): Displays documents for the entire connected content repository.</td>
</tr>
<tr>
<td></td>
<td>- Display name or ID of a specific portal: Displays documents in that portal.</td>
</tr>
<tr>
<td></td>
<td>- ${'all'}: Displays documents from any portal, excluding non-portal documents.</td>
</tr>
<tr>
<td>Last Modified After</td>
<td>A filtering value to limit the display of task flow content to folders and files last modified after a specified date and time. If no value is entered, then content modified in the last three months is shown. Click the magnifier icon to open a dialog where you can select the date from a calendar. The value uses the ISO 8601 format:</td>
</tr>
<tr>
<td></td>
<td><code>yyyy-mm-ddThh:mm:ss.sssTZD</code></td>
</tr>
<tr>
<td></td>
<td>Example: <code>2010-11-17T18:24:36.000+01.00</code></td>
</tr>
<tr>
<td></td>
<td>This parameter is available for contextual wiring. For more information, see Chapter 19, &quot;Wiring Pages, Task Flows, Portlets, and ADF Components.&quot;</td>
</tr>
<tr>
<td>Last Modified Before</td>
<td>A filtering value to limit the display of task flow content to folders and files modified before a specified date and time. If no value is entered, then no such filtering is applied. Click the magnifier icon to open a dialog where you can select the date from a calendar. The value uses the ISO 8601 format:</td>
</tr>
<tr>
<td></td>
<td><code>yyyy-mm-ddThh:mm:ss.sssTZD</code></td>
</tr>
<tr>
<td></td>
<td>Example: <code>2010-11-17T18:24:36.000+01:00</code></td>
</tr>
<tr>
<td></td>
<td>This parameter is available for contextual wiring. For more information, see Chapter 19, &quot;Wiring Pages, Task Flows, Portlets, and ADF Components.&quot;</td>
</tr>
<tr>
<td>Last Modifier</td>
<td>A filtering value to limit the display of task flow content to folders and files last modified by a particular user. Enter the user name as specified by the user login credentials. Only one user name may be entered. If no value is entered, then all modified documents are shown. Example: <code>${'monty'}</code></td>
</tr>
<tr>
<td></td>
<td>This parameter is available for contextual wiring. For more information, see Chapter 19, &quot;Wiring Pages, Task Flows, Portlets, and ADF Components.&quot;</td>
</tr>
<tr>
<td>Maximum Documents</td>
<td>The maximum number of files to show. If no value or 0 is entered, then up to 10 of the most recently accessed documents are shown. Example: <code>${10}</code></td>
</tr>
<tr>
<td></td>
<td>Note that there is no single quote surrounding the value. Default: <code>${null}</code></td>
</tr>
</tbody>
</table>
Setting Document Viewer Task Flow Properties

35.8 Setting Document Viewer Task Flow Properties

The Document Viewer task flow displays a preview of an individual file in the default template for its file type.

Parameter Description

Most Recent First
- ${true} (default): Most recent documents listed first.
- ${false}: Oldest documents listed first.

"TZ" is the time zone indicator. If the time being described is in UTC (Coordinated Universal Time), then the time zone indicator is "Z". If the time is from any other time zone, then TZ describes the offset from UTC of the time zone. For example, if the time is in California in December (Pacific Standard Time, PST), then the TZ indicator would be "-08:00".

For information about the properties on the other tabs, which are common to all WebCenter Portal components, see Section 14.3, “Modifying Component Properties.”

Table 35–6 (Cont.) Recent Documents Task Flow Parameters

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Most Recent First</td>
<td>Specifies the sort order of files in the task flow:</td>
</tr>
<tr>
<td></td>
<td>- ${true} (default): Most recent documents listed first.</td>
</tr>
<tr>
<td></td>
<td>- ${false}: Oldest documents listed first.</td>
</tr>
</tbody>
</table>

Tip: For information about accessing the Component Properties dialog, see Section 14.3, “Modifying Component Properties.”
35.8.1 Document Viewer Task Flow Parameters

Table 35–7 describes the parameters that are unique to the Document Viewer task flow.

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Features Off</td>
<td>A list of disabled features for the task flow. Use commas or spaces to separate items. For a list of valid values and their uses, see Section 35.15, &quot;Features Off Property Values.&quot;</td>
</tr>
</tbody>
</table>
|                 | Example:                                                                                           
|                 | ${'search, advancedSearch, clipboard, rename, newfolder, upload, checkin, checkout, editoffice, edithtml, delete, sidebars, history'}                                                                        |
| Initial Sidebar | Specifies the tabbed pane to have initial focus in the Document Viewer. Valid values are:                                                              |
|                 | • ${'comments'} (default). Displays the Comments pane (see the "Commenting on Items" section in Using Oracle WebCenter Portal).                                                                                   |
|                 | • ${'tags'}. Displays the Tags pane (see the "Working with Tags" section in Using Oracle WebCenter Portal).                                                                                                     |
|                 | • ${'history'} (default). Displays the History pane (see the "Viewing and Deleting File Version History" section in Using Oracle WebCenter Portal).                                                                 |
|                 | • ${'docInfo'}. Displays the Info pane (see the "Working with Folder and File Properties" section in Using Oracle WebCenter Portal).                                                                            |
|                 | • ${'links'}. Displays the Links pane (see the "Managing Document Links" section in Using Oracle WebCenter Portal).                                                                                           |
|                 | • ${'recommendations'}. Displays the Recommendations pane (see the "Viewing Document Recommendations" section in Using Oracle WebCenter Portal)                                                               |
|                 | • ${'autovue'}. When Oracle AutoVue is installed, displays the AutoVue pane showing the AutoVue markup for the current document in a table of hyperlinked markup names (see the "Collaborating on Documents Using Oracle AutoVue" section in Using Oracle WebCenter Portal). |
| Note            | Values are case-sensitive.                                                                          |
| Item ID         | The ID of the document to display in the Document Viewer.                                                                                           |
| Read Only       | Specifies whether to disable and hide all content management operations:                                                                           |
|                 | • Select to disable content management.                                                              |
|                 | • Deselect (default) to expose content management to users.                                           |

35.9 Setting Document Mini Properties Task Flow Properties

The Document Mini Properties task flow displays the basic properties of a selected file in a read-only view. This choice is available for all file types.

See Also:

- Understanding the Document Mini Properties Task Flow
- Adding a Selected Folder or File to a Page
- "Working with File Properties" in Using Oracle WebCenter Portal
Properties that are unique to the Document Mini Properties task flow are shown on the Parameters tab of the Component Properties dialog (Figure 35–9).

**Tip:** For information about accessing the Component Properties dialog, see Section 14.3, "Modifying Component Properties."

Figure 35–9  Document Mini Properties Task Flow Properties

For information about the properties on the other tabs, which are common to all WebCenter Portal components, see Section 14.3, "Modifying Component Properties."

### 35.9.1 Document Mini Properties Task Flow Parameters

Table 35–8 describes the parameters that are unique to the Document Mini Properties task flow.

**Table 35–8  Document Mini Properties Task Flow Parameters**

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resource ID</td>
<td>The ID of the current document for which to display basic properties.</td>
</tr>
</tbody>
</table>

### 35.10 Setting Document Properties Task Flow Properties

The Document Properties task flow displays both Basic and Advanced properties of a selected file, along with an Edit button to modify property values. This choice is available for all file types.
Properties that are unique to the Document Properties task flow are shown on the Parameters tab of the Component Properties dialog (Figure 35–10).

Tip: For information about accessing the Component Properties dialog, see Section 14.3, "Modifying Component Properties."

Figure 35–10 Document Properties Task Flow Properties

Table 35–9 describes the parameters that are unique to the Document Properties task flow.

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item ID</td>
<td>The ID of the document for which to display properties.</td>
</tr>
</tbody>
</table>
35.11 Setting Document Version History Task Flow Properties

The Document Version History task flow displays a list of versions of a selected file in a read-only view. This choice is available for all file types.

See Also:
- Understanding the Document Version History Task Flow
- Adding a Selected Folder or File to a Page
- "Viewing and Deleting File Version History" in Using Oracle WebCenter Portal

Properties that are unique to the Document Version History task flow are shown on the Parameters tab of the Component Properties dialog (Figure 35–11).

Tip: For information about accessing the Component Properties dialog, see Section 14.3, "Modifying Component Properties."
Figure 35–11  Version History Task Flow Properties

![Version History Task Flow Properties](image)

Table 35–10  Document Version History Task Flow Parameters

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
</table>
| Horizontal Layout| Specifies the layout orientation for the version history information:  
  ▪ Deselect (default) for vertical orientation (see Figure 34–34, "Version History Task Flow for File: Vertical Layout (Horizontal Layout property deselected (default))").  
  ▪ Select for horizontal orientation (see Figure 34–35, "Version History Task Flow for File: Horizontal Layout property selected"). |
| Item ID          | The ID of the document for which to display version history.                                                                                   |
| Read Only        | Specifies whether to disable and hide all content management operations:  
  ▪ Select to disable content management.  
  ▪ Deselect (default) to expose content management to users.                                                                                   |
35.12 Setting Document Link Component Properties

The Link component displays the file name of a selected file as a link on the page.

See Also: "Adding a Selected Folder or File to a Page"

Properties that are unique to the Link component are shown on the Display Options tab of the Component Properties dialog (Figure 35–12).

Tip: For information about accessing the Component Properties dialog, see Section 14.3, "Modifying Component Properties."

Figure 35–12 Link Component Properties

Table 35–11 Link Component Properties: Display Options

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>The display name of the selected file. Default: file name.</td>
</tr>
</tbody>
</table>
35.13 Setting Document Inline Frame Component Properties

The Inline Frame component displays a preview of the file content of a selected file. This choice is available for HTML and TXT types.

See Also: "Adding a Selected Folder or File to a Page"

Properties that are unique to the inline frame component are shown on the Display Options tab of the Component Properties dialog (Figure 35–13).

Tip: For information about accessing the Component Properties dialog, see Section 14.3, "Modifying Component Properties."
For information about the properties on the **Style** tab, which is common to all WebCenter Portal components, see Section 14.3, “Modifying Component Properties.”

### 35.13.1 Document Inline Frame Component Display Options

Table 35–12 describes the properties that are unique to the inline frame component.

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Short Desc</strong></td>
<td>The ALT text to display when the mouse pointer hovers over the component. The default is the name of the document.</td>
</tr>
<tr>
<td><strong>Source</strong></td>
<td>The path to the file relative to the WebCenter Portal application root. Example: /resources/images/cologo.gif</td>
</tr>
</tbody>
</table>
| **Show Component** | Specifies whether to show or hide the inline frame component on the page:  
  - Select (default) to show the inline frame component.  
  - Deselect to hide the inline frame component.  
  Once you hide a component in this way, any child components are also hidden. You can show the component again through Composer Structure view (see Section 12.4.1.3, “About Structure View in Composer”). Right-click the hidden component, and select **Show Component** from the resulting context menu. |
35.14 Setting Document Image Component Properties

The document Image component displays a selected file as an image on a page. This choice is available only for image file types (such as JPG, PNG, and GIF).

See Also: Section 34.2, "About Document Components"

Properties that are unique to the document Image component are shown on the Display Options tab of the Component Properties dialog (Figure 35–14).

Tip: For information about accessing the Component Properties dialog, see Section 14.3, "Modifying Component Properties."

Figure 35–14 Document Image Component Properties

Table 35–13 describes the properties that are unique to the document Image component.

For information about the properties on the Style tab, which is common to all WebCenter Portal components, see Section 14.3, "Modifying Component Properties."

35.14.1 Document Image Component Display Options

Table 35–13 describes the properties that are unique to the document Image component.
The Features Off property provides a means of disabling features for a task flow. Use commas or spaces to separate items. The Features Off property takes the following values:

- advancedSearch - hides the Advanced search link
- autovue - hides the AutoVue pane in the sidebar (at the bottom); the AutoVue pane is available only if Oracle AutoVue is installed
- checkin - hides the Upload New Version menu selection and button
- checkout - hides the Check Out menu selection
- clipboard - hides the Copy, Cut, and Paste menu selections
- close - disables the ability to close document view and return to folder view
- comments - hides the Comments pane in the sidebar (at the bottom)
- delete - hides the Delete menu selection
- download - hides the Download menu selection and button
- dragndrop - disables the ability to use drag-and-drop to copy and move documents and folders
• edithtml - disables the ability to edit wiki and HTML documents in the rich text editor
• editoffice - disables the ability to edit a document using the Microsoft Office applications
• history - hides the History pane in the sidebar (at the bottom)
• html-mode - hides the HTML tab in the rich text editor
• html5-upload - disables the HTML5/flash based upload UI
• ils - disables the ability to control item level security on a file or folder
• likes - disables the ability to like documents and view likes information
• links - hides the Links pane in the sidebar (at the bottom)
• multifile-upload - disables the ability to upload multiple documents from the same screen
• newfolder - disables the ability to create new folders
• newhtml - disables the ability to create new wiki documents
• preview-mode - hides the Preview tab in the rich text editor
• profile-upload - disables the ability to upload documents using content profiles metadata
• properties - disables the ability to view and edit advanced document properties
• recommendations - hides the Recommendations pane in the sidebar (at the bottom)
• related-items - hides the combination of links, tags, and recommendations.
• rename - hides the Rename menu selection
• rich-text-mode - hides the Rich Text tab in the rich text editor
• search - disables the ability to run document searches
• sidebars - hides all document viewer sidebars (the combination of related-items, comments, history, properties)
• social - hides the combination of related-items, likes, and comments, as well as 'send mail' and 'send to activity stream'
• tags - hides the Tags pane in the sidebar (at the bottom)
• title - hides the title section (including location breadcrumbs and move up/back button)
• upload - hides the Upload menu selection and button
• wiki-markup-mode - hides the Wiki Markup tab in the rich text editor
• workflow - disables the ability to view and act on workflow information and to configure workflow settings
This chapter describes how to work with workflows on content in a portal. This chapter includes the following topics:

- **Section 36.1, "About Content Workflows"**
- **Section 36.2, "Assigning a Workflow to a Folder in a Portal"**
- **Section 36.3, "Viewing Files in Workflow"**
- **Section 36.4, "Viewing Workflow Status and File Information"**
- **Section 36.5, "Changing or Deleting a Workflow"**
- **Section 36.6, "Participating in a Workflow"**

---

**Permissions:** To perform the tasks in this chapter, you need the following portal-level permissions:

- Basic Services: Edit Page Access and Structure (standard permissions) or Pages: Edit Pages (advanced permissions)
- Documents permissions (advanced permissions).

For more information about permissions, see **Section 29.1, "About Roles and Permissions for a Portal."**

---

### 36.1 About Content Workflows

Workflows on content in WebCenter Portal are available only when the connected content repository is Content Server and your system administrator has completed the prerequisite configuration.

**See Also:**

- "Configuring and Oracle WebCenter Content Server Repository" in *Administering Oracle WebCenter Portal*
- "Creating a Content Repository Connection Based on the Oracle Content Server Adapter" in *Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper*

A workflow provides for review and approval of a file before it is released to the system. The workflow notifies approvers through mail messages when they have a file to review and approve.

WebCenter Portal includes the following types of workflows:
About Content Workflows

- Internally-defined workflows (discussed in Chapter 57, “Adding Worklists to a Portal”). For example, portal moderators receive a workflow notification in their worklists for portal subscription requests, or when a new file is checked in or uploaded to the portal. The Installation Guide for Oracle WebCenter Portal describes how to install and configure internally-defined workflows for WebCenter Portal.

- Externally-defined workflows enabled in a Workflow server that comes with Oracle SOA Suite (discussed in Chapter 57, “Adding Worklists to a Portal”). The definition of these workflows is an administrative or development task in Oracle SOA Suite.

- Workflows defined on portal folders that reside in Content Server. When a folder is assigned a workflow, any file (including wiki documents and blog posts) checked in or uploaded to that folder must be approved or rejected by one or more assigned approvers. Document task flows, Content Presenter, and the Oracle Workflow Queue portlet from the Universal Content Management Portlet Suite provide access to the workflow-enabled content. This chapter discusses this type of workflow.

See Also: For more information about working with workflows in the Content Server user interface, see the “Using Workflows” chapter in Using Oracle WebCenter Content.

In WebCenter Portal, you can define workflows by assigning a workflow to a folder in a document task flow. Out-of-the-box, WebCenter Portal includes three workflow types that you can assign to portal folders (see Section 36.1.1, “Understanding Workflow Types”). These seeded workflows are available only to a folder in a portal. They are not available to your personal folders in the Home portal.

Once you assign a workflow to a folder in a portal, WebCenter Portal automatically assigns the workflow to every file subsequently checked in or uploaded to the folder. Document task flows, the Content Presenter task flow, and the Oracle Workflow Queue portlet from the Universal Content Management Portlet Suite provide access to the workflow-enabled content.

In all document task flows, any user with privileges to view the contents of a folder that is assigned a workflow can view the files while they are in a workflow, showing the pending changes. Content Presenter allows you to view both the published version of a content item (not showing the pending changes), and the pending changed version while it is in workflow. REST APIs, on the other hand, show only the published version of a file, and do not show the pending changes in unreleased versions of files that are in workflow.

Only workflow approvers can perform actions on a file in workflow (such as upload new version, edit, rename, delete, copy/cut/paste). Non-approvers can view the file, but cannot perform any actions on the file.

The following sections provide conceptual information about workflow on files in WebCenter Portal:

- Section 36.1.1, “Understanding Workflow Types”
- Section 36.1.2, “Understanding Workflow Steps”
- Section 36.1.3, “Understanding Workflow Process”
36.1.1 Understanding Workflow Types

WebCenter Portal provides three built-in workflows for content in a portal. These are single-step workflows that allow one or more approvers to approve, reject, or edit a file in workflow:

- **AllApprover**: A single-step workflow that requires all assigned approvers to approve the document to release it from workflow. Approvers of this workflow type are not able to edit the file while it is in workflow.
- **AllReviewer**: A single-step workflow that requires all assigned approvers to approve the document to release it from workflow. Approvers of this workflow type may optionally edit the file.
- **SingleApprover**: A single-step workflow that requires only one assigned approver to approve the document to release it from workflow. Approvers of this workflow type are not able to edit the file while it is in workflow.

**Note**: If an assigned approver in an AllReviewer workflow uploads a new version of the document or edits the document, it is automatically approved by that approver.

**Note**: The seeded workflows are available only to a folder in a portal. They are not available to your personal folders in the Home portal.

For more information about configuring Content Server to enable the built-in workflows, see the "Enabling the WebCenterConfigure Component" section in *Administering Oracle WebCenter Portal*.

36.1.2 Understanding Workflow Steps

The three workflows provided with WebCenter Portal (AllApprover, AllReviewer, and SingleApprover) each contain a workflow contribution step and an approval step. Typically, different users will participate in each of the steps.

<table>
<thead>
<tr>
<th>Table 36–1 Workflow Steps</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Step Type</strong></td>
</tr>
<tr>
<td>contribution</td>
</tr>
<tr>
<td>ApprovalStep</td>
</tr>
</tbody>
</table>

36.1.3 Understanding Workflow Process

The workflow process is as follows:

1. A document enters the workflow approval step by exiting the initial contribution step as a result of a new document upload or editing an existing document that was previously uploaded into a workflow-enabled folder. See Section 36.1.2,
"Understanding Workflow Steps."

2. If any approver rejects a revision, it goes back to the most recent contribution step for editing.

3. When approvers approve a revision in the workflow, the content item is released to the system.

36.2 Assigning a Workflow to a Folder in a Portal

With appropriate permissions (the portal moderator, or portal members with Manage Configuration permissions), you can assign a workflow to a folder in a portal when the connected content repository is Content Server. Once you assign a workflow to a portal folder, WebCenter Portal automatically assigns the workflow to every file subsequently checked in or uploaded to the folder.

Out-of-the-box, WebCenter Portal includes three workflow types that you can assign to portal folders (see Section 36.1.1, "Understanding Workflow Types"). These seeded workflows are available only to a folder in a portal. They are not available to your personal folders in the Home portal.

If you create a subfolder in a parent folder that is assigned a workflow, the subfolder automatically inherits the workflow assignment of the parent folder.

To assign a workflow to a folder:

1. On the Documents page or in a Document Explorer, Document Manager, or Folder Viewer task flow, create a new folder, or click in the row of an existing folder.

2. Click the View menu, and select Details, or right-click to display the folder’s context menu, and select Details.

   The Basic properties pane for the folder opens (Figure 36–1).

![Folder Properties](image)

3. From the File menu, select Workflow Settings.

4. In the Workflow Settings dialog, select from the Workflow Name list (Figure 36–2) to apply a workflow to the folder.
Assigning a Workflow to a Folder in a Portal

For information about the out-of-the-box workflows, see Section 36.1.1, "Understanding Workflow Types." Additional workflows may be listed if they have been defined in Content Server and added by the system administrator. For more information about defining workflows, see the "Using Workflows" chapter in Using Oracle WebCenter Content.

5. After selecting a workflow name, click **Add Approvers** (Figure 36–3).

6. In the Select User dialog, search for and select a user to whom to assign the workflow.

   **Note:** The selections in the **Workflow Name** list are preceded with the WebCenter Portal installation name used during the installation procedure.

   **Note:** WebCenter Portal does not support group names as approvers.

   **Note:** To select multiple users in the Select User dialog, your search result must include all users that you want to select, then you can use Ctrl+click to selectively create the list of approvers. To list all users in one search result, use a generic search string. If you enter a second search string and select users in that search result, your existing list of approvers in the Select User dialog is replaced.

   Click **OK**.
7. In the Workflow Settings dialog, optionally click Add Approvers again to add more approvers, then click OK to save the workflow.

Every assigned approver receives a mail message to notify them that they are assigned to the workflow as document approvers. The format and contents of the mail message are controlled by how the system administrator installed and configured the Content Server (see the "Managing Mail" chapter in Administering Oracle WebCenter Portal).

With a workflow established on a folder in a portal, WebCenter Portal automatically enters every file that is subsequently checked in or uploaded to the folder into workflow. If you want to assign the workflow to a file that was already in the folder prior to the workflow being defined, you can save the file to your local file system, delete the file from the portal, then upload the file into the folder again so that the file can inherit the workflow properties of the folder.

A workflow icon alongside a file in a document task flow indicates that the file is assigned to a workflow (Figure 36–4). For more information, see Section 36.3, "Viewing Files in Workflow." Note that the only way to determine if a folder has a workflow defined on it is to view its workflow settings, as described in the steps above.

![Workflow Icon](image)

36.3 Viewing Files in Workflow

You can view files in workflow and view workflow details in a document task flow, Content Presenter task flow, or in an Oracle Workflow Queue portlet:

- Section 36.3.1, "Viewing Workflow Files in a Document Task Flow"
- Section 36.3.2, "Viewing Workflow Files in a Content Presenter Task Flow"
- Section 36.3.3, "Viewing Workflow Files in a Workflow Queue"

**Note:** Only workflow approvers can perform actions on a file in workflow (such as upload new version, edit, rename, delete, copy/cut/paste). Non-approvers can view the file, but cannot perform any actions on the file.

36.3.1 Viewing Workflow Files in a Document Task Flow

On the Documents page or in a document task flow in a portal, a workflow icon alongside a file in a document task flow indicates that the file is assigned to a workflow (Figure 36–5).
To view a file that is in workflow:

1. Click the file name to open the file in the Document Viewer.

   The Document Viewer displays a notification that the file is in workflow. If you are assigned as an approver of the workflow, you will see controls that allow you to approve, reject, or view details of the file (Figure 36–6). The preview of the file shows the pending changes.

2. To view further details about the workflow, if you are an approver, click Details to display the workflow information in Content Server (Figure 36–7).

### Figure 36–5  File in Workflow Showing Workflow Icon

![File in Workflow Showing Workflow Icon](image_url)

**Note:** The Documents page is exposed in a portal only with Content Server 11g. If the connected content repository is Content Server 10g, you can create a page in a portal and add document task flows to the page (see Section 34.4, “Adding a Document Task Flow to a Page”).
3. If you are an approver or reviewer for the file, click Approve or Reject to indicate the result of your review of the file. These links are active only when the file is pending approval. If you reject the file, enter the justification for your rejection. For other ways to approve or reject a file, see Section 36.6.1, "Approving or Rejecting a File in Workflow."
When a file in workflow is approved, it is released from workflow, and the workflow icon no longer displays for the file (Figure 36–8). If you edit the file and make further changes, it will return to workflow.

Figure 36–8 File Released From Workflow Showing No Workflow Icon

When a file in workflow is rejected, it remains in workflow, returning to the contribution step. It must be updated by the file owner for the Approve and Reject controls to display.

36.3.2 Viewing Workflow Files in a Content Presenter Task Flow

You can view content items displayed in Content Presenter while they are in a workflow, including Site Studio contributor data files displayed in a Site Studio region template. As long as the content item has at some point had Released status in Content Server, you can display the content item in Content Presenter. Then, if a revision of the content item is pending in workflow, Content Presenter allows approvers for the content item to toggle between the published version and the version in workflow in 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 Section 33.2, "Adding a Content Presenter Task Flow to a Page"), selecting the file that is in workflow.

2. To view the current workflow state of the file in Content Presenter, view the page in edit mode (Figure 36–9), or view the file in in-context edit (contributor) mode (Figure 36–10).

Content Presenter displays workflow controls to show that the file is in workflow. The initial view of the file shows the published version of the file.

Notes:

- If the file is configured in Content Server to require an esignature, you will not be able to approve it in WebCenter Portal. To provide an esignature with approval, you must approve using Content Server. For more information, see the “Using Workflows” chapter in Using Oracle WebCenter Content.

- To edit a file in workflow, the file must be associated with a workflow that contains the step review the current revision or create new revisions and you must be an approver for the workflow. The seeded workflow that meets these requirements is AllReviewer.
3. To view further details about the workflow, click **Details** to display the workflow information in Content Server (including workflow name, steps performed, action performed, date of action, and who performed the action).

**Note:** To enable the availability of the workflow **Details** link in the Document Viewer preview pane, **both** of the following two requirements must be met:

- You must access the 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 the "Configuring Content Server" section 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 the "Registering Content Repositories" section in *Administering Oracle WebCenter Portal*. To set `webContextRoot` through WLST, see the "createJCRContentServerConnection" and "setJCRContentServerConnection" sections in the *WebLogic Scripting Tool Command 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 36–11), or in-context edit (contributor) mode (Figure 36–12). These links are active only when the file is pending approval. If you reject the file, enter the justification for your rejection. For other ways to approve or reject a file, see
Section 36.6.1, "Approving or Rejecting a File in Workflow."

**Note:** If the file is configured in Content Server to require an esignature, you will not be able to approve it in WebCenter Portal. To provide an esignature with approval, you must approve using Content Server. For more information, see the "Using Workflows" chapter in *Using Oracle WebCenter Content*.

**Figure 36–11**  
Page Editor: Preview File in Workflow to Approve or Reject in Content Presenter

Currently viewing pending version  View published version  Approve  Reject

These are the meeting minutes from the June 2013 meeting of the Philatelists club. The following members were present: Karen, Ari, Ella, Bruce, Noah, and Charlotte. We discussed the following topics:

- The new Philatelists portal
- Upcoming Philatelists conferences
- New stamps coming out this year

**Figure 36–12**  
In-Context Edit (Contributor) Mode: Preview File in Workflow to Approve or Reject in Content Presenter

Currently viewing pending version  View published version  Approve  Reject

These are the meeting minutes from the June 2013 meeting of the Philatelists club. The following members were present: Karen, Ari, Ella, Bruce, Noah, and Charlotte. We discussed the following topics:

- The new Philatelists portal
- Upcoming Philatelists conferences
- New stamps coming out this year

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.
36.3.3 Viewing Workflow Files in a Workflow Queue

If you have Content Portlet Suite installed, you can add the Oracle Workflow Queue portlet to a page to list the files in workflow, along with details about each workflow. For information about how to deploy Content Portlet Suite, see the Deployment Guide for Content Portlet Suite.

To add the Oracle Workflow Queue portlet to a page:

1. Open the page in edit mode (see Section 12.4.3, "Opening a Page in the Page Editor (Composer)").

2. Click the view switcher to Web and click the Design tab to display the page in Design view, showing the inline resource catalog.

3. Locate the Oracle Workflow Queue portlet in the resource catalog.

   **Tip:** The presence or location of the Oracle Workflow Queue portlet depends on how the resource catalog is configured. For example, in the Default Portal Catalog, click Portlets, then <Host> Portlets to locate the Oracle Workflow Queue portlet.

4. Click Add next to the Oracle Workflow Queue portlet to add it to the page, then Close the resource catalog.

   On the page, the Oracle Workflow Queue portlet (Figure 36–13) displays a list of all the files in workflow assigned to you to approve or reject.

**Figure 36–13  Oracle Workflow Queue Portlet**

<table>
<thead>
<tr>
<th>Title</th>
<th>Workflow Info</th>
<th>Last Action</th>
<th>Actions</th>
<th>Info</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lincoln_stamps update.doc</td>
<td>ApprovalStep</td>
<td></td>
<td>Approve / Reject</td>
<td></td>
</tr>
<tr>
<td>adobe.htm</td>
<td>ApprovalStep</td>
<td>UNDO_CHECKOUT</td>
<td>Approve / Reject</td>
<td></td>
</tr>
<tr>
<td>d.bxt</td>
<td>contribution</td>
<td>REJECT</td>
<td></td>
<td></td>
</tr>
<tr>
<td>b.bxt</td>
<td>ApprovalStep</td>
<td></td>
<td>Approve / Reject</td>
<td></td>
</tr>
<tr>
<td>s.bxt</td>
<td>ApprovalStep</td>
<td></td>
<td>Approve / Reject</td>
<td></td>
</tr>
</tbody>
</table>

In the Oracle Workflow Queue portlet, you can perform the following actions if you have appropriate permissions:

- In the Title column, click a file name to open it in its native application.
- In the Workflow Info column, click a link to display the Workflow Step Information pane, which provides steps required to complete the workflow, the current step, the number of approvals required, and the remaining reviewers. For more information, see Section 36.4.1, "Viewing Detailed Workflow Status."
- In the Actions column, click Approve or Reject to indicate the result of your review of the file. These links are active only when the file is pending approval. If you reject the file, enter the justification for your rejection. For other ways to approve or reject a file, see Section 36.6.1, "Approving or Rejecting a File in Workflow."
36.4 Viewing Workflow Status and File Information

As an approver or owner of a file in workflow, you may want to get more information about the current state of the workflow, details about the file itself, or perform file management actions to update or share the file to advance its approval:

- Section 36.4.1, "Viewing Detailed Workflow Status"
- Section 36.4.2, "Viewing Content Information and Actions"

36.4.1 Viewing Detailed Workflow Status

To view the details of the workflow status of a file:

1. Go to the Oracle Workflow Queue portlet that lists the file.

   To add an Oracle Workflow Queue portlet to a page, see Section 36.3.3, "Viewing Workflow Files in a Workflow Queue."

2. In the Workflow Info column, click the workflow step link to display the Workflow Step Information pane (Figure 36–14), which includes the steps required to complete the workflow, the current step, the number of approvals required, and the remaining reviewers. For information about workflow steps, see Section 36.1.2, "Understanding Workflow Steps."

![Workflow Step Information](figure.png)

Note: If the file is configured in Content Server to require an esignature, you will not be able to approve it in WebCenter Portal. To provide an esignature with approval, you must approve using Content Server. For more information, see the "Using Workflows" chapter in Using Oracle WebCenter Content.
3. Click **Back** to return to the Oracle Workflow Queue portlet.

### 36.4.2 Viewing Content Information and Actions

To display a Content Info pane that provides details about a file in workflow and perform file management actions to update or share the file to advance its approval:

1. Go to the Oracle Workflow Queue portlet that lists the file.

   To add an Oracle Workflow Queue portlet to a page, see Section 36.3.3, "Viewing Workflow Files in a Workflow Queue."

2. In the **Info** column, click the **Content Information** icon to display the Content Info pane (Figure 36–15), which provides access to actions you can perform, file metadata information, and revision history.

![Figure 36–15  Content Info Pane](image)

3. Optionally, from the **Actions** list, select any of the following actions:

   - **Check Out** to check the file out so that you can lock it from changes by other contributors while you are making updates.

   - **Update** to display the Info Update Form, where you can update editable metadata of the file without creating a new revision of the file. Only the portal moderator, portal members with Manage Configuration permissions, or file owners can edit the file properties.

   - **Check in Similar** to display the Content Check In Form, where you can update editable metadata of the file and check the file in to Content Server.
Only the portal moderator, portal members with Manage Configuration permissions, or file owners can edit the metadata properties.

- **Send link by e-mail** to open your e-mail application with a new message that contains a link to the URL of the web-viewable file, which you can mail to other users with requests for input or review to further the approval of the file.

4. Click **Back** to return to the Oracle Workflow Queue portlet.

### 36.5 Changing or Deleting a Workflow

With appropriate permissions (the portal moderator, or portal members with Manage Configuration permissions), you can change or delete the workflow assigned to a folder in a document task flow when the connected content repository is Content Server.

To change or delete the workflow assigned to a folder:

1. On the **Documents** page or in a document task flow in a portal, click in the row of the folder.

   ```
   Note: The Documents page is exposed in a portal only with Content Server 11g. If the connected content repository is Content Server 10g, you can create a page in a portal and add document task flows to the page (see Section 34.4, "Adding a Document Task Flow to a Page").
   ```

2. Follow the steps in Section 36.2, "Assigning a Workflow to a Folder in a Portal":
   - To change the workflow, select a different workflow from the **Workflow Name** list, and optionally add or delete approvers.
   - To delete the workflow, select `<None>` from the **Workflow Name** list.

   ```
   Note: If you change or delete the workflow assigned to a folder, the files that were previously in that folder remain assigned to the prior workflow. Only files that are subsequently checked in or uploaded to the folder inherit the new workflow settings.
   ```

### 36.6 Participating in a Workflow

The following sections describe how to work with a file through the workflow process:

- **Section 36.6.1, "Approving or Rejecting a File in Workflow"
- Section 36.6.2, "Working with a Rejected Revision"

#### 36.6.1 Approving or Rejecting a File in Workflow

As an assigned approver for a workflow, you will need to review and either approve or reject a file to which you are assigned. A file is released from workflow when it is approved in accordance with its workflow type (see Section 36.1.1, "Understanding Workflow Types").

To approve or reject a file in workflow:

1. View the files for which you are an assigned approver in either of the following ways:
Participating in a Workflow

- In the Document Viewer preview pane, as described in Section 36.3.1, "Viewing Workflow Files in a Document Task Flow."
- In a Content Presenter task flow, as described in Section 36.3.2, "Viewing Workflow Files in a Content Presenter Task Flow."
- In an Oracle Workflow Queue portlet, as described in Section 36.3.3, "Viewing Workflow Files in a Workflow Queue."

2. Click **Approve** or **Reject** to indicate the result of your review of the file. These links are active only when the file is pending approval. If you reject the file, enter the justification for your rejection.

---

**Note:** If the file is configured in Content Server to require an esignature, you will not be able to approve it in WebCenter Portal. To provide an esignature with approval, you must approve using Content Server. For more information, see the "Using Workflows" chapter in *Using Oracle WebCenter Content*.

---

When a file in workflow is approved, it is released from workflow, and the workflow icon no longer displays for the file (Figure 36–16). If you edit the file and make further changes, it will return to workflow.

**Figure 36–16  File Released From Workflow Showing No Workflow Icon**

When a file in workflow is rejected, it remains in workflow and returns to the original submitter in the contribution workflow step. The contributor can then revise the file and save it. After saving, the file automatically moves back into the workflow approval step again to be approved or rejected by assigned approvers.

36.6.2 Working with a Rejected Revision

If a file in workflow is rejected, it remains in workflow and returns to the original submitter in the contribution workflow step. The contributor can then revise the file and save it. After saving, the file automatically moves back into the workflow approval step again to be approved or rejected by assigned approvers.
This chapter describes how to enable wiki functionality to allow WebCenter Portal users to create, edit, and manage wiki documents. These tasks, and creating a personal page using the Wiki page style, are available to the knowledge worker and are described in the "Working with Wikis" chapter in Using Oracle WebCenter Portal.

This chapter includes the following topics:

- **Section 37.1, "About Wikis"**
- **Section 37.2, "Prerequisites for Enabling Wiki Functionality"**
- **Section 37.3, "Adding an Existing Wiki to a Portal"**
- **Section 37.4, "Creating a New Wiki In a Portal"**
- **Section 37.5, "Working with Wikis"**
- **Section 37.6, "Use Case Examples"**
37.1 About Wikis

Wikis epitomize the concepts of community and collaboration by allowing all authorized community members to contribute their information to a body of knowledge. Wikis are web pages that offer in-place editing using HTML or a simple mark-up language called wiki mark-up. Users with sufficient permissions on a wiki 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.

Wiki and blog functionality in WebCenter Portal requires that Content Server is the content repository. However, it is important to be aware that wikis and blogs are managed by WebCenter Portal, not by Content Server. Thus, folder settings in Content Server have no effect. For example, specifying a default profile on a 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.

37.2 Prerequisites for Enabling Wiki Functionality

For wikis to be available in WebCenter Portal, the following prerequisites must be met:

- Content Server 11g must be configured as the default content repository for WebCenter Portal. The wiki functionality is not available with Content Server 10g.
Your system administrator can find information about installing and configuring Content Server 11g in the "Managing Content Repositories" chapter in *Administering Oracle WebCenter Portal*.

- A connection to Content Server 11g must be established, as described in the "Configuring Content Repository Connections" section in *Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper*.

- The Documents tool must be enabled for the portal in which you plan to create wiki documents. For information, see Section 39.2, "Enabling and Disabling Tools and Services Available to a Portal."

### 37.3 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. You can expose the wiki in a number of ways: as a link, image, preview, editable view, or non-editable view. See Section 34.3, "Adding a Selected Folder or File to a Page."

- Add a wiki to the portal navigation, where the target wiki can be either editable or not editable by the user. See Section 22.3.3, "Adding Items to a Navigation Model" 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. A wiki added using a Content Presenter task flow will not expose editing controls, whereas a wiki added using a Document Viewer task flow exposes editing controls, which you can customize using the Features Off property of the Document Viewer task flow (see Table 35–7, "Document Viewer Task Flow Parameters").
  - Or, add a content item to the navigation, selecting the wiki document from the connected content repository. A wiki added in this way is view-only, with no editing controls available to the end user.

### 37.4 Creating a New Wiki In a Portal

In WebCenter Portal, you can create a wiki using either of the following methods:


- Create a page using the Wiki page style, which 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 the "Creating a Personal Page" section in *Using Oracle WebCenter Portal* and select Wiki as the page style.
  - A portal page in a portal, selecting Wiki as the page style. See Section 12.2.2, "Creating a Page or Subpage in an Existing Portal."
Wikis created using either of the two methods offer the same in-place editing features through the Rich Text Editor (RTE), described in the “Using the Rich Text Editor (RTE)” section in Using Oracle WebCenter Portal.

In both cases, the initial wiki page, containing a default wiki document with default text, looks similar to Figure 37–1.

**Figure 37–1  Default Wiki Document Created Using the Wiki Page Style**

On the Documents page, you can find the newly created wiki document stored in a separate folder for the wiki page under the root folder, as shown in Figure 37–2. Both the folder and the default wiki document share the same name.

### 37.5 Working with Wikis

For information about creating, editing, and managing wikis, see the "Working with Wikis" chapter in Using Oracle WebCenter Portal.

### 37.6 Use Case Examples

Table 37–1 provides solutions to common scenarios for including wikis in your portal, and refers to documentation that provides the information you need.
Table 37–1  Common Wiki Use Cases

<table>
<thead>
<tr>
<th>If I want to ....</th>
<th>What do I need to understand and do?</th>
</tr>
</thead>
</table>
| In my portal navigation, add a link to an existing wiki page in my portal | By default, portal pages are automatically added to the portal navigation when they are created (see Section 12.2.2, "Creating a Page or Subpage in an Existing Portal"). 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 Section 1.3.7, "What Are Pages?"  
If a portal 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 Section 13.9, "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:  
  ■ Edit the portal, click the Add icon, and select 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, Section 13.2, "Adding an Existing Page to the Portal Navigation." |
### Table 37–1  (Cont.) Common Wiki Use Cases

<table>
<thead>
<tr>
<th>If I want to ....</th>
<th>What do I need to understand and do?</th>
</tr>
</thead>
</table>
| 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 page that exists in the connected content repository, outside of your portal:  
- Edit the portal or in portal administration, click the Add icon, and select Link.  
- Set the Path property to the URL of the target 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:  

![Top Navigation Example](image1)  

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:  

![Top Navigation Example](image2)  

**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 copy the value of its Path property (on the Advanced tab of the page properties) into the Path field of the navigation item.
### Table 37–1 (Cont.) Common Wiki Use Cases

<table>
<thead>
<tr>
<th>If I want to ....</th>
<th>What do I need to understand and do?</th>
</tr>
</thead>
</table>
| Add a new wiki page to my portal (make the entire page a wiki) | Either:  
  - Create a new wiki page using the Wiki page style. See Section 12.2.2, "Creating a Page or Subpage in an Existing Portal."  
  - Or, create a wiki document, then add it to a page in a number of ways. See the "Creating a Wiki Document Using the New Wiki Document Action" section in Using Oracle WebCenter Portal and the next row in this table.  
  Tip: To work with wikis, make sure that the Documents tool is enabled. See Section 39.2, "Enabling and Disabling Tools and Services Available to a Portal." See also, Chapter 37, "Adding a Wiki to 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. Use the resource catalog to add the document to the page:  
  - To display an existing document that is already in your portal, open Content Management, then Portal Documents, select the document, and click Add.  
  - To display an existing document that is available in the connected content repository, open Content Management, then All Content. Search for and select the document, and click Add.  
  You can expose the document in a number of ways: as a link, image, preview, editable view (Document Viewer), or non-editable view (Content Presenter). See Section 34.3, "Adding a Selected Folder or File to a Page" and the next two rows in this table. |
### Table 37–1 (Cont.) Common Wiki Use Cases

<table>
<thead>
<tr>
<th>If I want to ....</th>
<th>What do I need to understand and do?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add an existing wiki document to a page in my portal, including editing controls</td>
<td>To allow users to edit the document, add the document in a Document Viewer task flow. See Section 34.3, &quot;Adding a Selected Folder or File to a Page.&quot; You can customize the editing controls that are exposed using the Features Off property of the Document Viewer task flow. See Table 35–7, &quot;Document Viewer Task Flow Parameters&quot;.</td>
</tr>
<tr>
<td>Add an existing wiki document to a page in my portal, without editing controls</td>
<td>To hide document editing controls from users, add the document in a Content Presenter task flow. See Section 34.3, &quot;Adding a Selected Folder or File to a Page.&quot; 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 Section 22.3.3, &quot;Adding Items to a Navigation Model.&quot;</td>
</tr>
<tr>
<td>Move focus to the top of a target wiki document from the default focus at the bottom (Comments tab), removing all tabbed panes at the bottom.</td>
<td>In the page editor (Composer), click the (wrench) icon for the Document Viewer or Content Presenter task flow to open the Component Properties dialog. Add to the Features Off property: sidebars.</td>
</tr>
</tbody>
</table>
This chapter describes how to enable blog functionality to allow WebCenter Portal users to work with blogs and blog posts, and how to add and manage blog task flows. Viewing and managing blog posts, and creating a personal page using the Blog page style, are tasks available to the knowledge worker and described in the "Working with Blogs" chapter in Using Oracle WebCenter Portal.

This chapter includes the following topics:

- Section 38.1, "About Blogs"
- Section 38.2, "Prerequisites for Enabling Blog Functionality"
- Section 38.3, "Creating a New Blog in a Portal"
- Section 38.4, "Working with Blog Task Flows"
### 38.1 About Blogs

Blogs are typically personal records of an individual user's experience and opinions. The word *blog* is a contraction of the term *Web log*. It was coined to describe the online diaries spawned in the late 1990s.

Blogs provide a useful tool for discussing and/or evangelizing any type of idea, strategy, or point of view. Blogs may be projected out to a select group of people or to a wider audience. Typically, each blog contains various blog posts, with the most recently added blog post displayed at the top. Blogs invite readers to comment on the overall concepts.

Wiki and blog functionality in WebCenter Portal requires that Content Server is the content repository. However, it is important to be aware that wikis and blogs are managed by WebCenter Portal, not by Content Server. Thus, folder settings in Content Server have no effect. For example, specifying a default profile on a 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.

### 38.2 Prerequisites for Enabling Blog Functionality

Blog functionality in WebCenter Portal relies on Content Server, the content repository that stores the blogs. For blogs to be available in WebCenter Portal, the following prerequisites must be met:

---

**Permissions:** To perform the tasks in this chapter, you need the following portal-level permissions:

- Manage Security and Configuration or Manage Configuration to enable the Documents tool to allow for blog functionality in a portal.

- Basic Services: Edit Page Access, Structure, and Content (standard permissions) or Pages: Create, Edit, and Delete Pages (advanced permissions) to create a portal page using the Blog page style, edit pages (add blog task flows), 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.

- Assets: Edit Assets (standard permissions) or Navigations: Edit Navigations (advanced permissions) as adding or deleting pages automatically changes the portal navigation.

Note that when a role's portal page permissions are added or revoked, WebCenter Portal does not automatically add or revoke permission to edit portal navigation for the users assigned to that role. Page and assets permissions must be explicitly added or revoked.

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 the "Working with Blogs" chapter in *Using Oracle WebCenter Portal*.

For more information about permissions, see Section 29.1, "About Roles and Permissions for a Portal."
Working with Blog Task Flows

- Content Server 11g must be configured as the default content repository for WebCenter Portal. The blog functionality is not available with Content Server 10g. Your system administrator can find information about installing and configuring Content Server 11g in the "Managing Content Repositories" chapter in Administering Oracle WebCenter Portal.

- A connection to Content Server 11g must be established, as described in the "Configuring Content Repository Connections" section in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

- The Documents tool must be enabled for the portal in which you plan to create a blog. For information, see Section 39.2, "Enabling and Disabling Tools and Services Available to a Portal."

38.3 Creating a New Blog in a Portal

In WebCenter Portal, you can create blogs to group related blog posts. For example, you can group posts by the same author or related topics. Create a blog using either of the following methods:

- Use Blog task flows to expose a customized blog view on a page along with other page components. See Section 38.4, "Working with Blog Task Flows." After blog task flows have been added to a page, users can work with them, as described in the "Working with Blog Posts" section in Using Oracle WebCenter Portal.

- Create a page using the Blog page style, which is a dedicated blog page that can be either:
  - A personal page in the Home portal, selecting Blog as the page style. See the "Creating a Personal Page" section in Using Oracle WebCenter Portal.
  - A portal page in a portal, selecting Blog as the page style. See Section 12.2, "Creating Pages or Subpages in a Portal."

In both cases, the initial blog page you create looks similar to Figure 38–1. For more information, see the "Understanding the Blog Page Style" section in Using Oracle WebCenter Portal.

Figure 38–1 A New Blog Created Using the Blog Page Style

MyBlog

38.4 Working with Blog Task Flows

To understand the differences between the two methods of creating a blog, see Section 38.4.1, "About Blogs."

Instead of creating a dedicated blog page, you may want one or more blogs to appear along with various other components on a page. You can do this by creating a folder for a blog, and then exposing it on a page using a combination of blog task flows.

This section includes the following topics:

- Section 38.4.1, "Understanding the Blog Task Flows"
38.4.1 Understanding the Blog Task Flows

To include a blog on a page, along with other page components, you can use the blog task flows to add one or more elements of a blog to a page in a portal. Table 38–1 describes the blog task flows:

<table>
<thead>
<tr>
<th>Blog Task Flow</th>
<th>Description</th>
<th>Example as Exposed on a Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Archives</td>
<td>Displays a composite list of blogs based on dates.</td>
<td><img src="#" alt="Archives" /> 2013 (2) June (2)</td>
</tr>
<tr>
<td>Banner</td>
<td>Displays a banner for the blog.</td>
<td><img src="#" alt="MyBlog" /></td>
</tr>
</tbody>
</table>
| Blog Main View | Displays a blog or blog post with a default design. | ![MyBlog](#) New Post  
**Philatelists Club?**  
If you are interested in joining the online Philatelists Club, check out my website: www.arisite/philatclub  
Created on Sat 11/13 8:04 PM by Ali Spice - 0 comments |
| Blog Viewer    | Displays a blog or blog post. | ![Philatelists Club?](#) New Post |
| Blog Recent Posts | Displays a list of most recent blog posts. | ![Recent Posts](#)  
Philatelists Club?  
Presidential Stamps |
38.4.2 Creating a Blog Using Blog Task Flows

To add a blog task flow to a page:

1. On the **Documents** page or in a Documents task flow, create a folder under the **Blogs** folder.
2. Right-click the newly created folder, and select **Details** to display the folder properties.
3. From the **Identifier** field, copy the value (**Figure 38–2**).
   This value is the resource ID that uniquely identifies the folder. You will copy this resource ID to the blog task flow properties to expose the folder as a blog.

**Figure 38–2  Resource ID of a Folder**

4. Create a new page (see **Section 12.2.2, "Creating a Page or Subpage in an Existing Portal"**) or opening an existing page in edit mode (see **Section 12.4.3, "Opening a Page in the Page Editor (Composer)"**).

   **Note:** By default, the view switcher is set to **Web** and Composer displays the page in Design view showing the inline resource catalog.

5. Navigate to the section of the resource catalog that provides access to the blog task flows.

   **Tip:** The presence or location of this section depends on how the resource catalog is configured. For example, in the Default Portal Catalog, open the **Social and Communication**, then open the **Blogs** folder to expose the blogs task flows.

6. Click **Add** next to the blog task flow that you want to add to your page (**Figure 38–3**). See **Section 38.4.1, "Understanding the Blog Task Flows."**
The selected blog task flow is added to the page, displaying a message that the resource ID is missing or invalid (Figure 38–4).

7. Click the Edit icon.

8. In the Component Properties dialog, on the Parameters tab, paste the resource ID that you copied in Step 3 into the Resource Id field (Figure 38–5).

For information about the other blog properties that you can set in the Component Properties dialog, see Section 38.4.3, "Setting Blog Task Flow Properties."

9. Click OK.

The new blog task flow is added to the page (Figure 38–6).
After adding a blog task flow, you can perform blog actions provided by the task flow, such as adding blog posts, as described in the “Working with Blog Posts” section in Using Oracle WebCenter Portal.

### 38.4.3 Setting Blog Task Flow Properties

The blog task flows have associated properties, which users with sufficient privileges can access through the Component Properties dialog in Composer.

The following sections provide information about properties of the blog task flows and Blog page style and describe the properties on the Parameters tab for each blog task flow:

- Section 38.4.3.1, "About Blog Task Flow Properties"
- Section 38.4.3.2, "Setting Blog Archives Task Flow Properties"
- Section 38.4.3.3, "Setting Blog Banner Task Flow Properties"
- Section 38.4.3.4, "Setting Blog Main View Task Flow Properties"
- Section 38.4.3.5, "Setting Blog Viewer Task Flow Properties"
- Section 38.4.3.6, "Setting Recent Posts Task Flow Properties"

#### 38.4.3.1 About Blog Task Flow Properties

The properties on the Parameters tab of the Component Properties dialog control the default task flow content. These properties are unique to the task flow type. For some task flows, parameters on this tab facilitate the wiring of the task flow to page parameters and page definition variables. For more information, see Chapter 19, "Wiring Pages, Task Flows, Portlets, and ADF Components."

Changes to the properties on the Display Options, Style, and Content Style tabs affect the appearance and behavior of the task flow for all users. These properties are common to all task flows. For more information, see Section 14.3, "Modifying Component Properties."

The contents of the Events tab depend on the events supported by the task flow. For more information, see Section 14.3.7, "Working with Component Contextual Events."

All properties on the Parameters and Display Options tabs provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the Edit icon next to a property field to open the editor. For more information about using the editor and for descriptions of common EL expressions, see Appendix A, "WebCenter Portal Pretty URLs."
If you need EL assistance, an application developer can provide an EL expression; see the "Expression Language Expressions" appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

38.4.3.2 Setting Blog Archives Task Flow Properties

The blog Archives task flow displays a composite list of blogs based on dates. Properties that are unique to the Archives task flow are shown on the **Parameters** tab of the Component Properties dialog (Figure 38–7).

**Tip:** For information about accessing the Component Properties dialog, see Section 14.3, "Modifying Component Properties."

For information about the properties on the other tabs, which are common to all WebCenter Portal components, see Section 14.3, "Modifying Component Properties."
38.4.3.2.1 Blog Archives Task Flow Parameters  Table 38–2 describes the parameters that are unique to the blog Archives task flow.

**Table 38–2  Blog Archives Task Flow Parameters**

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
</table>
| Resource Id     | The resource ID of the blog folder (see Figure 38–2), which can be specified in the following formats  
|                 | connection_name/path_to_folder  
|                 | Where, connection_name is the name of the Oracle Content Server connection, and path_to_folder is the path to the folder on Oracle Content Server that you want to expose as a blog.  
|                 | connection_name#dCollectionId:collectionId  
|                 | Where, connection_name is the name of the Oracle Content Server connection, and dCollectionId is the collection ID of the folder on Oracle Content Server that you want to expose as a blog. |

38.4.3.3 Setting Blog Banner Task Flow Properties

The blog Banner task flow displays a banner for the blog.

Properties that are unique to the blog Banner task flow are shown on the Parameters tab of the Component Properties dialog (Figure 38–8).

**Tip:** For information about accessing the Component Properties dialog, see Section 14.3, "Modifying Component Properties.”

**Figure 38–8  Blog Banner Task Flow Properties**

![Component Properties: Banner](image)
For information about the properties on the other tabs, which are common to all WebCenter Portal components, see Section 14.3, "Modifying Component Properties."

### 38.4.3.3.1 Blog Banner Task Flow Parameters

Table 38–3 describes the parameters that are unique to the blog Banner task flow.

#### Table 38–3  Blog Banner Task Flow Parameters

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Banner image URL</td>
<td>(Optional) The background image to be used in the blog banner. When not specified, the background image will default to an image provided by the current skin.</td>
</tr>
<tr>
<td>Resource Id</td>
<td>The resource ID of the blog folder (see Figure 38–2), which can be specified in the following formats</td>
</tr>
<tr>
<td></td>
<td>■  connection_name/path_to_folder</td>
</tr>
<tr>
<td></td>
<td>Where, connection_name is the name of the Oracle Content Server connection, and path_to_folder is the path to the folder on Oracle Content Server that you want to expose as a blog.</td>
</tr>
<tr>
<td></td>
<td>■  connection_name#dCollectionId</td>
</tr>
<tr>
<td></td>
<td>Where, connection_name is the name of the Oracle Content Server connection, and dCollectionId is the collection ID of the folder on Oracle Content Server that you want to expose as a blog.</td>
</tr>
<tr>
<td>Title</td>
<td>(Optional) The title to be used for the blog banner. Default: The blog folder name.</td>
</tr>
</tbody>
</table>

### 38.4.3.4 Setting Blog Main View Task Flow Properties

The Blog Main View task flow displays a blog or blog post with a default design.

Properties that are unique to the Blog Main View task flow are shown on the Parameters tab of the Component Properties dialog (Figure 38–9).

**Tip:** For information about accessing the Component Properties dialog, see Section 14.3, "Modifying Component Properties."
For information about the properties on the other tabs, which are common to all WebCenter Portal components, see Section 14.3, "Modifying Component Properties."

38.4.3.4.1 Blog Main View Task Flow Parameters  Table 38–4 describes the parameters that are unique to the Blog Main View task flow.

Table 38–4  Blog Main View Task Flow Parameters

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hide Comments</td>
<td>Specifies whether the Comments feature is exposed:</td>
</tr>
<tr>
<td></td>
<td>■ Select to hide the Comments link and pane.</td>
</tr>
<tr>
<td></td>
<td>■ Deselect (default) to show the Comments link and pane.</td>
</tr>
<tr>
<td>Number of blog posts</td>
<td>The number of blog posts displayed in the Blog Main View before the Next</td>
</tr>
<tr>
<td>displayed</td>
<td>and Previous icons are enabled.</td>
</tr>
<tr>
<td>Default: 10</td>
<td></td>
</tr>
</tbody>
</table>
38.4.3.5 Setting Blog Viewer Task Flow Properties

The Blog Viewer task flow displays a blog or blog post.

Properties that are unique to the Blog Viewer task flow are shown on the Parameters tab of the Component Properties dialog (Figure 38-10).

**Tip:** For information about accessing the Component Properties dialog, see Section 14.3, "Modifying Component Properties."
Figure 38–10  Blog Viewer Task Flow Properties

For information about the properties on the other tabs, which are common to all WebCenter Portal components, see Section 14.3, "Modifying Component Properties."

38.4.3.5.1 Blog Viewer Task Flow Parameters  Table 38–5 describes the parameters that are unique to the Blog Viewer task flow.

Table 38–5  Blog Viewer Task Flow Parameters  

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hide Comments</td>
<td>Specifies whether the Comments feature is exposed:</td>
</tr>
<tr>
<td></td>
<td>■ Select to hide the Comments link and pane.</td>
</tr>
<tr>
<td></td>
<td>■ Deselect (default) to show the Comments link and pane.</td>
</tr>
<tr>
<td>Filter Month</td>
<td>A number from 1 to 12 specifying the target month used to filter blog entries. For this parameter to take effect, the Filter Year parameter must also be specified. Example: 10 (October)</td>
</tr>
<tr>
<td>Number of blog posts displayed</td>
<td>The number of blog posts displayed in the Blog Digest Viewer before the Next and Previous icons are enabled. Default: 10</td>
</tr>
</tbody>
</table>
38.4.3.6 Setting Recent Posts Task Flow Properties

The Recent Posts task flow displays a list of most recent blog posts.

Properties that are unique to the Recent Posts task flow are shown on the Parameters tab of the Component Properties dialog (Figure 38–11).

**Tip:** For information about accessing the Component Properties dialog, see Section 14.3, "Modifying Component Properties."

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resource Id</td>
<td>The target blog resource to display. This can be either a folder ID (Figure 38–2), in which case the blog listing for this folder will display, or a document ID, in which case the blog post will display. A folder can be specified in the following formats:</td>
</tr>
<tr>
<td></td>
<td>▪ connection_name/path_to_folder</td>
</tr>
<tr>
<td></td>
<td>Where, connection_name is the name of the Oracle Content Server connection, and path_to_folder is the path to the folder on Oracle Content Server that you want to expose as a blog.</td>
</tr>
<tr>
<td></td>
<td>▪ connection_name#dCollectionId:dcollectionId</td>
</tr>
<tr>
<td></td>
<td>Where, connection_name is the name of the Oracle Content Server connection, and dcollectionId is the collection ID of the folder on Oracle Content Server that you want to expose as a blog.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> To allow users to add new blog posts (by clicking New Post in the task flow), the specified folder must have a security group assigned in Content Server.</td>
</tr>
<tr>
<td>Filter Year</td>
<td>A four-digit number specifying the target year used to filter blog entries.</td>
</tr>
<tr>
<td></td>
<td>Example: 2012</td>
</tr>
</tbody>
</table>
For information about the properties on the other tabs, which are common to all WebCenter Portal components, see Section 14.3, "Modifying Component Properties."

38.4.3.6.1 Recent Posts Task Flow Parameters

Table 38–6 describes the parameters that are unique to the Recent Posts task flow.

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
</table>
| Recent Posts List Size | The number of recent posts to display.  
Default: 10  
  
Resource Id | The resource ID of the blog folder (see Figure 38–2), which can be specified in the following formats  
connection_name/path_to_folder  
Where, connection_name is the name of the Oracle Content Server connection, and path_to_folder is the path to the folder on Oracle Content Server that you want to expose as a blog.  
connection_name#dCollectionID:dCollectionId  
Where, connection_name is the name of the Oracle Content Server connection, and dCollectionId is the collection ID of the folder on Oracle Content Server that you want to expose as a blog. |
Part VII

Working with 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.

- Chapter 39, "Introduction to Portal Tools and Services"
- Chapter 40, "Adding Activity Graphs and Recommendations to a Portal"
- Chapter 41, "Adding Activities to a Portal"
- Chapter 42, "Adding Analytics to a Portal"
- Chapter 43, "Adding Announcements to a Portal"
- Chapter 44, "Adding a Calendar and Events to a Portal"
- Chapter 45, "Adding Connections to a Portal"
- Chapter 46, "Adding Discussion Forums to a Portal"
- Chapter 47, "Adding Lists of Information to a Portal"
- Chapter 48, "Adding Mail to a Portal"
- Chapter 49, "Adding Messages and Feedback to a Portal"
- Chapter 50, "Adding Notifications to a Portal"
- Chapter 51, "Adding Personal Notes to a Portal"
- Chapter 52, "Adding Polls to a Portal"
- Chapter 53, "Adding Profiles to a Portal"
- Chapter 54, "Adding RSS Feeds to a Portal"
- Chapter 55, "Adding Search to a Portal"
- Chapter 56, "Adding Tagging to a Portal"
- Chapter 57, "Adding Worklists to a Portal"
Introduction to Portal Tools and Services

This chapter provides an overview of the tools and services available in WebCenter Portal, and how to enable or disable tools in a portal. These tasks are performed by a portal moderator. However, working with tools and services at the application level is a system administrator task, as described in the “Managing Tools and Services” chapter in *Administering Oracle WebCenter Portal*.

This chapter includes the following topics:

- Section 39.1, "About Tools and Services"
- Section 39.2, "Enabling and Disabling Tools and Services Available to a Portal"

Permissions: To perform the tasks in this chapter, you need the portal-level permission Manage Security and Configuration or Manage Configuration. A portal moderator has this permission by default.

For more information about permissions, see Section 29.1, "About Roles and Permissions for a Portal."

### 39.1 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.

*Table 39–1* shows which tools and services are provided out-of-the-box and those that require additional configuration:

<table>
<thead>
<tr>
<th>WebCenter Portal (All Portals)</th>
<th>Tools and Services</th>
</tr>
</thead>
<tbody>
<tr>
<td>Automatically available out-of-the-box</td>
<td>Portal events, links, lists, search, people connections, polls, tags</td>
</tr>
</tbody>
</table>

---

This chapter includes the following topics:

- Section 39.1, "About Tools and Services"
- Section 39.2, "Enabling and Disabling Tools and Services Available to a Portal"

Permissions: To perform the tasks in this chapter, you need the portal-level permission Manage Security and Configuration or Manage Configuration. A portal moderator has this permission by default.

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<tbody>
<tr>
<td>Automatically available out-of-the-box</td>
<td>Portal events, links, lists, search, people connections, polls, tags</td>
</tr>
</tbody>
</table>
If the necessary connections exist to make them available, Table 39–2 shows which tools and services are always available in a portal and those that need to be enabled by the portal moderator:

### Table 39–2  Enabling Tools and Services in a Portal

<table>
<thead>
<tr>
<th>Individual Portals</th>
<th>Tools and Services</th>
</tr>
</thead>
<tbody>
<tr>
<td>Always enabled (if available)</td>
<td>Activity graph, analytics, links, people connections, polls, tags</td>
</tr>
<tr>
<td>Portal moderator can enable/disable (if available)</td>
<td>Announcements, discussions, events, lists, documents</td>
</tr>
</tbody>
</table>

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:

- Activity Graph
- Analytics
- Documents (for documents, wikis, and blogs that want to include comments, and Activity Stream)
- Links
- Lists
- People Connections
- Polls
- 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:
If a tool is disabled in the portal template, portal moderators 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 moderators can manually disable tools that are not required from the portal’s administration settings.

See Section 39.2, "Enabling and Disabling Tools and Services Available to a Portal."

After enabling tools and services for a portal, the moderator also must make sure that the portal participants have the required permissions to work with some of these tools, such as announcements, discussions, lists, and so on. For more information about portal-level permissions, see Section 29.1, "About Roles and Permissions for a Portal."

The moderator must also make sure that portal participants can access tools and services in the following ways:

- By providing users with a pretty URL to access the tool page. For more information, see Section A.7, "Pretty URLs for Pages in a Specified Portal."
- By adding the associated tool or service task flows to a portal page. For more information, see Section 14.2, "Adding a Component to a Page."
- By adding a page link to the tool page in the portal navigation, as described in Section 13.2, "Adding an Existing Page to the Portal Navigation."

Table 39–3 lists the tools and services available in a portal.

<table>
<thead>
<tr>
<th>Tools and Services</th>
<th>Description</th>
<th>For More Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Activity Graph</td>
<td>Recommends people, portals, and content that a user may be interested in connecting with, based on existing connections and shared interaction with objects in the portal</td>
<td>Chapter 40, &quot;Adding Activity Graphs and Recommendations to a Portal&quot;</td>
</tr>
<tr>
<td>Activity Stream</td>
<td>Provides a streaming view of the activities of your connections, actions taken in portals, and business activities</td>
<td>Chapter 41, &quot;Adding Activities to a Portal&quot;</td>
</tr>
<tr>
<td>Analytics</td>
<td>Enables you to display usage and performance metrics for your portal application</td>
<td>Chapter 42, &quot;Adding Analytics to a Portal&quot;</td>
</tr>
<tr>
<td>Announcements</td>
<td>Provides the ability to post announcements about important activities and events to all authenticated users</td>
<td>Chapter 43, &quot;Adding Announcements to a Portal&quot;</td>
</tr>
<tr>
<td>Discussions</td>
<td>Provides the ability to create threaded discussions, posting and responding to questions and searching for answers</td>
<td>Chapter 46, &quot;Adding Discussion Forums to a Portal&quot;</td>
</tr>
<tr>
<td>Tools and Services</td>
<td>Description</td>
<td>For More Information</td>
</tr>
<tr>
<td>---------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>--------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Documents</td>
<td>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 Documents tool console or task flows such as Document Explorer, Document List Viewer, and Document Manager. Provides components that display an individual file on a page as a linked document, an inline preview, or an image. The documents tool also supports wiki and blog functionality.</td>
<td>Chapter 34, &quot;Working with Document Task Flows and Document Components&quot; Chapter 35, &quot;Setting Document Task Flow and Document Component Properties&quot; Chapter 36, &quot;Working with Workflow-Enabled Content&quot; Chapter 37, &quot;Adding a Wiki to a Portal.&quot; Chapter 38, &quot;Adding a Blog to a Portal.&quot;</td>
</tr>
<tr>
<td>Events</td>
<td>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.</td>
<td>Chapter 44, &quot;Adding a Calendar and Events to a Portal&quot;</td>
</tr>
<tr>
<td>Instant Messaging and Presence (IMP)</td>
<td>Provides the ability to observe the status of other authenticated users (online, offline, busy, or away) and to contact them instantly.</td>
<td>&quot;Using Instant Messaging and Presence Viewer&quot; in Using Oracle WebCenter Portal</td>
</tr>
<tr>
<td>Links</td>
<td>Provides the ability to view, access, and associate related information; for example, you can link to a document from a discussion.</td>
<td>&quot;Linking Information in WebCenter Portal&quot; in Using Oracle WebCenter Portal</td>
</tr>
<tr>
<td>Lists</td>
<td>Provides the ability to create, publish, and manage lists</td>
<td>Chapter 47, &quot;Adding Lists of Information to a Portal&quot;</td>
</tr>
<tr>
<td>Mail</td>
<td>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.</td>
<td>Chapter 48, &quot;Adding Mail to a Portal&quot;</td>
</tr>
<tr>
<td>Messages and Feedback</td>
<td>Provides the ability to post messages, attachments, and feedback for your connections and to the Activity Stream.</td>
<td>Chapter 49, &quot;Adding Messages and Feedback to a Portal&quot;</td>
</tr>
<tr>
<td>Notes</td>
<td>Provides the ability to &quot;jot down&quot; and retain bits of personally relevant information.</td>
<td>Chapter 51, &quot;Adding Personal Notes to a Portal&quot;</td>
</tr>
<tr>
<td>Notifications</td>
<td>Provides a means of subscribing to services and application objects and, when those objects change, receiving notification across one or more messaging channels.</td>
<td>Chapter 50, &quot;Adding Notifications to a Portal&quot;</td>
</tr>
<tr>
<td>People Connections</td>
<td>Provides the ability to manage personal profiles, access the profiles of other users, provide ad hoc feedback, post messages, track activities, and connect with others.</td>
<td>Chapter 45, &quot;Adding Connections to a Portal&quot;</td>
</tr>
<tr>
<td>Polls</td>
<td>Enables you to survey your audience (such as their opinions and their experience level), check whether they can recall important information, and gather feedback.</td>
<td>Chapter 52, &quot;Adding Polls to a Portal&quot;</td>
</tr>
</tbody>
</table>
Enabling and Disabling Tools and Services Available to a Portal

Table 39–3  (Cont.) Portal Tools and Services

<table>
<thead>
<tr>
<th>Tools and Services</th>
<th>Description</th>
<th>For More Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Profiles</td>
<td>Provides views of users’ contact information (such as email address, business address, phone number, department, manager, photo, portal activities, public documents, and connections)</td>
<td>Chapter 53, &quot;Adding Profiles to a Portal&quot;</td>
</tr>
<tr>
<td>Recent Activities</td>
<td>Provides a summary view of recent changes to documents, discussions, and announcements</td>
<td>Chapter 41, &quot;Adding Activities to a Portal&quot;</td>
</tr>
<tr>
<td>RSS</td>
<td>Provides the ability to access the content of many different web sites from a single location—a news reader</td>
<td>Chapter 54, &quot;Adding RSS Feeds to a Portal&quot;</td>
</tr>
<tr>
<td>Search</td>
<td>Provides search functionality (This includes integrating Oracle Secure Enterprise Search.)</td>
<td>Chapter 55, &quot;Adding Search to a Portal&quot;</td>
</tr>
<tr>
<td>Tags</td>
<td>Provides the ability to assign one or more personally-relevant keywords to a given page or document</td>
<td>Chapter 56, &quot;Adding Tagging to a Portal&quot;</td>
</tr>
<tr>
<td>Worklists</td>
<td>Provides a personal view of business processes that require attention</td>
<td>Chapter 57, &quot;Adding Worklists to a Portal&quot;</td>
</tr>
</tbody>
</table>

39.2 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 Section 39.1, "About Tools and Services."

To enable or disable a tool or service in your portal:

1. In the portal administration (see Section 7.1, "Accessing Portal Administration"), click Tools and Services in the left navigation pane (Figure 39–1).

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: Appendix A, "WebCenter Portal Pretty URLs."
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 the "Managing Tools and Services" chapter 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, **Figure 39–2** shows the Announcements tool as Enabled when the check box is selected.
4. Optionally, perform some additional configuration for some of the tools and services.

- **Announcements**—search for a new forum ID to store portal announcements (see Section 43.3, "Modifying Announcement Forum Settings for a Portal").
  
  For more information about working with announcements, see Chapter 43, "Adding Announcements to a Portal."

- **Discussions**—search for a new forum ID to store portal discussions or select to support multiple forums in the portal (see Section 46.3, "Modifying Discussion Forum Settings for a Portal") and publish portal mail as discussion topics (see Section 46.4, "Publishing Portal Mail in a Discussion Forum").
  
  For more information about working with discussions, see Chapter 46, "Adding Discussion Forums to a Portal."

- **Documents**—For more information about working with documents, see Part VI, "Working with Content in a Portal."

**Note:** The Documents tool is exposed on the **Tools and Services** page in a portal only with Content Server 11g. If the connected content repository is Content Server 10g, the Documents tool is not available in the portal administration settings. To use the Documents tool functionality in 10g, you can create a page in a portal and add Documents tool task flows to the page (see Section 34.4, "Adding a Document Task Flow to a Page").

- **Events**—create event categories, for grouping events, as described in Section 44.3, "Creating and Managing Portal Event Categories."
  
  For more information about working with calendars and events, see Chapter 44, "Adding a Calendar and Events to a Portal."

- **Lists**—For more information about working with lists, see Chapter 47, "Adding Lists of Information to a Portal."
■ Mail—although the default distribution list is created during portal creation, you can update the distribution list for the portal (see Section 48.2, "Configuring the Mail Distribution List for a Portal") and specify a shared distribution list for a portal (see Section 48.3, "Configuring the Send Mail Feature").

For more information about working with mail, see Chapter 48, "Adding Mail to a Portal."

■ Search—shows the search option that has been configured for WebCenter Portal. Your search environment varies depending on the option configured.

If your system is configured with Oracle SES 11.2.2.2, then you can make search customizations for a specific portal on this page. Oracle SES 11.2.2.2 supports faceted search and document thumbnails, while earlier releases of Oracle SES and implementations with live (delegated) search do not. You can revert to Oracle SES 11.1.2.* functionality on this page by deselecting the Use new search task flow with facet support check box.

If your system is configured with Oracle SES 11.1.2.*, then you can make search customizations using search task flow parameters only. Oracle SES 11.1.2.* supports saving searches and setting user preferences with search, while the 11.2.2.2 adapter and implementations with live (delegated) search do not.

For more information about working with search, see Chapter 55, "Adding Search to 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 moderator.

---

6. Grant appropriate permissions for each member role on the Roles page to allow portal members to access the enabled services.

See Section 29.3, "Viewing and Editing Permissions of a Portal Role."

7. Make sure that portal participants have access to the tools and services in any of the following ways:

■ Provide users with a pretty URL to access the tool page. For more information, see Section A.7, "Pretty URLs for Pages in a Specified Portal."

■ Add the associated tool or service task flows to a portal page. For more information, see Section 14.2, "Adding a Component to a Page."

■ Add a page link to the tool page in the portal navigation, as described in Section 13.2, "Adding an Existing Page to the Portal Navigation."
This chapter describes how to enable recommendations for people, portals, and content that may be of interest to WebCenter Portal users.

This chapter includes the following topics:

- Section 40.1, "About the Activity Graph Recommendations"
- Section 40.2, "Adding an Activity Graph Task Flow to a Page"
- Section 40.3, "Setting Activity Graph Task Flow Properties"

**Permissions:** To perform the tasks in this chapter, you need the portal-level permission Basic Services: Edit Page Access, Structure, and Content (standard permissions) or Pages: Edit Pages (advanced permissions). A portal moderator has this permission by default.

For more information about permissions, see Section 29.1, "About Roles and Permissions for a Portal."

### 40.1 About the Activity Graph Recommendations

The activity graph provides suggestions of people that a user may be interested in connecting with, based on existing connections and shared interaction with objects within the application. It also directs users to portals or content that may be of interest, based on ranking calculations.

The activity graph lets you leverage collective intelligence, gathered by the underlying activity graph engine, to benefit search and social applications. It provides suggestions of people that a user may be interested in connecting with, based on existing connections and shared interaction with objects in the application. It also directs users to portals or items that may be of interest, based on similar interactions with those portals or items the user is currently viewing.

The activity graph presents these suggestions based on data gathered and analyzed by the activity graph engine. The activity graph engine provides a central repository for actions that are collected by enterprise applications.
Notes: The activity graph task flows display recommendations only if the activity graph is configured in your application. For more information, see the "Activity Graph Prerequisites" section in Administering Oracle WebCenter Portal.

The recommendations provided in the task flows reflect the contents of the activity graph when the activity graph engines were last run. Activities that occurred after the last run are not included. For more information, see the "Preparing Data for the Activity Graph" section in the Administering Oracle WebCenter Portal.

Out of the box, the activity graph tracks certain WebCenter Portal objects and actions. However, you can extend it to track other WebCenter Portal objects or actions, or objects and actions from other applications.

See Also: The "Extending the Activity Graph" section in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper

This section includes the following topics:

- Section 40.1.1, "Working with the Recommended Connections Task Flow"
- Section 40.1.2, "Working with the Similar Portals Task Flow"
- Section 40.1.3, "Working with the Similar Items Task Flow"
- Section 40.1.4, "Working with the Top Items Task Flow"
- Section 40.1.5, "Working with Top Contributions"

See Also: The "Exploring Recommendations and Content" chapter in Using Oracle WebCenter Portal

40.1.1 Working with the Recommended Connections Task Flow

The Recommended Connections task flow (Figure 40–1) lets users view and connect with people similar to them. This task flow is available by default on each user's Profile page.

Figure 40–1  The Recommended Connections Task Flow
40.1.2 Working with the Similar Portals Task Flow

The Similar Portals task flow lets users identify and interact with portals that may be of interest to them.

The Similar Portals task flow can be placed on any page in a portal. It provides suggestions of other portals that are similar to the one currently displaying. A portal is considered similar to another portal if the same people interact with it, especially if they edit the content.

Only portals that users are permitted to view are listed in the Similar Portals task flow.

---

**Note:** The suggestions made in the Similar Portals task flow are determined based on the currently viewed portal only; they are not specific to the current user.

---

40.1.3 Working with the Similar Items Task Flow

The Similar Items task flow ([Figure 40–2](#)) provides suggestions of other items, based on the item currently selected on the page.

**Figure 40–2 The Similar Items Task Flow**

![Similar Items Task Flow](image)

When you initially display a page that contains the Similar Items task flow, the task flow probably will be empty. To populate the task flow, you must select an item for which you want to see similar items.

---

**Note:** The suggestions made in the Similar Items task flow are determined based on the currently selected item only; they are not specific to the current user.

---

When you initially display a page that contains the Similar Items task flow, the task flow probably will be empty. To populate the task flow, you must select an item for which you want to see similar items.

---

**Note:** If the page containing the Similar Items task flow also contains the Document Viewer, then the document currently displayed in the Document Viewer drives the content of the Similar Items task flow and you do not need to explicitly select an item.

---

To populate the Similar Items task flow on a page:
1. Open the page in edit mode (see Section 12.4.3, "Opening a Page in the Page Editor (Composer)").

   **Note:** By default, the view switcher is set to **Web** and Composer displays the page in Design view showing the inline resource catalog.

2. In one of the other task flows on the page, select the item for which you want to see similar items.

   The Similar Items task flow works in conjunction with the following Documents task flows:
   - Recent Documents
   - Document List Viewer
   - Document Navigator
   - Document Explorer
   - Folder Viewer
   - Document Manager
   - Document Browser

   To see recommendations for a discussion topic, edit the Similar Items task flow Resource Id parameter and enter the resource ID of the discussion topic.

3. The Similar Items task flow refreshes to display items that are similar to the one you selected.

### 40.1.4 Working with the Top Items Task Flow

The Top Items task flow (Figure 40–3) enables viewing and interacting with WebCenter Portal items (documents, wikis, and blogs) the activity graph has calculated to be active in the current portal. The rank calculation is specified in the *recipe* parameter.

**Figure 40–3  Top Items Task Flow**

The items are not specific to the current user, however the task flow lists only those items that the current user has permission to see.

For information about how to use this task flow at runtime, see the “Working with Top Items” section in *Using Oracle WebCenter Portal*. 
40.1.5 Working with Top Contributions

Top Contributions is another mode of the Top Items task flow, which gets activated when the task flow is placed outside of a portal; for example, when it is placed in the Home portal or in a Portal Framework application.

Top Contributions mode enables viewing and interacting with the WebCenter Portal items (documents, wikis, and blogs) the activity graph has calculated to be the top contributions by the current user (Figure 40–4). The rank calculation is specified in the recipe parameter.

![Top Contributions](image)

Top Contributions is available by default on each user’s Profile page (Figure 40–5).

![Top Contributions on the Profile Page](image)

For information about how to use this task flow at runtime, see the "Working with Top Contributions" section in Using Oracle WebCenter Portal.

40.2 Adding an Activity Graph Task Flow to a Page

By default, the Recommended Connections and Top Items (Top Contributions) task flows are included in each user’s Profile Gallery, available through the Home portal. The Similar Items task flow is included, by default, in the Document Viewer Related Items pane for files, to show items similar to the currently viewed file.
To include any of the activity graph task flows anywhere else, you must add the task flow to the appropriate page. For the steps to add an activity graph task flow to a page, see Section 14.2, "Adding a Component to a Page."

**Tip:** The presence or location of the activity graph task flows depends on how the resource catalog is configured. For example, in the Default Portal Catalog, open the Social and Communication folder to expose the activity graph task flows.

### 40.3 Setting Activity Graph Task Flow Properties

The activity graph task flows have associated properties, which users with sufficient privileges can access through the Component Properties dialog in Composer (Figure 40–6).

**Figure 40–6  Recommended Connections Task Flow - Component Properties**

For information about accessing the Component Properties dialog, see Section 14.3, "Modifying Component Properties."

The following topics provide information about properties of the activity graph task flows and describe the properties on the Parameters tab:

- Section 40.3.1, "About the Activity Graph Task Flow Properties"
- Section 40.3.2, "Activity Graph Task Flow Parameters"
40.3.1 About the Activity Graph Task Flow Properties

The properties on the Parameters tab of the Component Properties dialog control the default task flow content. For descriptions of the parameters on this tab, see Section 40.3.2, "Activity Graph Task Flow Parameters." For some task flows, parameters on this tab facilitate the wiring of the task flow to page parameters and page definition variables. For more information, see Chapter 19, "Wiring Pages, Task Flows, Portlets, and ADF Components."

Changes to the properties on the Display Options, Style, and Content Style tabs affect the appearance and behavior of the task flow for all users. These properties are common to all task flows. For more information, see Section 14.3, "Modifying Component Properties."

The contents of the Events tab depend on the events supported by the task flow. For more information, see Section 14.3.7, "Working with Component Contextual Events."

All properties on the Parameters and Display Options tabs provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the Edit icon next to a property field to open the editor.

---

**Note:** When you enter EL on the generic Display Options tab in the Component Properties 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 14–1, "Display Options Properties".

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

If you need EL assistance, an application developer can provide an EL expression; see the "Expression Language Expressions" appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

40.3.2 Activity Graph Task Flow Parameters

Table 40–1 describes the parameters available in the activity graph task flows.
<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
<th>Task Flow</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resource Id</td>
<td>The ID of the person, portal, or item to use as a context for recommendations. For connections, the default value is the expression language token for the logged in user. For portals, the default value is the expression language token for the resource ID of the portal containing the task flow. For items, the value is derived from the selection event using the EL expression #{wcEventContext.events.WebCenterResourceSelected}.</td>
<td>Recommended Connections</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Similar Portals</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Similar Items</td>
</tr>
<tr>
<td>Class URN</td>
<td>The class of the context. By default the information is derived from the selection event.</td>
<td>Similar Items</td>
</tr>
<tr>
<td>Rank URNs</td>
<td>The name of the portal or item to use as a context for recommendations. For portals, the default value is the expression language token for the resource ID of the portal containing the task flow. For items, the default value is derived from the selection event.</td>
<td>Top Items</td>
</tr>
<tr>
<td>Object Name</td>
<td></td>
<td>Similar Portals</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Similar Items</td>
</tr>
<tr>
<td>Recipe</td>
<td>A comma-separated list of registered similarity calculation = weight pairs (or for Top Items, rank calculation = weight pairs). The list determines what recommendations appear and how they are ordered. For more information about the default recipes for activity graph task flows, see the &quot;Activity Graph Task Flows&quot; section in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.</td>
<td>Recommended Connections</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Similar Portals</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Similar Items</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Top Items</td>
</tr>
</tbody>
</table>
**Table 40–1 (Cont.) Activity Graph Task Flow Parameters**

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
<th>Task Flow</th>
</tr>
</thead>
<tbody>
<tr>
<td>Class URN Restrictions</td>
<td>A comma-separated list of the node classes to include in the recommendations. If non-null, then only objects from the given node classes are included in the recommendations.</td>
<td>Similar Items</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Top Items</td>
</tr>
<tr>
<td>Exclude Object Actions</td>
<td>A comma-separated list of registered actions. The task flow will not show people, portals, or items on which the logged in user took any of the listed actions.</td>
<td>Recommended Connections</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Similar Items</td>
</tr>
<tr>
<td>Service Id</td>
<td>Used in conjunction with Resource Id, and optionally Resource Type, as an alternative to classURN for identifying the node class of an object.</td>
<td>Similar Items</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Top Items</td>
</tr>
<tr>
<td>Resource Type</td>
<td>Used in conjunction with Resource Id and Service Id, as an alternative to classURN for identifying the node class of a WebCenter Portal object. For example resourceType is used by the Documents to identify whether an object is a wiki, blog, or document.</td>
<td>Similar Items</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Top Items</td>
</tr>
<tr>
<td>Suppress Popup</td>
<td>Determines whether links in the task flow launch content in inline popups (false) or in browser windows (true). The default value is false.</td>
<td>Similar Items</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Top Items</td>
</tr>
<tr>
<td>Suppress Toolbar</td>
<td>Whether the toolbar should be hidden. Specify #{true} to hide the toolbar.</td>
<td>Top Contributions</td>
</tr>
<tr>
<td>Number of Columns</td>
<td>Number of columns to be used in layout. This is applicable for iconic view only.</td>
<td>Recommended Connections</td>
</tr>
<tr>
<td>Number of Recommended Connections</td>
<td>Number of recommendations shown. If the rows and columns both are specified, then this value is ignored. This is applicable for iconic view only.</td>
<td>Recommended Connections</td>
</tr>
</tbody>
</table>
### Table 40-1 (Cont.) Activity Graph Task Flow Parameters

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
<th>Task Flow</th>
</tr>
</thead>
<tbody>
<tr>
<td>Users I am Connected with</td>
<td>Select to include the users the current user is already connected with in the list of recommended connections. Clear to exclude users with whom the current user is already connected.</td>
<td>Recommended Connections</td>
</tr>
<tr>
<td>Hide Name</td>
<td>Whether the display of the name should be turned off for iconic view. Specifying {true} prevents a name link from appearing in the recommendations iconic view and the image turns to a link.</td>
<td>Recommended Connections</td>
</tr>
<tr>
<td>Hide Toolbar</td>
<td>Whether the display of the toolbar should be turned off for iconic view. Specifying {true} prevents the toolbar from appearing in the recommendations iconic view.</td>
<td>Recommended Connections</td>
</tr>
<tr>
<td>Profile Format</td>
<td>The layout style for the task flow. Enter one of the following:</td>
<td>Recommended Connections</td>
</tr>
<tr>
<td></td>
<td>iconic - Display recommendations profile photo and user name</td>
<td></td>
</tr>
<tr>
<td></td>
<td>list - Display list of recommendations</td>
<td></td>
</tr>
<tr>
<td>Number of Rows</td>
<td>Number of rows to be used in layout. This is applicable for iconic view only.</td>
<td>Recommended Connections</td>
</tr>
</tbody>
</table>
This chapter describes how to add the Activity Stream and Recent Activities task flows to a portal. Both task flows provide a streaming view of the actions performed by a users' connections, actions taken in portals, and business activities. Activity Stream can note when a user posts feedback, uploads a document, or creates a discussion forum. Additionally, it streams messages and attachments entered through the Publisher task flow. Recent Activities tracks the changes made to application pages, documents, discussion forums, lists, and the like.

This chapter includes the following topics:

- Section 41.1, "Comparison of Activity Stream and Recent Activities"
- Section 41.2, "About the Activity Stream"
- Section 41.3, "Adding an Activity Stream Task Flow to a Page"
- Section 41.4, "Setting Activity Stream Task Flow Properties"
- Section 41.5, "Working with Activity Stream Task Flows"
- Section 41.6, "About Recent Activities"
- Section 41.7, "Adding a Recent Activities Task Flow to a Page"
- Section 41.8, "Setting Recent Activities Task Flow Properties"
- Section 41.9, "Working with the Recent Activities Task Flow"
- Section 41.10, "About Publisher"
- Section 41.11, "Adding a Publisher Task Flow to a Page"
- Section 41.12, "Setting the Publisher Task Flow Properties"
- Section 41.13, "Working with the Publisher Task Flow"

**Permissions:** To perform the tasks in this chapter, you need the portal-level permission Basic Services: Edit Page Access, Structure, and Content (standard permissions) or Pages: Edit Pages (advanced permissions). A portal moderator has this permission by default.

For more information about permissions, see Section 29.1, "About Roles and Permissions for a Portal."
41.1 Comparison of Activity Stream and Recent Activities

Activity Stream and Recent Activities both track and report on activities in WebCenter Portal, enabling users to easily keep up with what is going on. However, there are two main differences between them. First, Activity Stream tracks a broader range of activities. For example, Recent Activities tracks the Documents (including wikis and blogs), Announcements, Discussions, and Page activities. Activity Stream tracks these activities as well as People Connections. Second, Recent Activities reports activities regardless of who performs the action. Activity Stream reports activities performed by a user's connections. There is a third, small difference—Activity Stream includes information about who performed the activity, whereas Recent Activities does not.

41.2 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, uploads a document, or creates a discussion forum. Additionally, it streams messages and attachments entered through Publisher.

See Also: Section 41.10, "About Publisher"

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, the Activity Stream can provide access to file attachments and web links added through the Publisher task flow. Supported mime types can be fully previewed in the Activity Stream. Unsupported mime types are rendered as links, which you can use to access the file.

Activity Stream previews files through either a native web format or through Oracle WebCenter Content slide rendition. The previewer used depends on the mime type of the file to be previewed.

The mime types that use the native web format include the following:

- image
- htm
- text

The mime types that use Oracle WebCenter Content slide rendition include the following:

- pdf
- powerpoint
- powerpnt
- pptx

Note: PDF file previews are available in Activity Stream when the mime type is pdf, webContextRoot is specified in the Oracle WebCenter Content connection, and the application is accessed through an Oracle HTTP Server.
The mime types shown in the previous lists are the only mime types that are previewed. Other mime types appear as links. The mime types docx and xlsx are not previewed in Activity Stream. A parameter associated with an Activity Stream task flow instance can be set to omit file previews (for more information, see Section 41.4.2, "Activity Stream Task Flow Parameters").

Users can share a streamed activity and its attachments using a Share feature, available on each streamed item.

**See Also:** For information about using the Publisher task flow, see the "Liking, Commenting On, and Sharing Items in WebCenter Portal" chapter in *Using 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**

<table>
<thead>
<tr>
<th>Tool/Service</th>
<th>Tracked Activities</th>
<th>Scope</th>
<th>Activities Shared or Private</th>
</tr>
</thead>
</table>
| Announcements | ■ Create announcement  
                  ■ Edit announcement | ■ portal | Shared with other portal members |
| Blogs | ■ Create blog  
            ■ Update blog | ■ portal  
            ■ Home portal | Activities on portal blogs are shared with other portal members  
Activities on Home portal blogs are shared with the blogger's connections |
| Connections | ■ Invite to connect  
             ■ Connection invite accepted | ■ Home portal | Shared with inviter and invitee's connections |
| Discussions | ■ Create forum  
             ■ Create topic  
             ■ Reply to topic | ■ portal | Shared with other portal members |
| Documents | ■ Create document  
            ■ Edit document  
            ■ Add tag  
            ■ Remove tag | ■ 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 |
About the Activity Stream

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 the “Setting Activity Stream Preferences” section in Using 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 Section 41.4, “Setting Activity Stream Task Flow Properties.”

WebCenter Portal provides the following Activity Stream task flows:

- **Activity Stream** for viewing application activities and the activities of your connections and for providing access to the attachments added through the Share feature.

---

**Table 41–1 (Cont.) Activities Tracked by Activity Stream**

<table>
<thead>
<tr>
<th>Tool/Service</th>
<th>Tracked Activities</th>
<th>Scope</th>
<th>Activities Shared or Private</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pages</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Create page</td>
<td>portal</td>
<td></td>
<td>Activities on portal pages are shared with other portal members</td>
</tr>
<tr>
<td>Edit page</td>
<td>Home portal</td>
<td></td>
<td>Activities on Home portal pages are private to user</td>
</tr>
<tr>
<td>Add tag</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Remove tag</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Profiles</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Update photo</td>
<td>Home portal</td>
<td></td>
<td>Shared with whomever is permitted to view such activities</td>
</tr>
<tr>
<td>Update profile</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Update personal status</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Portal Events</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Create event</td>
<td>portal</td>
<td></td>
<td>Shared with other portal members</td>
</tr>
<tr>
<td>Edit event</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Portals Management</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Create portal</td>
<td>portal</td>
<td></td>
<td>Shared with other portal members</td>
</tr>
<tr>
<td>Change portal membership</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Join portal</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Post comment</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Like item</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Update portal configuration</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enable portal tool or service</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Disable portal tool or service</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Change custom portal attribute</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Change portal role permissions</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Change portal role assignment</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tagging</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Add tag</td>
<td>portal</td>
<td></td>
<td>Activities in a portal are shared with all portal members.</td>
</tr>
<tr>
<td>Remove tag</td>
<td>Home portal</td>
<td></td>
<td>Activities in a Home portal are shared with whomever is permitted to view such activities</td>
</tr>
</tbody>
</table>
About the Activity Stream

Adding Activities to a Portal

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.

■ Activity Stream - Quick View provides a summary view of application activities and the activities of your connections (Figure 41–2).

Figure 41–2  Activity Stream - Quick View Task Flow

Unlike the full view of Activity Stream, Activity Stream - Quick View does not display Like, comments, and Share links. 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, users see one entry that says the user "posted messages," but only the most recent message is shown.

A hierarchy of configuration settings control what users can do with their view of the Activity Stream. The system administrator sets application-wide values on the Administration page. Users can set their own personal values through People Connections Preferences. You can also set values on a given task flow instance in both the page editor, which affects all users’ views of the task flow instance (application customization), and users can set values in page view mode, which affects only their view of the task flow (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 provides access to its own configuration settings through a pencil icon (Change the source, filter, and display options) (Figure 41–4).
Users use these controls to adjust an individual task flow instance with the same kinds of settings that are provided for all of their views of Activity Stream task flows through Activity Stream Preferences.

Clicking an object in an Activity Stream opens the object. For example, clicking the name of a newly created document in an Activity Stream opens the document. Clicking a user name in an Activity Stream opens a user profile pop-up. Clicking an attachment, such as a file or a URL, navigates you to that attachment.

See Also: You can attach object to messages streamed from the Publisher task flow to the Activity Stream. For more information, see the "Liking, Commenting On, and Sharing Items in WebCenter Portal" chapter in Using Oracle WebCenter Portal.

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 the "Activity Stream" section in the WebLogic Scripting Tool Command Reference.
41.3 Adding an Activity Stream Task Flow to a Page

For the steps to add an Activity Stream task flow to a page, see Section 14.2, "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 Portal Catalog, the Activity Stream task flow is included under the **Alerts and Updates** folder.

41.4 Setting Activity Stream Task Flow Properties

Activity Stream task flows have associated properties, which users with sufficient privileges can access through the Component Properties dialog in Composer (Figure 41–5).

**Figure 41–5 Activity Stream Task Flow Component Properties**

The following sections provide information about properties associated with Activity Stream task flows and describe the properties available on the **Parameters** tab:

- Section 41.4.1, "About Activity Stream Task Flow Properties"
- Section 41.4.2, "Activity Stream Task Flow Parameters"
- Section 41.4.3, "Using an Advanced Query to Filter Activity Stream Items"
- Section 41.4.4, "Using Properties to Configure an Activity Stream Task Flow Instance"

**See Also:** Section 14.3.2, "Setting Properties on a Component"
41.4.1 About Activity Stream Task Flow Properties

When you set property values on an Activity Stream task flow, you are affecting only the task flow instance on which the value is set. Other instances of the same task flow are not affected by such changes.

The properties on the Parameters tab of the Component Properties dialog can affect the default task flow content. For descriptions of the parameters on this tab, see Section 41.4.2, "Activity Stream Task Flow Parameters." For some task flows, parameters on this tab facilitate the wiring of the task flow to page parameters and page definition variables. For more information, see Chapter 19, "Wiring Pages, Task Flows, Portlets, and ADF Components."

Changes to the properties on the Display Options, Style, and Content Style tabs affect the appearance and behavior of the task flow. These properties are common to all task flows. For more information, see Section 14.3.4, "Working with Component Display Options" and Section 14.3.6, "Working with Style and Content Style Properties."

The content of the Events tab depends on the events supported by the task flow. For more information, see Section 14.3.7, "Working with Component Contextual Events."

All properties on the Parameters and Display Options tabs provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the icon next to a property, then select Expression Builder to open the editor.

---

**Note:** When you enter EL on the generic Display Options tab in the Component Properties 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 14–1, "Display Options Properties".

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

If you need EL assistance, an application developer can provide an EL expression; see the "Expression Language Expressions" appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

41.4.2 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

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Advanced Query</td>
<td>A field for specifying a custom query to filter streamed items. For more information, see Section 41.4.3, “Using an Advanced Query to Filter Activity Stream Items.” This parameter is associated with the Activity Stream task flow.</td>
</tr>
<tr>
<td>Enable Context Info</td>
<td>A check box for specifying whether contextual information is shown when users click a Context Info icon. For example, if the item John created the purchase order General Supplies appears in the Activity Stream with a Context Info icon (the reddish dot), users who see the streamed item can click the icon to view the PO in a popup or navigate to the PO, depending on how the event is configured. This parameter is primarily for use with WebCenter Portal Framework applications where, unless otherwise handled (such as the Profile popup on a user name), resources are rendered within the Resource Viewer system page.</td>
</tr>
<tr>
<td>Hide Comments</td>
<td>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.</td>
</tr>
<tr>
<td>Hide Configuration Button</td>
<td>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:</td>
</tr>
</tbody>
</table>

Activity Stream - Quick View

Activity Stream
Table 41–2  (Cont.) Activity Stream Task Flow Parameters  

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hide Header</td>
<td>A check box for specifying whether to hide the controls that appear in the task flow header</td>
</tr>
<tr>
<td></td>
<td>■ Select the check box to hide the task flow header (#{true}). The Refresh and pencil icons are hidden.</td>
</tr>
<tr>
<td></td>
<td>■ Deselect the check box to show the task flow header (#{false}).</td>
</tr>
<tr>
<td></td>
<td>This parameter is associated with the Activity Stream - Quick View task flow.</td>
</tr>
<tr>
<td>Hide Inline Preview</td>
<td>A check box for specifying whether to hide previews of streamed files</td>
</tr>
<tr>
<td></td>
<td>■ Select the check box to hide previews of streamed files (#{true}). Links to streamed files are provided but previews are omitted.</td>
</tr>
<tr>
<td></td>
<td>■ Deselect the check box to show previews of streamed files (#{false}). Both links to and previews of streamed files are shown.</td>
</tr>
<tr>
<td></td>
<td>For information about the mime types that are supported for file previewing in Activity Stream, see Section 41.2, &quot;About the Activity Stream.&quot;</td>
</tr>
<tr>
<td></td>
<td>This parameter is associated with the Activity Stream task flow.</td>
</tr>
<tr>
<td>Hide Like</td>
<td>A check box for specifying whether to hide the Like link on streamed items</td>
</tr>
<tr>
<td></td>
<td>■ Select the check box to hide the Like link (#{true}).</td>
</tr>
<tr>
<td></td>
<td>■ Deselect the check box to show the Like link (#{false}).</td>
</tr>
<tr>
<td></td>
<td>This parameter is associated with the Activity Stream task flow.</td>
</tr>
<tr>
<td>Hide Share</td>
<td>A check box for specifying whether to hide the Share menu on streamed items</td>
</tr>
<tr>
<td></td>
<td>■ Select the check box to hide the Share menu (#{true}).</td>
</tr>
<tr>
<td></td>
<td>■ Deselect the check box to show the Share menu (#{false}).</td>
</tr>
<tr>
<td></td>
<td>This parameter is associated with the Activity Stream task flow.</td>
</tr>
<tr>
<td>Hide Spaces Options</td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td>■ Select the check box to show the Portals options. This is the default (#{true}).</td>
</tr>
<tr>
<td></td>
<td>■ Deselect the check box to hide the Portals options (#{false}).</td>
</tr>
<tr>
<td></td>
<td>This parameter is associated with the following task flows:</td>
</tr>
<tr>
<td></td>
<td>■ Activity Stream</td>
</tr>
<tr>
<td></td>
<td>■ Activity Stream - Quick View</td>
</tr>
<tr>
<td>No of activities to display per page</td>
<td>A field for entering the number of streamed items to show per page</td>
</tr>
<tr>
<td></td>
<td>This parameter is associated with the following task flows:</td>
</tr>
<tr>
<td></td>
<td>■ Activity Stream</td>
</tr>
<tr>
<td></td>
<td>■ Activity Stream - Quick View</td>
</tr>
<tr>
<td>Pagination</td>
<td>A check box for specifying whether to provide Previous and Next links to enable users to page through streamed activities</td>
</tr>
<tr>
<td></td>
<td>■ Select the check box to show Previous and Next links (#{true}).</td>
</tr>
<tr>
<td></td>
<td>■ Deselect the check box to hide them (#{false}).</td>
</tr>
<tr>
<td></td>
<td>This parameter is associated with the Activity Stream task flow.</td>
</tr>
</tbody>
</table>
41.4.3 Using an Advanced Query to Filter Activity Stream Items

The Activity Stream task flow provides an Advanced Query parameter, which you can use to create custom filters against streamed activities using a SQL WHERE clause. For example, using SQL you can set up an Activity Stream instance to show only those activities relating to the page or streaming from the current user or a named user.

This section provides an overview of the Activity Stream Advanced Query option and steps you through the process of entering an advanced query. It includes the following subsections:

- Section 41.4.3.1, "About the Activity Stream Advanced Query Option"
- Section 41.4.3.2, "Entering an Advanced Query Against an Activity Stream Task Flow Instance"
41.4.3.1 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 the "Expression Language Expressions" appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.
Table 41–3  Supported Database Objects for Constructing a SQL WHERE Clause

<table>
<thead>
<tr>
<th>Database Object</th>
<th>Alias Prefix</th>
<th>Supported Fields/Columns</th>
</tr>
</thead>
</table>
| 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 Portals with Oracle WebCenter Portal and Oracle JDeveloper.  
                  ■ 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 Portals with Oracle WebCenter Portal and Oracle JDeveloper.  
                      ■ OBJECT_ID—The GUID of the object.  
                      ■ DISPLAY_NAME—The object display name.  
                      ■ OBJECT_TYPE—The object type.  
                      Object type names for use with Advanced Query include:  
                      ■ event  
                      ■ announcement  
                      ■ forum  
                      ■ topic  
                      ■ bookmark  
                      ■ list  
                      ■ page  
                      ■ blog  
                      ■ document  
                      ■ wiki |

Table 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

<table>
<thead>
<tr>
<th>Tool/Service</th>
<th>Activity Type Name and Description</th>
</tr>
</thead>
</table>
| Events       | ■ createEvent - an event was created  
                  ■ updateEvent - an event was updated |
| Announcements| ■ createAnnouncement - an announcement was created  
                  ■ updateAnnouncement - an announcement was updated |
### Table 41–4  (Cont.) Activity Type Names for Advanced Query

<table>
<thead>
<tr>
<th>Tool/Service</th>
<th>Activity Type Name and Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Discussions</td>
<td></td>
</tr>
<tr>
<td>Tags</td>
<td></td>
</tr>
<tr>
<td>Lists</td>
<td></td>
</tr>
<tr>
<td>Page</td>
<td></td>
</tr>
<tr>
<td>Documents</td>
<td></td>
</tr>
<tr>
<td>People Connections (Profile)</td>
<td></td>
</tr>
<tr>
<td>People Connections (Message Board)</td>
<td></td>
</tr>
<tr>
<td>People Connections (Connections)</td>
<td></td>
</tr>
</tbody>
</table>

<details>

**Table 41–4  (Cont.) Activity Type Names for Advanced Query**

<table>
<thead>
<tr>
<th>Tool/Service</th>
<th>Activity Type Name and Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Discussions</td>
<td></td>
</tr>
<tr>
<td>Tags</td>
<td></td>
</tr>
<tr>
<td>Lists</td>
<td></td>
</tr>
<tr>
<td>Page</td>
<td></td>
</tr>
<tr>
<td>Documents</td>
<td></td>
</tr>
<tr>
<td>People Connections (Profile)</td>
<td></td>
</tr>
<tr>
<td>People Connections (Message Board)</td>
<td></td>
</tr>
<tr>
<td>People Connections (Connections)</td>
<td></td>
</tr>
</tbody>
</table>

</details>
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 the "Expression Language Expressions" appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

Query literals must be escaped by putting a backward slash (\) before each literal, otherwise such characters generate syntax errors (see Table 41–5 for examples).

Table 41–5 lists examples of advanced queries.

<table>
<thead>
<tr>
<th>Use Case</th>
<th>Query Syntax</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stream document creation activities.</td>
<td><code>AE.SERVICE_ID = 'oracle.webcenter.doclib'</code></td>
</tr>
<tr>
<td>Stream activities for an object or the current portal.</td>
<td><code>OD.OBJECT_ID = 'objectA' OR AE.SCOPE_ID = '#{serviceCtx.scope.GUID}'</code></td>
</tr>
<tr>
<td>Stream activities for wikis created by the current user.</td>
<td><code>OD.OBJECT_TYPE = 'Wiki' AND AD.ACTOR_NAME = '#{securityContext.userName}'</code></td>
</tr>
<tr>
<td>Stream activities for documents and discussions, but only create activities or any activity performed by the current user.</td>
<td><code>(AE.SERVICE_ID IN ('oracle.webcenter.doclib', 'oracle.webcenter.collab.forum') AND AE.ACTIVITY_TYPE IN ('createDocument', 'createTopic')) OR AD.ACTOR_NAME = '#{securityContext.userName}'</code></td>
</tr>
</tbody>
</table>

### 41.4.3.2 Entering an Advanced Query Against an Activity Stream Task Flow Instance

To enter an advanced query against an instance of the Activity Stream task flow:

1. Open the Component Properties dialog for the Activity Stream task flow instance you want to configure.

   **See Also:** Section 14.3.2, "Setting Properties on a Component"

2. In the Component Properties dialog, on the Parameters tab, provide a value for the property Advanced Query.

   **See Also:** For information about the type and format of values to provide for this field, see Section 41.4.3.1, "About the Activity Stream Advanced Query Option."
3. When you finish revising component properties, click OK.

4. Save your changes, and exit the page editor.

Going forward, streamed activities are filtered by your query.

41.4.4 Using Properties to Configure an Activity Stream Task Flow Instance

This section provides examples of how you use property values to affect the behavior of a given task flow instance. It includes the following subsections:

- Section 41.4.4.1, "Preventing Users from Customizing an Activity Stream"
- Section 41.4.4.2, "Hiding File Previews in Streamed Items"
- Section 41.4.4.3, "Preventing Users from Commenting on Streamed Items"
- Section 41.4.4.4, "Preventing Users from Liking Streamed Items"
- Section 41.4.4.5, "Preventing Users from Sharing Streamed Items"
- Section 41.4.4.6, "Hiding Home Portals Options in Activity Stream Task Flows"
- Section 41.4.4.7, "Limiting the Stream to Activities from One or More Portals"
- Section 41.4.4.8, "Limiting the Stream to One or More Services"
- Section 41.4.4.9, "Limiting the Stream to Your Own Activities"

41.4.4.1 Preventing Users from Customizing an Activity Stream

By default, Activity Stream task flows provide user customization controls that enable users to specify whose actions they want to see and from what services and portals in a given Activity Stream task flow. On the Activity Stream task flow, this is the Options link. On the Activity Stream - Quick View task flow, this is the pencil icon.

The Hide Configuration Button property is available when you want to prevent users from overriding application-level customizations with their own user-level customizations.

To prevent users from customizing an Activity Stream task flow instance:

1. Open the Component Properties dialog for the Activity Stream task flow instance you want to configure.

   See Also: Section 14.3.2, "Setting Properties on a Component"

2. In the Component Properties dialog, on the Parameters tab, select Hide Configuration Button.

   Note: To show the Options link or pencil icon, deselect Hide Configuration Button.

3. When you finish revising component properties, click OK.

4. Save your changes, and exit the page editor.

41.4.4.2 Hiding File Previews in Streamed Items

By default, in most cases where an Activity Stream item has an associated file, such as a document or an image, both a file link and a file preview are shown with the item (Figure 41–6).
Activity Stream previews files through either a native web format or through Oracle WebCenter Content slide rendition. The previewer used depends on the mime type of the file to be previewed.

The mime types that use the native web format include the following:

- image
- htm
- text
- pdf

The mime types that use Oracle WebCenter Content slide rendition include the following:

- powerpoint
- powerpnt
- pptx

Note that the mime types shown in these bullet lists are the only mime types that are previewed. Other mime types appear as links.

You can use the Hide Inline Preview property to suppress the file preview, leaving the link for accessing the file should users want to do so.

The Hide Inline Preview property is provided with the Activity Stream task flow.

To hide a file preview in streamed items:

1. Open the Component Properties dialog for the Activity Stream task flow instance you want to configure.

   **See Also:**  Section 14.3.2, "Setting Properties on a Component"

2. In the Component Properties dialog, on the Parameters tab, select Hide Inline Preview.

   **Note:** To show file previews, deselect Hide Inline Preview.

3. When you finish revising component properties, click OK.

4. Save your changes, and exit the page editor.
41.4.4.3 Preventing Users from Commenting on Streamed Items

By default, a Comment 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**

![Image](image1)

Karen Walker changed the document Member Meeting Schedule.htm Philatelists · Comment Like · Share · 56 minutes ago

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. Open the Component Properties dialog for the Activity Stream task flow instance you want to configure.

   **See Also:** Section 14.3.2, "Setting Properties on a Component"

2. In the Component Properties dialog, on the Parameters tab, select Hide Comments.

   **Note:** To show the Comment link on streamed items, deselect Hide Comments.

3. When you finish revising component properties, click OK.

4. Save your changes, and exit the page editor.

41.4.4.4 Preventing Users from Liking Streamed Items

By default, a Like link is shown with all items in an Activity Stream task flow to enable users to express a favorable opinion of a given item (Figure 41–8).

**Figure 41–8  Like Link on a Streamed Item**

![Image](image2)

Karen Walker changed the document Member Meeting Schedule.htm Philatelists · Comment Like · Share · 56 minutes ago

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. Open the Component Properties dialog for the Activity Stream task flow instance you want to configure.

   **See Also:** Section 14.3.2, "Setting Properties on a Component"
2. In the Component Properties dialog, on the Parameters tab, select Hide Like.

Note: To show the Like link on streamed items, deselect Hide Like.

3. When you finish revising component properties, click OK.

4. Save your changes, and exit the page editor.

41.4.4.5 Preventing Users from Sharing Streamed Items

By default, a Share menu is shown with all items in an Activity Stream task flow to enable users to share a streamed item with their connections (Figure 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. Open the Component Properties dialog for the Activity Stream task flow instance you want to configure.

See Also: Section 14.3.2, "Setting Properties on a Component"

2. In the Component Properties dialog, on the Parameters tab, select Hide Share.

Note: To show the Share option on streamed items, deselect Hide Share.

3. When you finish revising component properties, click OK.

4. Save your changes, and exit the page editor.

41.4.4.6 Hiding Home Portals Options in Activity Stream Task Flows

By default, users see Portals options on the Settings tab of the Activity Stream and Activity Stream - Quick View Options dialogs (Figure 41–10). 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

You can use the Hide Portal Options property 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. Open the Component Properties dialog for the Activity Stream task flow instance you want to configure.

   See Also: Section 14.3.2, "Setting Properties on a Component"

2. In the Component Properties dialog, on the Parameters tab, select Hide Portals Options.

   Note: To show the Portals options, deselect Hide Portals Options.

3. When you finish revising component properties, click OK.

4. Save your changes, and exit the page editor.

41.4.4.7 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 the "Tracking Portal Activities" chapter in Using 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. Open the Component Properties dialog for the Activity Stream task flow instance you want to configure.

   **See Also:** Section 14.3.2, "Setting Properties on a Component"

2. In the Component Properties dialog, on the Parameters tab, 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 properties, click OK.
4. Save your changes, and exit the page editor.

### 41.4.4.8 Limiting the Stream to One or More Services

Configuration options for both the Activity Stream and Activity Stream - Quick View task flows provide a means of selecting the service categories from which to stream activities (see the "Tracking Portal Activities" chapter in *Using 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 documents, and only those connections’ activities that stream from the Documents tool are shown in the task flow instance.

To limit streamed activities to one or more services:

1. Open the Component Properties dialog for the Activity Stream task flow instance you want to configure.

   **See Also:** Section 14.3.2, "Setting Properties on a Component"

2. In the Component Properties dialog, on the Parameters tab, in the Service Categories field, enter a comma-separated list of the services from which to stream activities in this task flow instance.

   **Tip:** Enter the service category ID or the service ID. For a list of valid service IDs, see the "Service IDs" table in *Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper*.

3. When you finish revising component properties, click OK.
4. Save your changes, and exit the page editor.

### 41.4.4.9 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. Open the Component Properties dialog for the Activity Stream task flow instance you want to configure.

   **See Also:** Section 14.3.2, "Setting Properties on a Component"
2. In the Component Properties dialog, on the Parameters tab, select Profile Only.

   **Note:** To show a user’s own activities and those of their connections, deselect Profile Only.

3. When you finish revising component properties, click OK.
4. Save your changes, and exit the page editor.

### 41.5 Working with Activity Stream Task Flows

For information about how users work with Activity Stream task flows, see the "Tracking Portal Activities” chapter in *Using Oracle WebCenter Portal*.

### 41.6 About Recent Activities

The Recent Activities task flow links to the additions and revisions to some tools and services available to your application.

Tracked changes include additions and revisions to pages, documents, discussion forums, lists, and events (Figure 41–11).

**Figure 41–11  The Recent Activities Task Flow**

By default, the Recent Activity list displays 25 recent activities for a given tool or service. If more than 25 activities have occurred, then the Recent Activity list displays the 25 most recent. System administrators can change the default value, so the limit may be more or less than 25. For more information, see Section 41.4, "Setting Activity Stream Task Flow Properties.”

The level of information provided in the Recent Activity list depends on the context in which the list is placed. For example, in a Portal Portal Framework application, changes are tracked on all applicable services across the entire application.

In a portal page, the Recent Activity list summarizes changes occurring in that portal. In a personal portal, the Recent Activities task flow must have a portal specified (see Section 41.8, "Setting Recent Activities Task Flow Properties”). The Recent Activity list summarizes changes occurring in the specified portal.

You can use the Recent Activity list as an access point to new and revised content. The Recent Activity list displays new and revised content as links, which you can click to go directly to the content.

### 41.7 Adding a Recent Activities Task Flow to a Page

For the steps to add a Recent Activities task flow to a page, see Section 14.2, "Adding a Component to a Page.”
Tip: The presence or location of the Recent Activities task flow in the resource catalog, where it is labeled *Activity Stream - Quick View*, depends on how the resource catalog is configured. For example, in the Default Portal Catalog, the Activity Stream - Quick View task flow is included under the *Alerts and Updates* folder.

### 41.8 Setting Recent Activities Task Flow Properties

The Recent Activities task flows have associated properties, which users with sufficient privileges can access through the Component Properties dialog in Oracle WebCenter Portal’s Composer (Figure 41–12).

*Figure 41–12 Recent Activities Task Flow Component Properties*

![Component Properties: Recent Activities](image)

For information about accessing the Component Properties dialog, see Section 14.3.2, "Setting Properties on a Component."

The following sections provide information about properties of the Recent Activities task flow and describe the properties on the Parameters tab:

- Section 41.8.1, "About the Recent Activities Task Flow Properties"
- Section 41.8.2, "Recent Activities Task Flow Parameters"

#### 41.8.1 About the Recent Activities Task Flow Properties

When you set property values on a Recent Activities task flow, you are affecting only the task flow instance on which the value is set. Other instances of the same task flow are not affected by such changes.

The properties on the **Parameters** tab of the Component Properties dialog can affect the default task flow content. For descriptions of the parameters on this tab, see Section 41.8.2, "Recent Activities Task Flow Parameters." For some task flows, parameters on this tab facilitate the wiring of the task flow to page parameters and
page definition variables. For more information, see Chapter 19, "Wiring Pages, Task Flows, Portlets, and ADF Components."

Changes to the properties on the **Display Options, Style, and Content Style** tabs affect the appearance and behavior of the task flow. These properties are common to all task flows. For more information, see Section 14.3.4, "Working with Component Display Options" and Section 14.3.6, "Working with Style and Content Style Properties."

The content of the **Events** tab depends on the events supported by the task flow. For more information, see Section 14.3.7, "Working with Component Contextual Events."

All properties on the **Parameters** and **Display Options** tabs provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the \( \downarrow \) 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 the "Expression Language Expressions" appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

---

**Note:** When you enter EL on the generic **Display Options** tab in the Component Properties 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 14–1, "Display Options Properties".

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

---

### 41.8.2 Recent Activities Task Flow Parameters

Table 41–6 describes the parameters that are unique to the Recent Activities task flow.
### Table 41–6 Recent Activities Task Flow Parameters

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
</table>
| Group Space Name              | Applicable in WebCenter Portal only. Leave this field blank if the task flow is on a Portal Framework application page. Use this parameter to specify the portal for which to display recent activities. On a personal portal page, use this to narrow the range of displayed activities. Rather than tracking activities application-wide—the default behavior—you can, for example, set a Constant value of a particular portal's display name. On a portal page, use this parameter to display some other portal's recent activities or to display recent activities for all portals. Valid values include:  
  - The display name or GUID of the portal to search  
  - null (empty), to search according to the contextual default  
    Use for portal pages only. An empty value on a portal page searches the current portal.  
    Note: Always specify a value on a personal page. An empty value does not return any results. If no value is specified, then the following message displays in the Recent Activities task flow: Recent Activity in the Home Portal requires a groupSpace taskflow parameter value to use for the search.  
  - defaultScope (or the defaultScope GUID), to search all portals |
| Long Time Period in minutes   | Defaults to Last 7 Days on the Recent Activity Show menu. Used for defining the time range between Medium and Longest within which activities are displayed on the Recent Activity list. Valid values include:  
  - TODAY—Activities that have occurred since midnight in the currently selected time zone display on the Recent Activity list.  
  - YESTERDAY—Activities that have occurred since midnight yesterday in the currently selected time zone display on the Recent Activity list.  
  - A number of minutes—Activities that have occurred within the specified number of minutes display on the Recent Activity list. For example, a value of 60 renders as Last Hour on the Show menu. A value of 1440 is rendered as Last Day.  
  Example values:  
  - Constant: TODAY (Displays all activity since midnight)  
  - Constant: 2880 (Displays all activity within the last 2880 minutes. This is displayed as Last 2 Days on the Show menu.)  
  - EL Expression: ${myAppBean.timePeriod} (Displays based on the value from the given Bean property 'timePeriod') |
Table 41–6 (Cont.) Recent Activities Task Flow Parameters

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
</table>
| Longest Time Period in minutes   | Defaults to Last 30 Days on the Recent Activity Show menu. For defining the longest range of time within which activities are displayed on the Recent Activity list. Valid values include:  
  ■ TODAY—Activities that have occurred since midnight in the currently selected time zone display on the Recent Activity list.  
  ■ YESTERDAY—Activities that have occurred since midnight yesterday in the currently selected time zone display on the Recent Activity list.  
  ■ A number of minutes—Activities that have occurred within the specified number of minutes display on the Recent Activity list. For example, a value of 60 renders as Last Hour on the Show menu. A value of 1440 is rendered as Last Day.  
  Example values:  
  Constant: TODAY (Displays all activity since midnight)  
  Constant: 2880 (Displays all activity within the last 2880 minutes. This is displayed as Last 2 Days on the Show menu.)  
  EL Expression: ${myAppBean.timePeriod} (Displays based on the value from the given Bean property 'timePeriod') |
| Medium Time Period in minutes    | Defaults to Yesterday on the Recent Activity Show menu. For defining the time range between Short and Long within which activities are displayed on the Recent Activity list. Valid values include:  
  ■ TODAY—Activities that have occurred since midnight in the currently selected time zone display on the Recent Activity list.  
  ■ YESTERDAY—Activities that have occurred since midnight yesterday in the currently selected time zone display on the Recent Activity list.  
  ■ A number of minutes—Activities that have occurred within the specified number of minutes display on the Recent Activity list. For example, a value of 60 renders as Last Hour on the Show menu. A value of 1440 is rendered as Last Day.  
  Example values:  
  Constant: TODAY (Displays all activity since midnight)  
  Constant: 2880 (Displays all activity within the last 2880 minutes. This is displayed as Last 2 Days on the Show menu.)  
  EL Expression: ${myAppBean.timePeriod} (Displays based on the value from the given Bean property 'timePeriod') |
Adding Activities to a Portal

41.9 Working with the Recent Activities Task Flow

For information about how users work with the Recent Activities task flow, see the "Tracking Portal Activities" chapter in Using Oracle WebCenter Portal.

41.10 About Publisher

The Publisher task flow provides a means of publishing messages, files, and URLs to the Activity Streams of all of your connections or to those connections who have access to a specified portal. Publisher also has an associated property, Is Update Status, that enables users to publish a message as their Profile status message.

See Also: For information about Activity Stream, see Section 41.2, "About the Activity Stream." For information about Profiles, see Chapter 53, "Adding Profiles to a Portal." For information about properties associated with the Publisher task flow, see Section 41.12, "Setting the Publisher Task Flow Properties."

The Publisher task flow is very similar in operation to Message Board task flows (see Chapter 49, "Adding Messages and Feedback to a Portal"). It differs in a few ways:

- You can use it to send out messages, but not to receive them. It provides no feature for viewing messages.
- It is specifically made to work in conjunction with Activity Stream, where the messages you enter are published.
- It has its own distinct set of properties (see Section 41.12, "Setting the 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:** Chapter 53, "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 41–13) or just show options for sharing documents (Figure 41–14).

**Figure 41–13 Publisher Task Flow**

![Publisher Task Flow](image)

In default WebCenter Portal installations, the Publisher task flow is placed on the Activities business role page, which is 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:** The "Managing Business Role Pages" chapter in *Administering Oracle WebCenter Portal*

### 41.11 Adding a Publisher Task Flow to a Page

For the steps to add a Publisher task flow to a page, see Section 14.2, "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 Portal Catalog, the Publisher task flow is included under the Social and Communication folder.
41.12 Setting the Publisher Task Flow Properties

The Publisher task flow has associated properties, which users with sufficient privileges can access through the Component Properties dialog in Composer (Figure 41–15).

Figure 41–15 Publisher Parameters in the Component Properties Dialog

See Also:  Section 14.3.2, "Setting Properties on a Component"

The following sections provide information about properties associated with the Publisher task flow and describe the properties available on the Parameters tab:

- Section 41.12.1, "About Publisher Task Flow Properties"
- Section 41.12.2, "Publisher Task Flow Parameters"
- Section 41.12.3, "Prohibiting File Uploads Through a Publisher Task Flow Instance"
- Section 41.12.4, "Limiting the Scope of Recipients"
- Section 41.12.5, "Using the Publisher as a Profile Status Updater"
- Section 41.12.6, "Using the Publisher as a File Uploader"

41.12.1 About Publisher Task Flow Properties

When you set property values on the Publisher task flow, you are affecting only the task flow instance on which the value is set. Other instances of the same task flow are not affected by such changes.

The properties on the Parameters tab of the Component Properties dialog can affect the default task flow content. For descriptions of the parameters on this tab, see Section 41.12.2, "Publisher Task Flow Parameters." For some task flows, parameters on this tab facilitate the wiring of the task flow to page parameters and page definition.
variables. For more information, see Chapter 19, "Wiring Pages, Task Flows, Portlets, and ADF Components."

Changes to the properties on the Display Options, Style, and Content Style tabs affect the appearance and behavior of the task flow. These properties are common to all task flows. For more information, see Section 14.3.4, "Working with Component Display Options" and Section 14.3.6, "Working with Style and Content Style Properties."

The content of the Events tab depends on the events supported by the task flow. For more information, see Section 14.3.7, "Working with Component Contextual Events."

All properties on the Parameters and Display Options tabs provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the 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 the "Expression Language Expressions" appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

---

**Note:** When you enter EL on the generic Display Options tab in the Component Properties 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 14–1, ”Display Options Properties". EL validation is not performed on non-generic display options.

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### 41.12.2 Publisher Task Flow Parameters

Table 41–7 describes the parameters that are unique to the Publisher task flow.

**Table 41–7  Publisher Task Flow Parameters**

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Hide Attach Links</strong></td>
<td>Specifies whether the Attach: File</td>
</tr>
<tr>
<td></td>
<td>Select to hide the Attach: File</td>
</tr>
<tr>
<td></td>
<td>Deselect to show the Attach: File</td>
</tr>
<tr>
<td></td>
<td>The Attach: File</td>
</tr>
<tr>
<td><strong>Hide Document Uploader</strong></td>
<td>Specifies whether the File link is available on the task flow for uploading a document</td>
</tr>
<tr>
<td></td>
<td>Select to hide the File link.</td>
</tr>
<tr>
<td></td>
<td>Deselect to show the File link. The File link will show only if the Attach: File</td>
</tr>
<tr>
<td></td>
<td>The File link is shown by default.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> Do not select this option if the Upload Document Only option is selected. If you select both options, Publisher displays no controls.</td>
</tr>
<tr>
<td><strong>Hide Sharing Picker</strong></td>
<td>Specifies whether the Share with menu is shown or hidden</td>
</tr>
<tr>
<td></td>
<td>Select to hide the Share with menu.</td>
</tr>
<tr>
<td></td>
<td>Deselect to show the Share with menu.</td>
</tr>
<tr>
<td></td>
<td>The Share with menu is shown by default.</td>
</tr>
</tbody>
</table>
### Table 41–7 (Cont.) Publisher Task Flow Parameters

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Is Update Status</strong></td>
<td>Indicates whether the message entered in the task flow instance should also be published as the user’s Profile status message</td>
</tr>
<tr>
<td></td>
<td>- Select to publish the message as the user’s Profile status message and in the selected recipients’ Activity Streams.</td>
</tr>
<tr>
<td></td>
<td>- Deselect to publish the message only in the selected recipients’ Activity Streams.</td>
</tr>
<tr>
<td></td>
<td>If you attach a file or URL to a published message, then the message is not used as a Profile status message, even if <strong>Is Update Status</strong> is selected.</td>
</tr>
<tr>
<td></td>
<td>For information about Profiles, see Chapter 53, &quot;Adding Profiles to a Portal.&quot;</td>
</tr>
<tr>
<td><strong>Keep open the Publisher after publish</strong></td>
<td>Specifies whether Publisher remains open after a user clicks the Publish button</td>
</tr>
<tr>
<td></td>
<td>- Select to keep the text box open after a message is published.</td>
</tr>
<tr>
<td></td>
<td>- Deselect to close the Publisher controls after a message is published.</td>
</tr>
<tr>
<td></td>
<td>Publisher remains open after a message is published by default.</td>
</tr>
<tr>
<td><strong>Message key of hints text</strong></td>
<td>Specifies the resource bundle class and message key for hint text</td>
</tr>
<tr>
<td></td>
<td>Use the format <strong>key[,RBClass].<strong>EMPTY</strong></strong> as the predefined key for no hint text. This is the default value.</td>
</tr>
<tr>
<td><strong>Object Id</strong></td>
<td>The ID of the object to be shared</td>
</tr>
<tr>
<td></td>
<td>This property value assists in generating a link for use in navigating to the published object.</td>
</tr>
<tr>
<td></td>
<td>It is not necessary to provide a value, unless you plan to do so using an EL expression.</td>
</tr>
<tr>
<td></td>
<td>If you need EL assistance, an application developer can provide an EL expression; see the</td>
</tr>
<tr>
<td></td>
<td>&quot;Expression Language Expressions&quot; appendix in <em>Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper</em>.</td>
</tr>
<tr>
<td><strong>Object Type</strong></td>
<td>The type of object to be shared</td>
</tr>
<tr>
<td></td>
<td>This property value assists in generating a link for use in navigating to the published object.</td>
</tr>
<tr>
<td></td>
<td>It is not necessary to provide a value, unless you plan to do so using an EL expression.</td>
</tr>
<tr>
<td></td>
<td>If you need EL assistance, an application developer can provide an EL expression; see the</td>
</tr>
<tr>
<td></td>
<td>&quot;Expression Language Expressions&quot; appendix in <em>Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper</em>.</td>
</tr>
<tr>
<td><strong>Scope Id</strong></td>
<td>The ID of the scope to which to publish</td>
</tr>
<tr>
<td></td>
<td>This property value assists in generating a link for use in navigating to the published object.</td>
</tr>
<tr>
<td></td>
<td>It is not necessary to provide a value, unless you plan to do so using an EL expression.</td>
</tr>
<tr>
<td></td>
<td>If you need EL assistance, an application developer can provide an EL expression; see the</td>
</tr>
<tr>
<td></td>
<td>&quot;Expression Language Expressions&quot; appendix in <em>Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper</em>.</td>
</tr>
<tr>
<td><strong>Service Id</strong></td>
<td>The service ID of the service to which the shared object belongs</td>
</tr>
<tr>
<td></td>
<td>This property value assists in generating a link for use in navigating to the published object.</td>
</tr>
<tr>
<td></td>
<td>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 the &quot;Service IDs&quot; table in <em>Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper</em>. If you need EL assistance, an application developer can provide an EL expression; see the &quot;Expression Language Expressions&quot; appendix in <em>Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper</em>.</td>
</tr>
</tbody>
</table>
### 41.12.3 Prohibiting File Uploads Through a Publisher Task Flow Instance

You can use the Hide Document Uploader property to omit the display of the Attach: File option on a Publisher task flow instance. Users will be able to share links but not files.

To prohibit file uploads through a Publisher task flow instance:

1. Open the Component Properties dialog for the Publisher task flow instance you want to configure.

   **See Also:** Section 14.3.2, "Setting Properties on a Component"

2. In the Component Properties dialog, on the Parameters tab, select Hide Document Uploader.

   **Note:** To show the Attach: File option, deselect Hide Document Uploader.

3. When you finish revising component properties, click OK.

4. Save your changes, and exit the page editor.

### 41.12.4 Limiting the Scope of Recipients

You can use the Space Name property to limit the scope of recipients of published messages to a user's connections in a particular portal. When you do this, the message...
does not even stream to your own view of the Activity Stream in the Home portal. It 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. Open the Component Properties dialog for the Publisher task flow instance you want to configure.

   **See Also:** Section 14.3.2, "Setting Properties on a Component"

2. In the Component Properties dialog, on the Parameters tab, 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.

3. When you finish revising component properties, click OK.

4. 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.

### 41.12.5 Using the Publisher as a Profile Status Updater

You can use the Is Update Status property to specify that all messages without attachments are published not only to specified recipients, but also as the user's Profile status message (Figure 41–16).

**Figure 41–16 Published Message Used as Profile Status**

Messages that have an attached file or link are not simultaneously published as a Profile status message.

To specify that messages are also published as Profile status messages:

1. Open the Component Properties dialog for the Publisher task flow instance you want to configure.

   **See Also:** Section 14.3.2, "Setting Properties on a Component"

2. In the Component Properties dialog, on the Parameters tab, select Is Update Status.

   **Note:** To prevent messages posted through Publisher from being published as a user's Profile status message, deselect Is Update Status.
3. When you finish revising component properties, 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.

### 41.12.6 Using the Publisher as a File Uploader

You can use the **Upload Document Only** property to limit the functionality of the Publisher task flow to a file uploader (Figure 41–17).

*Figure 41–17 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. Open the Component Properties dialog for the Activity Stream task flow instance you want to configure.

   **See Also:** Section 14.3.2, "Setting Properties on a Component"

2. In the Component Properties dialog, on the **Parameters** tab, select **Upload Document Only**.

   **Note:** To show the message and link controls, deselect **Upload Document Only**.

3. When you finish revising component properties, click **OK**.

4. Save your changes, and exit the page editor.
The Publisher task flow instance renders as a file uploader (see Figure 41–17). The text area and the Share link icon are not rendered.

41.13 Working with the Publisher Task Flow

For information about how users work with the Publisher task flow, see the "Liking, Commenting On, and Sharing Items in WebCenter Portal" chapter in *Using Oracle WebCenter Portal*. 
This chapter describes how administrators and portal moderators can add and configure task flows to portal pages that provide traffic and usage metrics for themselves and other business users.

This chapter includes the following topics:

- Section 42.1, "About Analytics"
- Section 42.2, "Adding an Analytics Task Flow to a Page"
- Section 42.3, "Setting Analytics Task Flow Properties"
- Section 42.4, "Working with Analytics Task Flows"

**Permissions:** To perform the tasks in this chapter, you need the portal-level permission Manage Security and Configuration or Manage Configuration. A portal moderator has this permission by default.

Any user who accesses administration settings for a portal and does not have Manage permission (for example, a user with Participant role, granted permission to edit a page in the portal) will see only the settings available to their role and permissions.

For more information about permissions, see Section 29.1, "About Roles and Permissions for a Portal."

### 42.1 About Analytics

Analytics allows system administrators and portal moderators 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.
This section contains the following topics:

- Section 42.1.1, "Understanding the Analytics Administration Page in WebCenter Portal"
- Section 42.1.2, "Understanding Analytics Task Flows in WebCenter Portal"
- Section 42.1.3, "Access to Analytics Task Flows in WebCenter Portal"

### 42.1.1 Understanding the Analytics Administration Page in WebCenter Portal

An analytics console that displays metrics for the entire WebCenter Portal application is available to system administrators with the Manage Configuration permission. The console consists of four pages, grouping several different reports:

- **Summary Metrics** - portal traffic, page views, and login metrics
- **Portal Metrics** - portal usage and response times
- **Portlet Metrics** - portlet views and response times
- **Service Metrics** - search usage, documents, wikis, blogs and discussions

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**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.
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. See also, “Specifying the Target Audience for a Business Role Page” in Administering Oracle WebCenter Portal.

42.1.2 Understanding Analytics Task Flows in WebCenter Portal

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 Instances 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 Section 42.4.1, "Customizing Analytics Reports" and Section 42.4.2, "Personalizing Your Analytics Report View."

42.1.2.1 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, discussion forum views, and document views.

Figure 42–2  Analytics Task Flow - WebCenter Traffic
42.1.2.2 Page Traffic (Administrator)

The Page Traffic task flow (Figure 42–3) displays the number of page hits and the number of unique users that have visited any portal page.

Use this task flow to quickly see the most visited pages (top pages) and/or the least visited pages (bottom pages). You can view page data by hits (total number of page views) and/or users (unique number of users who viewed pages). You can filter the report to show data only for specific pages (in the Display options list, select Specify, then click Select, select pages, then click OK) or pages from specific portals (in the WebCenter Portal query options).

**Figure 42–3 Analytics Task Flow - Page Traffic**

![Page Traffic Task Flow](image)

**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.

42.1.2.3 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.
42.1.2.4 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.

**Note:** The Home Portal is not included in the data.
42.1.2.5 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.

**Note:** The Home portal is not included in the data.
42.1.2.6 Portlet Instances Response Time (Administrator)

The Portlet Instances 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.
42.1.2.7 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
Adding an Analytics Task Flow to a Page

42.1.3 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
- **Moderators** - Within a portal, members with the *Moderator* 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.

42.2 Adding an Analytics Task Flow to a Page

For the steps to add an Analytics task flow to a page, see Section 14.2, "Adding a Component to a Page."

**Tip:** The presence or location of this component depends on how the resource catalog is configured. For example, in the Default Portal 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.

42.3 Setting Analytics Task Flow Properties

The Analytics task flows have associated properties, which users with sufficient privileges can access through the Component Properties dialog in Composer (Figure 42–9).
Figure 42–9  Analytics Task Flow - Component Properties

For information about accessing the Component Properties dialog, see Section 14.3.2, “Setting Properties on a Component.”

The following sections provide information about properties of the Analytics task flows and describe the properties on the Parameters tab:

- Section 42.3.1, “About the Analytics Task Flow Properties”
- Section 42.3.2, “Analytics Task Flow Parameters”

42.3.1 About the Analytics Task Flow Properties

The properties on the Parameters tab of the Component Properties dialog control the default task flow content. For descriptions of the parameters on this tab, see Section 42.3.2, “Analytics Task Flow Parameters.” For some task flows, parameters on this tab facilitate the wiring of the task flow to page parameters and page definition variables. For information about wiring pages and components, see Chapter 19, "Wiring Pages, Task Flows, Portlets, and ADF Components.”

Changes to the properties on the Display Options, Style, and Content Style tabs affect the appearance and behavior of the task flow for all users. These properties are common to all task flows. For more information, see Section 14.3, "Modifying Component Properties.”

The contents of the Events tab depend on the events supported by the task flow. For more information, see Section 14.3.7, "Working with Component Contextual Events.”

All properties on the Parameters and Display Options tabs provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the expression builder 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 the "Expression Language Expressions" appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

### 42.3.2 Analytics Task Flow Parameters

Table 42–1 describes the parameters that are unique to the Analytics task flows.

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
</table>
| Analytics Report Title | Specifies the display title that appears above the analytics data.  
**Note:**  
- Use the Analytics Report Title rather than the Text property on the Display Options page. Changing the Text value has no effect on Analytics task flows.  
- You cannot change the report titles in the Analytics console. |
| Analytics Resource Id | Specifies the MDS document used to store user customizations/application customizations for the task flow instance in MDS.  
**Warning:** Do not edit this value. |
| Application Name* | Specifies the WebCenter Portal application for which you want to display analytics data. For 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 WebCenter Portal applications. |
| Max Data Points Per Series | Indicates the maximum number of data points to be displayed in a bar or line chart. The default value is 25. Valid values are between 1 and 1000.  
**Note:** Increasing the number of data points might increase the time it takes to render the report. |

### 42.4 Working with Analytics Task Flows

This section contains the following topics:

- Section 42.4.1, "Customizing Analytics Reports"
- Section 42.4.2, "Personalizing Your Analytics Report View"
42.4.1 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 Edit mode will become the default report settings for all users in page View mode. For example, you can edit the Analytics page, changing the following settings on the Summary Metrics page in the Traffic report: set the report type to pie chart, set the time frame to this week, and remove Discussion Forums from the display. When users visit the Analytics page, those settings will be applied by default. Users can then edit the report as necessary for their needs. This can be useful if there are particular settings you know are commonly used by your users, or to customize a particular instance of an Analytics task flow on a group-specific page.

You can also configure the report settings to determine the controls available to users in View mode. In 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, Discussion Forum Metrics) allows you to show or hide the Specify option in the Display list and the Select button at the top of the report
  - **Additional Options** (not available with Traffic, Logins, 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, Discussion Forum Metrics) allows you to show or hide the Additional Options section to the left of the report

- **Filtering**
  - **Time Frame Filters** allows you to show or hide the Time Frame section to the left of the report
  - **User Property Filters** allows you to show or hide the User Property section to the left of the report
  - **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
42.4.2 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.

42.4.2.1 Report Display Options

The report display options at the top of the report enable you to select the type of report, select the type of metrics to include, and, for some task flows, control the top/bottom range to display.

Report Types

You can display your report as a bar chart, pie chart, line chart, or table depending on the display and query options you select. To 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

<table>
<thead>
<tr>
<th>Selected Metrics</th>
<th>Group By Option</th>
<th>Bar</th>
<th>Pie</th>
<th>Line</th>
<th>Table</th>
</tr>
</thead>
<tbody>
<tr>
<td>Single metric</td>
<td>No selection</td>
<td>N</td>
<td>N</td>
<td>N</td>
<td>Y</td>
</tr>
<tr>
<td>Login Traffic task flow</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Single metric</td>
<td>No selection</td>
<td>Y</td>
<td>Y</td>
<td>N</td>
<td>Y</td>
</tr>
<tr>
<td>All other task flows</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Single metric</td>
<td>Time interval, user</td>
<td>Y</td>
<td>N</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>All other task flows</td>
<td>property, or Both*</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Multiple metrics</td>
<td>No selection</td>
<td>Y</td>
<td>Y</td>
<td>N</td>
<td>Y</td>
</tr>
<tr>
<td>WebCenter Traffic and Login Traffic task flows</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Multiple metrics</td>
<td>No selection</td>
<td>Y</td>
<td>N</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>All other task flows</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Multiple metrics</td>
<td>Time interval or user</td>
<td>Y</td>
<td>N</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>WebCenter Traffic and Login Traffic task flows</td>
<td>property</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Multiple metrics</td>
<td>Time interval or user</td>
<td>N</td>
<td>N</td>
<td>N</td>
<td>Y</td>
</tr>
<tr>
<td>All other task flows</td>
<td>property</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Multiple metrics</td>
<td>Both*</td>
<td>N</td>
<td>N</td>
<td>N</td>
<td>Y</td>
</tr>
<tr>
<td>Login Traffic task flow</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
* 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, Discussion Forums, 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
- Discussion Forum Metrics: Views, Unique Users

To select which metrics to include in your report, select the metrics from the list above the report.

**Figure 42–10  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.


42.4.2.2 Query Options

Analytics task flows include the following query options to the left of the report:

- **Report Summary**
  
  Displays a summary of the selected display and query options shown in the report.

- **Time Frame**
  
  Enables you to specify the date range for the metrics displayed in the report. You can select from the following options: Yesterday, Today, This Week, Last Week, This Month, Last Month, Last Three Months, Last Six Months, This Year, Last Year, or you can specify your own date range.

- **User Property**
  
  Enables you to filter your report by user property. After selecting a property from the list, you can specify a value that the property must contain or must not contain, and only metrics that apply to the filtered property display in the report.
  
  - **Property**: Select a property on which to filter the report. You can select City, Company, Country, Department, Display Name, Employee ID, IM User, Manager, Phone, State or Province, Street, Title, or ZIP code
  
  - **Operator**: Select how you want to filter the property. You can select **Contains** or **Does Not Contain**.
  
  - **Value**: Type a value on which to filter the property.

---

**Note**: To search using a wildcard (for example, % or ?), you must prefix the wildcard with a forward slash (/). For example, to search for give or giving, type `giv\%` in the **Value** box.

---

- **Additional Options**
  
  Enables you to include Home 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**

---

42-16  Oracle Fusion Middleware Building Portals with Oracle WebCenter Portal
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).
Adding Announcements to a Portal

This chapter describes the announcements feature and how to set up announcements in a portal for participants. Announcements offer a quick, convenient way to create and broadcast messages instantly or at a specified future time. Portal moderators provide portal participants with access to the Announcements task flows or page (console).

This chapter includes the following topics:

- Section 43.1, "Prerequisites for Announcements"
- Section 43.2, "About Announcements"
- Section 43.3, "Modifying Announcement Forum Settings for a Portal"
- Section 43.4, "Adding an Announcements Page to a Portal"
- Section 43.5, "Adding an Announcements Task Flow to a Page"
- Section 43.6, "Setting Announcements Task Flow Properties"
- Section 43.7, "Working with the Announcements Task Flow"

Permissions: To perform the tasks in this chapter, you need the portal-level permission Manage Security and Configuration or Manage Configuration. A portal moderator has this permission by default.

Additionally, you need the following permissions:

- Create, Edit, and Delete Announcements or Create and Edit Announcements

- To add the announcements task flows to a page, you need the portal-level permission Basic Services: Edit Page Access, Structure, and Content (simple permissions) or Create, Edit, and Delete Pages (advanced permissions).

For more information about portal-level permissions, see Section 29.1, "About Roles and Permissions for a Portal."

43.1 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 the "Managing Announcements and Discussions" chapter in Administering Oracle WebCenter Portal.

---

**See Also:** "Troubleshooting Issues with Announcements and Discussions" section in Administering Oracle WebCenter Portal.

---

To make announcements available in a portal, the portal moderator 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 Section 39.2, "Enabling and Disabling Tools and Services Available to a Portal."
- Optionally, modify announcement forum settings, as described in Section 43.3, "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 Section A.7, "Pretty URLs for Pages in a Specified Portal").
  - Add a page link to the Announcements page in the portal navigation (see Section 43.4, "Adding an Announcements Page to a Portal").
  - Add the Announcements task flow to a page in the portal (see Section 43.5, "Adding an Announcements Task Flow to a Page").

---

**Note:** For information about the announcements feature and how to use announcements, see Section 43.7, "Working with the Announcements Task Flow."

---

### 43.2 About Announcements

WebCenter Portal provides the ability to post announcements about important activities and events to all authenticated users. For example, an application specialist can announce the availability of a new feature or the plan to take a portal offline temporarily for maintenance or the system administrator can announce the plan to shut down WebCenter Portal for maintenance (Figure 43–1).

**Figure 43–1 Sample Announcement in the Announcements - Quick View Task Flow**

Announcements are integrated with many other features, such as Activity Stream, RSS, and Instant Messaging 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 are searchable with Oracle WebCenter Portal.
live search, and announcement titles and text are searchable with Oracle Secure Enterprise Search.

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 Section 39.2, "Enabling and Disabling Tools and Services Available to a Portal." The Announcements task flow must also be in your resource catalog. For information see Section 23.5.1, "Adding a Resource to a Resource Catalog."

As the portal moderator, 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 Section A.7, "Pretty URLs for Pages in a Specified Portal."
- By creating an Announcements page in the portal, as described in Section 43.4, "Adding an Announcements Page to a Portal."
- By adding the task flows to a portal page, as described in Section 43.5, "Adding an Announcements Task Flow to a Page."

### 43.3 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 Section 39.2, "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 the "Managing Announcements and Discussions" chapter in Administering Oracle WebCenter Portal.

To modify the announcement forum settings for a portal:

1. On the Tools and Services page (see Section 7.8.1, "Accessing Tools and Services Administration for a Portal"), select Announcements (Figure 43–2).

   Note the default forum ID specified for the portal.
Adding an Announcements Page to a Portal

2. Click **Choose a forum for Portal** icon next to the Forum ID field if you want to change the default Forum ID.

   See Section 46.4, "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 participants with the required permissions to work with announcements.

4. Click **Save**.

43.4 Adding an Announcements Page to a Portal

To provide navigation to the **Announcements** page in a portal, you can add a page link to the portal navigation, as described in Section 13.2, "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.
43.5 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 Section 14.2, "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 Section 23.5.1, "Adding a Resource to a Resource Catalog" (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 Section 7.3.5, "Changing the Resource Catalogs for Pages and the Page Template for a Portal."

---

The Announcements task flow is displayed on your page, as shown in Figure 43–3.

**Figure 43–3  Announcements - Quick View Task Flow on a Page**

Users with Edit privileges can access the task flow’s region parameter through the Component Properties dialog in Composer to specify the ID of the 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 Section 43.6, "Setting Announcements Task Flow Properties."

43.6 Setting Announcements Task Flow Properties

The Announcements task flows have associated properties, which users with sufficient privileges can access from the Component Properties dialog in Composer (Figure 43–4).
Setting Announcements Task Flow Properties

Figure 43–4  Announcements Task Flow Component Properties

For information about accessing the Component Properties dialog, see Section 14.3, "Modifying Component Properties."

The following sections provide information about properties of Announcements task flows and describe the properties on the Parameters tab.

- Section 43.6.1, "About the Announcements Task Flow Properties"
- Section 43.6.2, "Announcements Task Flow Parameters"

### 43.6.1 About the Announcements Task Flow Properties

The properties on the Parameters tab of the Component Properties dialog control the default task flow content. For descriptions of the parameters on this tab, see Section 43.6.2, "Announcements Task Flow Parameters." For some task flows, parameters on this tab facilitate the wiring of the task flow to page parameters and page definition variables. For more information, see Chapter 19, "Wiring Pages, Task Flows, Portlets, and ADF Components."

Changes to the properties on the Display Options, Style, and Content Style tabs affect the appearance and behavior of the task flow for all users. These properties are common to all task flows. For more information, see Section 14.3, "Modifying Component Properties."

The content of the Events tab depends on the events supported by the task flow. For more information, see Section 14.3.7, "Working with Component Contextual Events."

The Child Components tab displays all of the components contained within the current component. It provides controls for rearranging, showing, and hiding child components. Not all components contain children. So this tab may be omitted. For more information, see Section 14.3.5, "Working with Child Components."

All properties on the Parameters and Display Options tabs provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the ➤ icon next to a property, then select Expression Builder to open the editor.
Note: When you enter EL on the generic Display Options tab in the Component Properties 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 14-1, "Display Options Properties".

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

If you need EL assistance, an application developer can provide an EL expression; see the "Expression Language Expressions” appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

### 43.6.2 Announcements Task Flow Parameters

Table 43–1 describes the properties that are unique to the Announcements task flows.

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
<th>Task Flow</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expand All Announcements in Extended Mini View</td>
<td>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.</td>
<td>Announcements - Quick View</td>
</tr>
</tbody>
</table>
| 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 Section 19, "Wiring Pages, Task Flows, Portlets, and ADF 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 |
Working with the Announcements Task Flow

43.7 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 moderator, you can perform all the tasks with announcements:

- View announcements in the Announcements task flow—All participants in Home portals and portal moderators. For more information, see Section 43.7.1, "Viewing Announcements in the Announcements Task Flow" and Section 43.7.2.1, "Viewing Announcements in the Quick View Task Flow."
- Create announcements—All participants. For more information, see the "Creating an Announcement" section in Using Oracle WebCenter Portal.

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
<th>Task Flow</th>
</tr>
</thead>
<tbody>
<tr>
<td>Forum ID</td>
<td>The ID of the forum under which announcements are created in the back-end discussions server. 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.</td>
<td>Announcements - Quick View, Announcements</td>
</tr>
</tbody>
</table>
| Announcement Length | The number of characters to show in announcement details. Use only when Content View Only is deselected. If no value is specified, then WebCenter Portal displays 200 characters. This parameter takes effect with Number of Expanded Announcements. Express values using the following formats:  
  - Constant—Express a constant value, such as 200 or 500.  
  - Page parameter—Enter a page parameter to grab the value from the page on which the task flow is placed. For more information, see Section 19, "Wiring Pages, Task Flows, Portlets, and ADF Components."
  - EL expression—The default. Enter an Expression Language (EL) expression. The value you enter for Announcement Length is ignored if Content View Only is selected. | Announcements - Quick View |
| Number of Announcements to Show | The number of announcements to show on the quick view. | Announcements - Quick View |
Working with the Announcements Task Flow

Adding Announcements to a Portal

- Edit announcements—Creator of the announcement, discussions server administrators in Home portals, and portal moderators. For more information, see the "Editing Announcements" section in Using Oracle WebCenter Portal.

  **Note:** If participants have Create, Edit, and Delete Announcements permissions, they can edit any announcement in the portals in which they have access. If they have Create and Edit Announcements permissions, they can edit only those announcements that they created.

- Delete announcements—Discussions server system administrators in Home portals and portal moderators. For more information, see the "Deleting an Announcement" section in Using Oracle WebCenter Portal.

  **Note:** If participants have Create, Edit, and Delete Announcements permissions, they can delete any announcement in the portals in which they have access. If they have Create and Edit Announcements permissions, they can delete only those announcements that they created.

- Send mail—All participants. For more information, see the "Sending Mail from an Announcement" section in Using Oracle WebCenter Portal.

- Find or create links—All participants. For more information, see the "Linking Announcements" section in Using Oracle WebCenter Portal.

This section contains the following subsections:

- Section 43.7.1, "Viewing Announcements in the Announcements Task Flow"
- Section 43.7.2, "Working with the Announcements - Quick View Task Flow"

### 43.7.1 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, by default, is displayed only to users with manage privilege.

Discussions server administrators in Home portals and portal moderators 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 43–5** shows some announcements in the Announcements task flow.
43.7.2 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: Section 43.6, "Setting Announcements Task Flow Properties"

This section contains the following subsections:

- Section 43.7.2.1, "Viewing Announcements in the Quick View Task Flow"
- Section 43.7.2.2, "Managing Announcements in the Quick View Task Flow"

43.7.2.1 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 43–6).
The announcement details display in the Announcement dialog (Figure 43–7). Similar to the announcement content displayed in the Announcements task flow, this dialog displays content with all the formatting that was applied to it.

2. Click Close to exit the dialog.

43.7.2.2 Managing Announcements in the Quick View Task Flow

You can manage announcements in the Announcements - Quick View task flow with the Announcement Manager. The Announcement Manager provides the functionality 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 43–8).

The Announcement Manager allows users to create new announcements, edit existing announcements, delete (if users have the permission to do so) announcements, send
Working with the Announcements Task Flow

mail to portal members (showing the content and a link to the announcement), and link announcements with other assets.

**Figure 43–8  Open Announcement Manager Icon**

<table>
<thead>
<tr>
<th>Announcements - Quick View</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales conference scheduled</td>
</tr>
<tr>
<td>Release celebration scheduled for June 19</td>
</tr>
<tr>
<td>Window washing on Monday, June 24</td>
</tr>
<tr>
<td>Thursday, July 4th, is a U.S. Holiday</td>
</tr>
</tbody>
</table>
Adding a Calendar and Events to a Portal

This chapter describes calendars and events in WebCenter Portal. It also describes how you can add the Events task flow to a page in your portal or Home portal to view and manage calendar events. If you want participants to view events on the Events page (or console), you also need to provide navigation to the Events page in your portal. Events also enables you to view your personal Microsoft Exchange calendar within a page in the Home portal. In addition, you can overlay portal calendars on top of the personal calendar, so that you can view your entire schedule from a single place.

This chapter includes the following topics:

- Section 44.1, "Prerequisites for Events"
- Section 44.2, "About Calendars and Events"
- Section 44.3, "Creating and Managing Portal Event Categories"
- Section 44.4, "Showing Events on a Page in the Home Portal"
- Section 44.5, "Showing Events on the Events Page in a Portal"
- Section 44.6, "Displaying Multiple Calendars in an Events Task Flow"
- Section 44.7, "Adding an Events Page to a Portal"
- Section 44.8, "Adding an Events Task Flow to a Page"
- Section 44.9, "Setting Events Task Flow Properties"
Prerequisites for Events

Permissions: To perform the tasks in this chapter, you need the portal-level permission Manage Security and Configuration or Manage Configuration. A portal moderator has this permission by default.

To add the Events task flows to a page and to enable calendar overlays, you need the portal-level permission Basic Services: Edit Page Access, Structure, and Content (simple permissions) or Create, Edit, and Delete Pages (advanced permissions).

Permissions to work with events are granted by default to the portal Participant role. To manage access to events, you need one or more advanced permissions:

- Create, Edit, and Delete Events
- Create Events
- Edit Events
- Delete Events
- View Events

For more information about portal-level permissions, see Section 29.1, “About Roles and Permissions for a Portal.”

44.1 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 the “Managing Calendar Events” chapter in Administering Oracle WebCenter Portal.

See Also: “Troubleshooting Issues with Events” section in Administering Oracle WebCenter Portal.

To make events available in a portal, the portal moderator 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 Section 39.2, “Enabling and Disabling Tools and Services Available to a Portal.”

- Optionally, configure the event categories, as described in Section 44.3, “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 Section A.7, "Pretty URLs for Pages in a Specified Portal").
  - Add a page link to the Events page in the portal navigation (see Section 44.7, "Adding an Events Page to a Portal").
Add the Events task flow to a page in the portal (see Section 44.8, "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 the "Working with Calendars and Events" chapter in *Using Oracle WebCenter Portal*.

### 44.2 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:

- Section 39.2, "Enabling and Disabling Tools and Services Available to a Portal"
- Section 44.7, "Adding an Events Page to a Portal"
- Section 44.8, "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 in Events task flows that are located on pages in the Home portal, to the user logged in to the exchange calendar. See Section 44.4, "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 moderator) or in any Events task flow that is located on a page in the portal. For more information about portal-level permissions, see Section 29.1, "About Roles and Permissions for a Portal."

  **See Also:** "Where to View Events" section in *Using Oracle WebCenter Portal*.

### 44.3 Creating and Managing Portal Event Categories

---

**Note:** Enable Events, as described in Section 39.2, "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 Section 7.8.1, "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:** Appendix A, "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 44–1).

   **Figure 44–1  Working with Portal Event Categories**

   ![Diagram of Tools and Services page with Events selected]

3. Click OK to dismiss the message about giving portal users permissions.

4. To create a new portal event category, click Create (Figure 44–2).

   **Figure 44–2  Creating an Event Category**

   ![Diagram of Create Category dialog]

5. In the Create Category dialog, enter a Category Name, and select a color for the event category, then click Yes (Figure 44–3).
Figure 44–3  Create Category Dialog

For information about assigning a category to an event, see the "Working with Calendars and Events" chapter (specifically the "Scheduling Events" section) in Using 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 the "Filtering Events by Category" section in Using Oracle WebCenter Portal.

6. To edit or delete a portal event category, select the category, then click either Edit or Delete (Figure 44–4).

Figure 44–4  Editing or Deleting a Portal Event Category

For more information see the "Revising Scheduled Events" and "Cancelling Scheduled Events" sections in Using Oracle WebCenter Portal.

44.4 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 2003 or 2007 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, from where 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 Section 44.6, "Displaying Multiple Calendars in an Events Task Flow."
To show events on a page in the Home portal:

1. Add a personal page to the Home portal.
   See the "Creating and Managing Personal Pages" section in Using Oracle WebCenter Portal.

2. Edit the page and add the Events task flow.
   See the "Editing a Personal Page" section in Using Oracle WebCenter Portal and Section 44.8, "Adding an Events Task Flow to a Page."

3. Click Login to Personal Calendar (Figure 44–5).
   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 44–5 Events Task Flow in Home Portal Before Logging In (Without Calendar Overlaying)

   ![Events Task Flow in Home Portal Before Logging In](image)

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 Section 44.6, "Displaying Multiple Calendars in an Events Task Flow"), click Personal Events (Figure 44–6) and then click Continue (Figure 44–7).
4. In the External Application Login dialog that opens, 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 the "Providing Login Information for External Applications" section in *Using Oracle WebCenter Portal*.

Your personal calendar is displayed (Figure 44–8).
If you decide not to show the Events page later, see Section 13.9, "Showing or Hiding a Page in the Portal Navigation."

If you want participants to be able to access their personal calendars, you must give them access to the page. See Section 13.15, "Setting Page Security."

### 44.5 Showing Events on the Events Page in a Portal

Section 44.4, "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 Section 44.7, "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 the "Showing or Hiding Pages in Your View of the Home Portal" section in Using Oracle WebCenter Portal.

---

Figure 44–9 shows the Events task flow on the Events page (or console).
44.6 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 Section 44.3, "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 Section 44.8, "Adding an Events Task Flow to a Page."

This section includes the following subsections:
44.6.1 Enabling Calendar Overlaying

To enable calendar overlaying on a page:

1. In the Home portal or in your portal, open the page that contains the Events task flow in edit mode (see Section 12.4.3, "Opening a Page in the Page Editor (Composer)").
2. Click the Edit icon (wrench) for the Events task flow.
3. In the Component Properties: Events dialog, click the Parameters tab (Figure 44–10).
4. From the Calendar Overlay Style drop-down list, select:
   - None if you do not want to use calendar overlays.
   - Mini to use a compact view of the calendar overlay. This takes up less space on the page, but it might not be immediately obvious how to work with the overlays. Use this option if space is very limited on the page, or when your users have become familiar with calendar overlays and how to use them. Mini style is available only with Day and List view, not Week or Month.
   - Full to use a detailed calendar overlay. Use this option if space is not an issue on the page and to provide a richer user interface.

5. Click OK to save your changes and exit the Component Properties dialog.
6. Click Save at the top left of the Composer 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 44–11** shows the Events task flow on a page in the Home portal, with full calendar overlay.

![Figure 44–11  Events Task Flow with Full Calendar Overlay Area](image)

If you selected the **Mini** option for the **Calendar Overlay Style**, the calendar overlay area is much smaller, displaying the day view only (**Figure 44–12**).
44.6.2 Displaying Additional Calendars

When the calendar overlaying feature is enabled (see Section 44.6.1, "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 44–13).

   **Figure 44–13 Add Calendar Icon**

   ![Add Calendar Icon](image)
3. In the Add Calendar dialog (Figure 44–14), select the portal that has the calendar that you want to display in the task flow.
   You can select multiple portals.

   **Figure 44–14 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 44–15).
44.7 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 Section 13.2, "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 will also automatically expose this page.

44.8 Adding an Events Task Flow to a Page

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.

For the steps to add an events task flow to a page, see Section 14.2, "Adding a Component to a Page."
Tip: The presence or location of Events and Events - Mini View task flows depends on how the resource catalog is configured. For example, in the Default Portal Catalog, the Events and Events - Mini View task flows are included under the Social and Communication folder.

The selected events task flow is displayed on the page. Figure 44–16 shows the Events task flow on a page in the Home portal.

Figure 44–16  Events Task Flow with Full Calendar Overlay Area

Users with Edit privileges can access the task flow’s Component Properties dialog in Composer (see Section 44.9, "Setting Events Task Flow Properties").

44.9 Setting Events Task Flow Properties

The Events task flows have associated properties, which users with sufficient privileges can access through the Component Properties dialog in Composer (Figure 44–17).
For information about accessing the Component Properties dialog, see Section 14.3, "Modifying Component Properties."

The following sections provide information about properties of the Events task flows and describe the properties on the Parameters tab:

- Section 44.9.1, "About the Events Task Flow Properties"
- Section 44.9.2, "Events Task Flow Parameters"
- Section 44.9.3, "Events - Mini View Task Flow Parameters"

### 44.9.1 About the Events Task Flow Properties

The properties on the **Parameters** tab of the Component Properties dialog control the default task flow content. For descriptions of the parameters on this tab, see Section 44.9.3, "Events - Mini View Task Flow Parameters." For some task flows, parameters on this tab facilitate the wiring of the task flow to page parameters and page definition variables. For more information, see Chapter 19, "Wiring Pages, Task Flows, Portlets, and ADF Components."

Changes to the properties on the **Display Options**, **Style**, and **Content Style** tabs affect the appearance and behavior of the task flow for all users. These properties are common to all task flows. For more information, see Section 14.3, "Modifying Component Properties."

The contents of the **Events** tab depend on the events supported by the task flow. For more information, see Section 14.3.7, "Working with Component Contextual Events."

The **Child Components** tab displays all of the components contained within the current component. It provides controls for rearranging, showing, and hiding child components. Not all components contain children. So this tab may be omitted. For more information, see Section 14.3.5, "Working with Child Components."

All properties on the **Parameters** and **Display Options** tabs provide access to an Expression Language (EL) editor, which you can use to select or specify a variable
value instead of a constant value. Click the icon next to a property, then select **Expression Builder** to open the editor.

---

**Note:** When you enter EL on the generic **Display Options** tab in the Component Properties 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 14–1, "Display Options Properties".

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

If you need EL assistance, an application developer can provide an EL expression; see the "Expression Language Expressions" appendix in *Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper*.

### 44.9.2 Events Task Flow Parameters

Table 44–1 describes the parameters that are unique to the Events task flow.

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Calendar Overlay Style</td>
<td>Whether calendar overlay is enabled. Valid values are:</td>
</tr>
<tr>
<td></td>
<td>■ Empty (default): No calendar overlay</td>
</tr>
<tr>
<td></td>
<td>■ None: No calendar overlay</td>
</tr>
<tr>
<td></td>
<td>■ Mini: Calendar overlay is enabled in Mini mode, which takes up less screen space</td>
</tr>
<tr>
<td></td>
<td>■ Full: Calendar overlay is enabled in Full mode</td>
</tr>
<tr>
<td>Calendar Style Class</td>
<td>The name of the custom style class you want to apply to the calendar component.</td>
</tr>
<tr>
<td>Customization ID</td>
<td>A unique identifier for event view customization.</td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
<tr>
<td>Default Current Date</td>
<td>The default current date on the calendar. Valid values are:</td>
</tr>
<tr>
<td></td>
<td>■ Empty (default): The current date (that is, today's date)</td>
</tr>
<tr>
<td></td>
<td>■ Any date using the format mm/dd/yyyy</td>
</tr>
<tr>
<td>Disable Personalize and Customize</td>
<td>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.</td>
</tr>
</tbody>
</table>
Table 44–1 (Cont.) Events Task Flow Parameters

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group Space</td>
<td>The name of the portal that is the source of listed events.</td>
</tr>
<tr>
<td></td>
<td>Valid values are:</td>
</tr>
<tr>
<td></td>
<td>■ Empty: Task flow displays events for the current portal (that is,</td>
</tr>
<tr>
<td></td>
<td>the portal in which it is placed)</td>
</tr>
<tr>
<td></td>
<td>■ Any portal display name: Task flow displays events for the named portal</td>
</tr>
<tr>
<td></td>
<td>The portal display name is available on the General page in the</td>
</tr>
<tr>
<td></td>
<td>portal administration settings.</td>
</tr>
<tr>
<td>Maximum Calendars</td>
<td>The maximum number of calendars that a user can add to the task flow.</td>
</tr>
<tr>
<td></td>
<td>When the maximum is reached, the Add Calendar icon no longer appears in the</td>
</tr>
<tr>
<td></td>
<td>task flow.</td>
</tr>
<tr>
<td></td>
<td>Default value: 20</td>
</tr>
<tr>
<td>Maximum Enabled Calendars</td>
<td>The maximum number of calendars that a user can display simultaneously.</td>
</tr>
<tr>
<td></td>
<td>This value must not be greater than the value specified for Maximum</td>
</tr>
<tr>
<td></td>
<td>Calendars.</td>
</tr>
<tr>
<td></td>
<td>Default value: The same value as that specified for Maximum Calendars</td>
</tr>
</tbody>
</table>

44.9.3 Events - Mini View Task Flow Parameters

Table 44–2 describes the parameters that are unique to the Events - Mini View task flow.

Table 44–2 Events - Mini View Task Flow Parameters

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Calendar Toolbox Layout</td>
<td>Custom calendar toolbox layout. The value is passed to the ADF calendar</td>
</tr>
<tr>
<td></td>
<td>component as a toolboxLayout attribute.</td>
</tr>
<tr>
<td>Customization ID</td>
<td>A unique identifier for event view customization.</td>
</tr>
<tr>
<td></td>
<td>Customization ID assists with maintaining the association of this task</td>
</tr>
<tr>
<td></td>
<td>flow instance with its customization and personalization settings. This</td>
</tr>
<tr>
<td></td>
<td>value is set automatically. Do not edit this value.</td>
</tr>
<tr>
<td>Event Text Length</td>
<td>The maximum number of characters of the event title to display in Mini view.</td>
</tr>
<tr>
<td></td>
<td>Leave blank or enter 0 if you do not want the event title to be</td>
</tr>
<tr>
<td></td>
<td>truncated.</td>
</tr>
<tr>
<td></td>
<td>Default value: 18</td>
</tr>
<tr>
<td>List Events in Number of Upcoming Days</td>
<td>The number of days for which to list upcoming events.</td>
</tr>
<tr>
<td></td>
<td>Default value: 30</td>
</tr>
<tr>
<td>Number of Events Per Page</td>
<td>The number of events to display at one time.</td>
</tr>
<tr>
<td></td>
<td>Default value: 5</td>
</tr>
<tr>
<td>Using ADF Calendar Component</td>
<td>A check box to select determine whether to use the ADF Calendar</td>
</tr>
<tr>
<td></td>
<td>UI Component or a simple list with page flow.</td>
</tr>
</tbody>
</table>
This chapter describes how to add Connections task flows to a portal. Connections task flows enable users to build a social network of work friends and associates, which, in turn, fosters a collaborative work environment.

This chapter includes the following topics:

- Section 45.1, "About Connections"
- Section 45.2, "Adding a Connections Task Flow to a Page"
- Section 45.3, "Setting Connections Task Flow Properties"
- Section 45.4, "Working with Connections Task Flows"

Permissions: To perform the tasks in this chapter, you need the portal-level permission Basic Services: Edit Page Access and Structure (standard permissions) or Pages: Edit Pages (advanced permissions). A portal moderator has this permission by default.

For more information about permissions, see Section 29.1, "About Roles and Permissions for a Portal."

45.1 About Connections

Connections provides a means of collecting your business friends and contacts into a social network. It furnishes tools for managing your own connections and viewing the connections of others. Using People Connections Preferences, you can grant differing levels of access to those who are and are not your connections. For example, you can limit view privileges on your Profile to just your connections or enable your connections to view certain sections of your Profile, while hiding those sections from users who are not your connections.

See Also: The "Setting Connections Preferences" section in Using Oracle WebCenter Portal

When you connect with other users, you give them access to your People Connections views, and gain access to theirs.
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 the "Configuring Connections" section 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 45–1)*

*Figure 45–1  Connections Task Flow*

- **Connections - Card** for photos, status messages, and instant contact options to your connections *(Figure 45–2)*

---

**Note:** People Connections encompasses Connections, Activity Stream, Message Board, Feedback, and Profile. For more information, see:

- Chapter 41, "Adding Activities to a Portal"
- Chapter 49, "Adding Messages and Feedback to a Portal"
- Chapter 53, "Adding Profiles to a Portal"
Connections - Card Task Flow

Connections - Detailed View for photos and quick access to your connections and features for inviting new connections, managing existing connections, and organizing your connections into lists (Figure 45–3)

Connections - Detailed View Task Flow

Connections - Quick View for photos and quick access to your connections (Figure 45–4)

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: Section 45.3, "Setting Connections Task Flow Properties"

For information about using Connections features, see the "Managing Your Contacts" section in Using Oracle WebCenter Portal.

45.2 Adding a Connections Task Flow to a Page

For the steps to add a Connections task flow to a page, see Section 14.2, "Adding a Component to a Page."

Tip: The presence or location of the Connections task flows depends on how the resource catalog is configured. For example, in the Default Portal Catalog, the Connections task flows are included under the Social and Communication folder.

45.3 Setting Connections Task Flow Properties

Connections task flows have associated properties, which users with sufficient privileges can access through the Component Properties dialog in Composer (Figure 45–5).

Figure 45–5 Connections Task Flow Component Properties

See Also: Section 14.3.2, "Setting Properties on a Component"
The following sections provide information about properties associated with Connections task flows and describe the properties available on the Parameters tab:

- Section 45.3.1, "About Connections Task Flow Properties"
- Section 45.3.2, "Connections Task Flow Parameters"
- Section 45.3.3, "Using Properties to Configure a Connections Task Flow Instance"

### 45.3.1 About Connections Task Flow Properties

When you set property values on a Connections task flow, you are affecting only the task flow instance on which the value is set. Other instances of the same task flow are not affected by such changes.

The properties on the Parameters tab of the Component Properties dialog control the default task flow content. For descriptions of the parameters on this tab, see Section 45.3.2, "Connections Task Flow Parameters." For some task flows, parameters on this tab facilitate the wiring of the task flow to page parameters and page definition variables. For more information, see Chapter 19, "Wiring Pages, Task Flows, Portlets, and ADF Components."

Changes to the properties on the Display Options, Style, and Content Style tabs affect the appearance and behavior of the task flow. These properties are common to all task flows. For more information, see Section 14.3, "Modifying Component Properties."

The content of the Events tab depends on the events supported by the task flow. For more information, see Section 14.3.7, "Working with Component Contextual Events."

All properties on the Parameters and Display Options tabs provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the icon next to a property, then select Expression Builder to open the editor. For more information about using the editor and for descriptions of common EL expressions, see the “Expression Language Expressions” appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

---

**Note:** When you enter EL on the generic Display Options tab in the Component Properties 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 14–1, “Display Options Properties”.

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

---

### 45.3.2 Connections Task Flow Parameters

Table 45–1 describes the parameters that are unique to Connections task flows.
Table 45–1 Connections Task Flow Parameters

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allow Remove</td>
<td>A Boolean value representing whether a control is available on the task flow for removing a connection</td>
</tr>
<tr>
<td></td>
<td>Enter either true or false.</td>
</tr>
<tr>
<td></td>
<td>This value is honored only when the task flow instance is rendered in list format. For more information, see Profile Format.</td>
</tr>
<tr>
<td></td>
<td>This parameter is associated with the Connections - Card task flow.</td>
</tr>
<tr>
<td>Connection List Name</td>
<td>The name of a grouped list of connections</td>
</tr>
<tr>
<td></td>
<td>Use this parameter to limit the display of connections to those on the specified Connections list.</td>
</tr>
<tr>
<td></td>
<td>Enter the name of a Connections list.</td>
</tr>
<tr>
<td></td>
<td>This parameter is associated with the Connections - Card task flow.</td>
</tr>
<tr>
<td>Current View</td>
<td>The view to display by default</td>
</tr>
<tr>
<td></td>
<td>Valid values include:</td>
</tr>
<tr>
<td></td>
<td>■ connections—(the default value) a list of connections</td>
</tr>
<tr>
<td></td>
<td>■ receivedInvitations—a list of connections invitations you received</td>
</tr>
<tr>
<td></td>
<td>■ sentInvitations—a list of connections invitations you sent</td>
</tr>
<tr>
<td></td>
<td>■ people—a search field for finding people with whom to connect</td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td>This parameter is associated with the Connections task flow.</td>
</tr>
<tr>
<td>Filter Pattern</td>
<td>A value to act as a filter against task flow content</td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td>This parameter is associated with the Connections - Card task flow.</td>
</tr>
<tr>
<td>Hide Footer</td>
<td>A Boolean value representing whether to hide the task flow footer</td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td>■ Select the check box (#(true)) to hide the task flow footer.</td>
</tr>
<tr>
<td></td>
<td>■ Deselect the check box (#(false)) to show the task flow footer.</td>
</tr>
<tr>
<td></td>
<td>This parameter is associated with the following task flows:</td>
</tr>
<tr>
<td></td>
<td>■ Connections – Card</td>
</tr>
<tr>
<td></td>
<td>■ Connections – Quick View</td>
</tr>
</tbody>
</table>
### Table 45–1  (Cont.) Connections Task Flow Parameters

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Hide Header</strong></td>
<td>A Boolean value representing whether to hide the task flow header</td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td>- Select the check box (#{true}) to hide the task flow header.</td>
</tr>
<tr>
<td></td>
<td>- Deselect the check box (#{false}) to show the task flow header. (default)</td>
</tr>
<tr>
<td></td>
<td>This parameter is associated with the Connections - Quick View task flow.</td>
</tr>
<tr>
<td><strong>Hide Name</strong></td>
<td>Determines whether the connection’s name appears under the connection’s picture when the Profile Format is set to iconic.</td>
</tr>
<tr>
<td></td>
<td>- Select the check box (#{true}) to hide connections’ names. The connection’s photo is a link to his or her profile.</td>
</tr>
<tr>
<td></td>
<td>- 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)</td>
</tr>
<tr>
<td></td>
<td>This parameter is associated with the Connections - Card task flow.</td>
</tr>
<tr>
<td><strong>Launch Style</strong></td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td>Select one of the following formats:</td>
</tr>
<tr>
<td></td>
<td>- Snapshot—Launches a profile popup when a user clicks a connection.</td>
</tr>
<tr>
<td></td>
<td>- Profile—Launches the profile page when a user clicks a connection.</td>
</tr>
<tr>
<td></td>
<td>This parameter is considered only if Profile Launched on Selection is selected.</td>
</tr>
<tr>
<td></td>
<td>This parameter is associated with the Connections - Card task flow.</td>
</tr>
<tr>
<td><strong>Number of Columns</strong></td>
<td>The number of columns to show in the task flow</td>
</tr>
<tr>
<td></td>
<td>For example, with six connections to show, a value of 2 means those connections are shown in two columns with three rows.</td>
</tr>
<tr>
<td></td>
<td>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.)</td>
</tr>
<tr>
<td></td>
<td>This parameter is associated with the following task flows:</td>
</tr>
<tr>
<td></td>
<td>- Connections - Card</td>
</tr>
<tr>
<td></td>
<td>- Connections - Quick View</td>
</tr>
</tbody>
</table>
Table 45–1  (Cont.) Connections Task Flow Parameters

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Connections per page</td>
<td>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</td>
</tr>
<tr>
<td>Number of Rows</td>
<td>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</td>
</tr>
<tr>
<td>Number of Rows (list layout)</td>
<td>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.</td>
</tr>
<tr>
<td>Profile Format</td>
<td>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.</td>
</tr>
</tbody>
</table>
45.3.3 Using Properties to Configure a Connections Task Flow Instance

This section provides examples of how you use property values to affect the behavior of a given task flow instance. Because you make these changes in the page editor (Composer), they affect all users' views of the affected task flow instance.

This section includes the following subsections:

- Section 45.3.3.1, "Adding a Remove Button to Connections - Card"
- Section 45.3.3.2, "Restricting Connections Displayed to Those on a Named List"
- Section 45.3.3.3, "Specifying an Initial View for a Connections Task Flow Instance"
45.3.3.1 Adding a Remove Button to Connections - Card

By default, the Connections - Card task flow does not provide a control for permanently removing a connection. You can use the Allow Remove property on a Connections - Card 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. Edit the properties of a Connections - Card task flow instance.

   **See Also:** For information about editing task flow properties, see Section 14.3, "Modifying Component Properties."

2. In the Component Properties dialog, bring the Parameters tab forward.

3. Set Profile Format to list.

4. Provide a value for Allow Remove:

   - Select the check box (#(true)) to enable the display of a Remove button next to a listed connection (Figure 45–6).

   - Deselect the check box (#(false)) to disable this feature.

5. Click OK.

**Figure 45–6  Remove Icon on a Connections - Card Task Flow**

<table>
<thead>
<tr>
<th>Chad Olsen</th>
<th>Ella Kennedy</th>
<th>Robert Davis</th>
<th>Charlotte Ph..</th>
<th>Noah Garcia</th>
</tr>
</thead>
<tbody>
<tr>
<td>VP of Sales</td>
<td>VP of Sales</td>
<td>Outside Sales Rep.</td>
<td>Territory Manager</td>
<td>Territory Manager</td>
</tr>
<tr>
<td>Sales</td>
<td>Sales</td>
<td>Sales</td>
<td>Sales</td>
<td>Sales</td>
</tr>
<tr>
<td>no recent updates</td>
<td>no recent updates</td>
<td>no recent updates</td>
<td>no recent updates</td>
<td>no recent updates</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
45.3.3.2 Restricting Connections Displayed to Those on a Named List
In an instance of the Connections - Card task flow, you can use the Connection List Name property to restrict the display of connections to only those users included on a named Connections list.

See Also: For information about Connections lists, see the "Creating and Managing Groups of Contacts" section in Using Oracle WebCenter Portal.

To restrict a Connections - Card task flow to a particular Connections list:
1. Edit the properties of a Connections - Card task flow instance.

See Also: For information about editing task flow properties, see Section 14.3, "Modifying Component Properties."

2. In the Component Properties dialog, bring the Parameters tab forward.

3. In the Connection List Name field, enter the name of the Connections list to use to limit the display of connections.

4. Click OK.

45.3.3.3 Specifying an Initial View for a Connections Task Flow Instance
Use the Current View property to specify the initial view of a Connections task flow instance. For most views, users can change the default you specify here. The exception is the people view, in which there are no controls for switching to a different view.

To specify an initial view for a Connections task flow instance:
1. Edit the properties of a Connections task flow instance.

See Also: For information about editing task flow properties, see Section 14.3, "Modifying Component Properties."

2. In the Component Properties dialog, bring the Parameters tab forward.

3. For Current View, select one of the following:
   ■ connections—(the default value) a list of connections
   ■ receivedInvitations—a list of connections invitations you received
   ■ sentInvitations—a list of connections invitations you sent
   ■ people—a search field for finding people with whom to connect

4. Click OK.

45.3.3.4 Limiting the Number of Displayed Connections
The Connections - Card, Connections - Detailed View, and Connections - Quick View task flows provide the property Number of Connections per page for limiting the number of connections to show at a time. If a user's number of connections exceeds the specified value, a link is shown at the bottom of the task flow to enable the user to navigate to a full view of the Profile page's Connections subpage.

To limit the number of displayed connections in a Connections - Card, Connections - Detailed View, or Connections - Quick View task flow instance:
1. Edit the properties of a Connections - Card, Connections - Detailed View, or Connections - Quick View task flow instance.

   **See Also:** For information about editing task flow properties, see Section 14.3, "Modifying Component Properties."

2. In the Component Properties dialog, bring the **Parameters** tab forward.

3. Provide a value for **Number of Connections per page**.

4. Click **OK**.

### 45.3.3.5 Specifying Numbers of Rows and Columns

The Connections, Connections - Card, and Connections - Quick View task flows provide properties for controlling the number of columns and rows to show at a time. When column and row values are both specified, and a user's number of connections exceeds the specified values, **Previous** and **Next** links are shown, enabling the user to page through his connections.

To specify the number of rows and columns of connections to show:

1. Edit the properties of a Connections, Connections - Card, or Connections - Quick View task flow instance.

   **See Also:** For information about editing task flow properties, see Section 14.3, "Modifying Component Properties."

2. In the Component Properties dialog, bring the **Parameters** tab forward.

3. Enter a numeric value to control the number of rows to show:
   - For Connections, enter a number for **Number of Rows (list layout)**.
   - For Connections - Card and Connections - Quick View, enter a number for **Number of Rows**.

4. For Connections - Card and Connections - Quick View, enter a numeric value in the **Number of Columns** field to control the number of columns to show.

5. Click **OK**.

### 45.3.3.6 Applying a Filter to a Connections - Card Task Flow Instance

The **Filter Pattern** property enables you to apply a filtering term that limits the display of connections in a Connections - Card task flow instance to only those who meet the filtering criteria. For example, to show only those connections with a user name that includes the term **pat** (including **patrick** or **sripathy**), enter **pat** for the **Filter Pattern** property.

The filter is applied to all of the information in a given card, so you can filter against things like the user's job title or name. For example, entering the term **manager**, ensures that only those connections whose job title includes **manager** are displayed in the task flow instance.

To apply a filter to a Connections - Card task flow instance:

1. Edit the properties of a Connections - Card task flow instance.

   **See Also:** For information about editing task flow properties, see Section 14.3, "Modifying Component Properties."
2. In the Component Properties dialog, bring the **Parameters** tab forward.

3. Enter a filtering term for **Filter Pattern**.

   **Tip:** For example, enter a job title, a user name, or partial values, such as man.

4. Click OK.

### 45.3.3.7 Selecting a Display Format for a Connections - Card Task Flow Instance

The **Profile Format** property provides options for controlling the arrangement of connections within a Connections - Card task flow instance. Both the placement of information and the amount of information shown are affected by your selection.

To select a display format for a Connections - Card task flow instance:

1. Edit the properties of a Connections - Card task flow instance.

   **See Also:** For information about editing task flow properties, see Section 14.3, "Modifying Component Properties."

2. In the Component Properties dialog, bring the **Parameters** tab forward.

3. 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 45–7).

   ![Figure 45–7 Connections - Card in Virtual Business Card Format](image)

   - **Iconic**—Renders the connection’s personal profile photo and shows the user name below the photo (Figure 45–8).
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 45–9).

Tiled—Renders the connection’s personal Profile photo and shows the user name and job title beside the photo (Figure 45–10).
4. Click OK.

45.3.3.8 Invoking a Profile Popup from a Connections - Card Task Flow Instance

The Profile Launched on Selection property provides a means of launching a Profile popup when users click a connection name in a Connections - Card task flow instance (Figure 45–11).

Figure 45–11 Invoking a Profile Popup from the Connections - Card Task Flow
When this option is not selected, clicking a connection name in the task flow simply selects the connection.

To enable the launch of a Profile popup from a Connections - Card task flow instance:

1. Edit the properties of a Connections - Card task flow instance.
   
   **See Also:** For information about editing task flow properties, see Section 14.3, "Modifying Component Properties."

2. In the Component Properties dialog, bring the **Parameters** tab forward.

3. Select an option for Profile Launched on Selection:

   - Select the check box (**true**) to enable a Profile popup to launch when a user clicks a connection.

   - Deselect the check box (**false**) to suppress this option.

4. Click **OK**.

### 45.4 Working with Connections Task Flows

For information about how users work with Connections task flows, see the "Managing Your Contacts" chapter in *Using Oracle WebCenter Portal.*
Adding Discussion Forums to a Portal

This chapter describes discussions feature and how to set up discussions in a portal for participants. Discussions provide a means of creating and participating in text-based discussions with other members of a portal. Use discussions to create forums, post questions, and search for answers. Discussion forums additionally provide the means to preserve and revisit discussions.

This chapter includes the following topics:

- Section 46.1, "Prerequisites for Discussions"
- Section 46.2, "About Discussions"
- Section 46.3, "Modifying Discussion Forum Settings for a Portal"
- Section 46.4, "Publishing Portal Mail in a Discussion Forum"
- Section 46.5, "Adding a Discussions Page to a Portal"
- Section 46.6, "Adding a Discussions Task Flow to a Page"
- Section 46.7, "Setting Discussions Task Flow Properties"
- Section 46.8, "Working with Discussions Task Flows"

**Permissions:** To perform the tasks in this chapter, you need the portal-level permission Manage Security and Configuration or Manage Configuration. A portal moderator has this permission by default.

Additionally, you need the following permissions:

- Create, Edit, and Delete Discussions or Create and Edit Discussions

To add the Discussions task flows to a page, you need the portal-level permission Basic Services: Edit Page Access, Structure, and Content (simple permissions) or Create, Edit, and Delete Pages (advanced permissions).

For more information about portal-level permissions, see Section 29.1, "About Roles and Permissions for a Portal."

### 46.1 Prerequisites for Discussions

For discussions to work, the system administrator needs to perform the following tasks for WebCenter Portal:
About Discussions

- 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’s Discussion Server. For more information, see the "Managing Announcements and Discussions" chapter in *Administering Oracle WebCenter Portal*.

- Configure Discussions forum options for WebCenter Portal, as described in the "Configuring Discussion Forum Options for WebCenter Portal” section in *Administering Oracle WebCenter Portal*.

---

**See Also:** "Troubleshooting Issues with Announcements and Discussions" section in *Administering Oracle WebCenter Portal*.

---

To make discussions available in a portal, the portal moderator 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 Section 39.2, "Enabling and Disabling Tools and Services Available to a Portal.”

- Optionally, modify Discussion Forum settings, as described in Section 46.3, "Modifying Discussion Forum Settings for a Portal."

- Optionally, configure the portal mail settings to publish mail in portal Discussion Forums, as described in Section 46.4, "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 Section A.7, "Pretty URLs for Pages in a Specified Portal").
  - Add a page link to the Discussions page in the portal navigation (see Section 46.5, "Adding a Discussions Page to a Portal").
  - Add a discussions task flow to a page in the portal (see Section 46.6, "Adding a Discussions Task Flow to a Page").

---

**Note:** For information about the discussions feature and how to use discussions, see Section 46.8, "Working with Discussions Task Flows."

---

### 46.2 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 Discussion Server) manages content in a hierarchy. At the top of the hierarchy are categories, below that are forums, and then topics. Where categories are exposed in your 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 moderators can allocate multiple forums to a portal if required, as described in Section 46.3, "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 Section 4.4, "Granting Users Access to a Portal").

To open a discussion to all users, you must create a publicly-accessible portal (for more information, see Section 4.5, "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 scope (for more information, see Section 46.7, "Setting Discussions Task Flow Properties").

---

**Note:** All instances of the Discussions task flow in a portal run 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 46–1).

Only portal moderators can create, edit, and delete discussion forums, as described in Section 46.8.1, "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 the "Working with Discussions" chapter in Using Oracle WebCenter Portal.

---

**Figure 46–1  Discussion Forums Task Flow**

The Discussion Forums task flow is exposed by default on the Discussions page of a portal. You cannot add this task flow to the Home portal.
About Discussions

- **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 46–2).

*Figure 46–2  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 46–3).

For example, when Recent Topics is selected on the menu, the Display Settings dialog offers the options **Author**, **Date**, and **Replies** (Figure 46–3). When the task flow displays Watched Forums, the Display Settings dialog offers the options **Date** and **Topics**.

For more information, see the “Showing or Hiding Information in Forums View” section in Using Oracle WebCenter Portal.

*Figure 46–3  Display Settings Dialog*

The available display settings vary according to the option currently selected on the Forums task flow’s **Display Options** menu (Figure 46–4).

*Figure 46–4  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 Portal Catalog.

- **Popular Topics** (Figure 46–5) provides a look at the most frequently viewed discussion topics in all the discussion forums in a given portal.
Figure 46–5  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 46–6).

Figure 46–6  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 portal. It is available under the Social and Communication folder in the Default Portal Catalog.

For more information, see the "Showing or Hiding Information in Popular Topics" section in Using Oracle WebCenter Portal.

Recent Topics (Figure 46–7) provides a look at the most recently accessed discussion topics in all the discussion forums in a given portal.

Figure 46–7  Recent Topics Task Flow

Access to portal discussion topics is restricted to 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 46–8).
Figure 46–8  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 Portal Catalog.

For more information, see the "Showing or Hiding Information in Recent Topics” section in Using Oracle WebCenter Portal.

■ Watched Forums (Figure 46–9) provides a means of viewing all discussion forums you have selected to watch from a particular portal or from all portals.

Figure 46–9  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 46–10).

Figure 46–10  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 Portal Catalog.

For more information, see the "Showing or Hiding Information in Watched Forums” section in Using Oracle WebCenter Portal.
- **Watched Topics** (Figure 46–11) provides a cohesive view of all the topics you have selected to watch from a particular portal or from all portals.

**Figure 46–11  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 46–12).

**Figure 46–12  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 Portal Catalog.

For more information, see the "Showing or Hiding Information in Watched Topics" section in **Using 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 moderator must select **Monitor Incoming Mail** in the portal settings for discussions (see **Section 46.4, “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.

### 46.3 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 the "Configuring Discussion Forum Options for WebCenter Portal" section 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 **Section 39.2, "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 the "Specifying Where Discussions and Announcements are Stored on the Discussions Server" section 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 the "Managing Announcements and Discussions" chapter in *Administering Oracle WebCenter Portal*.

To modify the discussion forum settings for a portal:

1. On the Tools and Services page (see Section 7.8.1, "Accessing Tools and Services Administration for a Portal"), select **Discussions** (Figure 46–13).

![Figure 46–13 Portal Discussion Forum Settings](image)

2. (Optional) To launch the Jive Forums Administration Console, the Web-based tool for configuring and managing discussion forums, click **Administer Forums** (Figure 46–13).

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 Section 46.7.2, "Discussions Task Flow Parameters."

4. Click **Save**.

   The page refreshes to show a category, under which the multiple forums are stored (Figure 46–14).
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 46–14) to change the storage location.

6. Click Save.

46.4 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 WebCenter Portal. The Mail service is not configured out-of-the-box. Refer to the "Managing Mail" chapter in *Administering Oracle WebCenter Portal*.

---

To publish portal mail in a discussion forum:

1. On the Tools and Services page (see Section 7.8.1, "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 46–15).

   To disable this feature so that mail is not published for any portal, deselect this check box.
3. If required, update the portal **Mail Account**.

   This is the default distribution list used to mail all portal members. For details, see Section 48.2, "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, and 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** to display list of available forums in the portal (Figure 46–16).
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.

46.5 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 Section 13.2, "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 will also automatically expose this page.

46.6 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 Section 14.2, "Adding a Component to a Page."
The Discussions task flows are included in the Default Portal Catalog under the **Social and Communication** folder (Forums, Watched Forums, and Watched Topics) and the **Alerts and Updates** folder (Popular Topics and Watched Topics).

Figure 46–17 shows the Popular Topics task flow.

**Figure 46–17  Popular Topics Task Flow**

Users with Edit privileges can access the task flow’s Component Properties dialog in Composer. For information about configuring a discussions task flow to display the discussions from a particular portal or from all portals, see Section 46.7, "Setting Discussions Task Flow Properties."

### 46.7 Setting Discussions Task Flow Properties

The discussions task flows have associated properties, which users with sufficient privileges can access through the Component Properties dialog in Composer (Figure 46–18).

**Figure 46–18  Discussion Forums Task Flow Component Properties**

For information about accessing the Component Properties dialog, see Section 14.3, "Modifying Component Properties."
The following sections provide information about properties of the discussions task flows and describe the properties on the Parameters tab.

- Section 46.7.1, "About the Discussions Task Flow Properties"
- Section 46.7.2, "Discussions Task Flow Parameters"

### 46.7.1 About the Discussions Task Flow Properties

The properties on the Parameters tab of the Component Properties dialog control the default task flow content. For descriptions of the parameters on this tab, see Section 46.7.2, "Discussions Task Flow Parameters." For some task flows, parameters on this tab facilitate the wiring of the task flow to page parameters and page definition variables. For more information, see Chapter 19, "Wiring Pages, Task Flows, Portlets, and ADF Components."

Changes to the properties on the Display Options, Style, and Content Style tabs affect the appearance and behavior of the task flow for all users. These properties are common to all task flows. For more information, see Section 14.3, "Modifying Component Properties."

The contents of the Events tab depend on the events supported by the task flow. For more information, see Section 14.3.7, "Working with Component Contextual Events."

The Child Components tab displays all of the components contained within the current component. It provides controls for rearranging, showing, and hiding child components. Not all components contain children. So this tab may be omitted. For more information, see Section 14.3.5, "Working with Child Components."

All properties on the Parameters and Display Options tabs provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the icon next to a property, then select Expression Builder to open the editor. For more information about using the editor and for descriptions of common EL expressions, see the "Expression Language Expressions" appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

---

**Note:** When you enter EL on the generic Display Options tab in the Component Properties 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 14–1, "Display Options Properties".

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

---

If you need EL assistance, an application developer can provide an EL expression; see the "Expression Language Expressions" appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

### 46.7.2 Discussions Task Flow Parameters

Table 46–1 describes the properties that are unique to the discussions task flows.
Table 46–1  
Discussions Task Flow Parameters

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
<th>Task Flow</th>
</tr>
</thead>
</table>
| **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: 

\[ \#{\text{sessionContext[}}'\text{oracle.webcenter.collab.forum'}\text{.groupInfo['} \text{PortalName'}\text{].categoryId} \]

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 the “Expression Language Expressions” appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.                                                                 | [Discussion Forums](#)  
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: 

\[ \#{\text{sessionContext[}}'\text{oracle.webcenter.collab.forum'}\text{.groupInfo['} \text{PortalName'}\text{].forumId} \]

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 

\[ ${\text{sessionContext[}}'\text{oracle.webcenter.collab.forum'}\text{.groupInfo[portalContext.currentPortalName].forumId}} \]. Delete this value and save the page.                                                                 | [Discussion Forums](#)  
Discussion Forums  
Popular Topics  
Recent Topics  
Watched Topics |
| **Hide Toolbar**| A means of showing or hiding the task flow personalization feature (see the "Showing and Hiding Additional Discussion Forum Information" section in Using 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](#)  
Popular Topics  
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 moderator 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 participants. 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 the "Working with Discussions" chapter in Using Oracle WebCenter Portal.

Only portal moderators can create, edit, and delete discussion forums, described in this section.
This section contains the following subsections:

- Section 46.8.1, "Creating a Discussion Forum"
- Section 46.8.2, "Editing the Forum Name and Description"
- Section 46.8.3, "Deleting a Discussion Forum"

### 46.8.1 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 moderators can allocate multiple forums to a portal if required, as described in Section 46.3, "Modifying Discussion Forum Settings for a Portal.”

To create a discussion forum:

*Note:* To create forums, you must be the portal moderator, 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 46–19)

   **Figure 46–19  Discussions Page with Multiple Forums Enabled**

   ![Image](image1.png)

2. Click the **Forums** link, and then click **Create Forum** (Figure 46–20).

   **Figure 46–20  Create Forum**

   ![Image](image2.png)

   The Create Forum dialog opens (Figure 46–21).
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 46–22). Click a forum name to view forum content.

### 46.8.2 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 moderator, 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 you want to edit.
   The forum page opens (Figure 46–23).
2. Click **Edit Forum**.

   The Edit Forum dialog opens (Figure 46–24).

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**.

### 46.8.3 Deleting a Discussion Forum

To delete a discussion forum:

**Note:** To delete a discussion forum, you must be the portal moderator, 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 forum you want to delete.
   The forum page opens (Figure 46–25).
2. Click **Delete Forum**.

3. In the Delete Forum dialog that opens (**Figure 46–26**), click **Delete** to confirm the operation.

**Figure 46–26  Delete Forum Dialog**

![Delete Forum Dialog](image)

The forum and all the topics associated with the forum are deleted.
Adding Lists of Information to a Portal

This chapter describes how to manage lists in WebCenter Portal. 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. When the list becomes available in the resource catalog, you can then add the list from the catalog to any page in the portal in which it was created.

This chapter includes the following topics:

- Section 47.1, "Prerequisites for Working with Lists"
- Section 47.2, "About Lists"
- Section 47.3, "Adding a Lists Page to a Portal"
- Section 47.4, "Adding a Lists Task Flow to a Page"
- Section 47.5, "Setting List Viewer Task Flow Properties"
- Section 47.6, "Working with the Lists Task Flow"
Prerequisites for Working with Lists

Permissions: To perform the tasks in this chapter, you need the portal-level permission Manage Security and Configuration or Manage Configuration. A portal moderator has this permission by default. Additionally:

- To add and work with the Lists task flow, you need permissions to Edit Pages (to add the Lists task flow to a page).
- To create and manage lists, you need the permission Basic Services: Edit Page Access, Structure, and Content (simple permissions) or Create, Edit, and Delete Pages (advanced permissions).

Permissions to work with lists are granted by default to the portal Participant role. To manage access to lists, you need one or more advanced permissions:

- Create, Edit, and Delete Lists
- Create Lists
- Edit Lists
- Delete Lists
- Edit List Data
- View Lists

For more information about permissions, see Section 29.1, "About Roles and Permissions for a Portal."

47.1 Prerequisites for Working with Lists

For lists to be available in a portal, the portal moderator 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 Section 39.2, "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 Section A.7, "Pretty URLs for Pages in a Specified Portal").
  - Add a page link to the Lists page in the portal navigation (see Section 47.3, "Adding a Lists Page to a Portal").
  - Add the Lists task flow to a page in the portal (see Section 47.4, "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 Section 47.4, "Adding a Lists Task Flow to a Page.").

Note: For information about working with lists, Section 47.6, "Working with the Lists Task Flow."
47.2 About Lists

Lists provides 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).

![Lists on the Lists Page](image)

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.

![A List in the List Viewer Task Flow](image)
The List Viewer provides easy access to all the features required for adding and revising list data, importing or 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 the "Linking Information in WebCenter Portal" chapter in Using 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 Section 47.6.1, "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 Section 47.6.2, "Exporting a List and Importing a List from an Excel Spreadsheet").

The list is rendered within a List Viewer task flow. See Section 47.6, "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 Section 47.3, "Adding a Lists Page to a Portal" to expose the Lists page in the portal.

---

**Note:** Lists are not available in the Home portal.

---

Through tight integration with links, lists provides the opportunity to associate other WebCenter Portal assets 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 the "Linking Information in WebCenter Portal" chapter in Using Oracle WebCenter Portal).

Lists additionally provide RSS feeds for all lists, if RSS is enabled in the portal (see Section 7.2.7, "Enabling or Disabling RSS News Feeds for a Portal"). See the "Obtaining List News Feeds" section in Using Oracle WebCenter Portal for using RSS in lists.

### 47.3 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 Section 13.2, "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.

---

### 47.4 Adding a Lists Task Flow to a Page

For the steps to add a lists task flow to a page, see Section 14.2, "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 Portal 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 viewer on the Lists page. If no lists have been created, the Default Portal Catalog shows an empty folder.

For more information about creating a list, editing the list structure, copying a list, and deleting a list, see the “Creating and Managing Lists” section in Using 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 47–3).

Figure 47–3 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 47–4).
47.5 Setting List Viewer Task Flow Properties

The List Viewer task flow has associated properties, which users with sufficient privileges can access through the Component Properties dialog in Composer (Figure 47–5).
47.5 Setting List Viewer Task Flow Properties

47.5.1 About List Viewer Task Flow Properties

When you set property values on a List Viewer task flow, you are affecting only the task flow instance on which the value is set. Other instances of the same task flow are not affected by such changes.

The properties on the Parameters tab of the Component Properties dialog control the default task flow content. For descriptions of the parameters on this tab, see Section 47.5.2, "List Viewer Task Flow Parameters." For some task flows, parameters on this tab facilitate the wiring of the task flow to page parameters and page definition variables. For more information, see Chapter 19, "Wiring Pages, Task Flows, Portlets, and ADF Components."

Changes to the properties on the Display Options, Style, and Content Style tabs affect the appearance and behavior of the task flow for all users. These properties are common to all task flows. For more information, see Section 14.3, "Modifying Component Properties."

All properties on the Parameters and Display Options tabs provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the icon next to a property, then select Expression Builder to open the editor.

See Also: For information about accessing the Component Properties dialog, see Section 14.3, "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:

- Section 47.5.1, "About List Viewer Task Flow Properties"
- Section 47.5.2, "List Viewer Task Flow Parameters"
If you need EL assistance, an application developer can provide an EL expression; see the "Expression Language Expressions" appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

The contents of the Events tab depend on the events supported by the task flow. For more information, see Section 14.3.7, "Working with Component Contextual Events."

### 47.5.2 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>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>List ID</td>
<td>A unique identifier for the list to show</td>
</tr>
<tr>
<td></td>
<td>Either List ID or Local List ID must have a value. This value is set</td>
</tr>
<tr>
<td></td>
<td>automatically. Do not edit this value.</td>
</tr>
<tr>
<td>List Scope ID</td>
<td>A unique identifier for the scope containing the list</td>
</tr>
<tr>
<td></td>
<td>If no value is present, the current scope is used. This value is set</td>
</tr>
<tr>
<td></td>
<td>automatically. Do not edit this value.</td>
</tr>
<tr>
<td>Local List Customization ID</td>
<td>A unique identifier within the scope for the list customization</td>
</tr>
<tr>
<td></td>
<td>This value is set automatically. Do not edit this value.</td>
</tr>
<tr>
<td>Local List ID</td>
<td>A unique identifier within the scope for the list to show</td>
</tr>
<tr>
<td></td>
<td>Either List ID or Local List ID must have a value. This value is set</td>
</tr>
<tr>
<td></td>
<td>automatically. Do not edit this value.</td>
</tr>
<tr>
<td>Show List Name and Description</td>
<td>A check box for specifying whether to display the list name and description</td>
</tr>
<tr>
<td></td>
<td>If no value is present, the list name and description are not shown. Values</td>
</tr>
<tr>
<td></td>
<td>include true and false. This value is set automatically. Do not edit this</td>
</tr>
<tr>
<td></td>
<td>value.</td>
</tr>
</tbody>
</table>

### 47.6 Working with the Lists Task Flow

This section describes how to use the Lists task flow in the portal moderator role. It includes the following subsections:

- Section 47.6.1, "Customizing Lists"
- Section 47.6.2, "Exporting a List and Importing a List from an Excel Spreadsheet"

See the "Working with Lists" chapter in Using Oracle WebCenter Portal for the following tasks:

- "Viewing Lists"
“Creating and Managing Lists” section 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” section 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” section describes how to send a link of a specific list to other users.

47.6.1 Customizing Lists

You can perform user customizations on your own view of a list instance, or you as the portal moderator 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 page edit mode (that is, in Composer). 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, 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 the "Customizing Lists" section in Using Oracle WebCenter Portal.

47.6.1.1 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 moderator 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 Edit mode in Composer.
   See Section 12.4.3, "Opening a Page in the Page Editor (Composer)."
3. Customize the list for all users.
   See Using Oracle WebCenter Portal for the following customizations 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"

47.6.2 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 the "Creating Lists" section in Using 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:

- **Section 47.6.2.1, "About Exporting and Importing Lists"**
- **Section 47.6.2.2, "Exporting a List to a Spreadsheet"**
- **Section 47.6.2.3, "Importing an Exported List"**

47.6.2.1 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.

47.6.2.2 Exporting a List to a Spreadsheet
When you can view a list, you can export the list to a Microsoft Excel file. Exporting enables you to use your Excel skills to easily add to and revise list data. Controls for exporting lists are available in both the List Viewer task flow and on the Lists page.

To export a list:
1. Go to the list you want to export, and select Export from the Actions drop-down list.
2. Select a format for the output file (Figure 47–6):
   - MS Excel 2007
   - MS Excel 1997 - 2003
3. Follow your browser's prompts to save the exported file to your local file system.

   The list is saved in the Excel format you select. The file name is the list name, with underscores in place of character spaces. For example, my list becomes my_list.xlsx or my_list.xls.

   Figure 47–6  Export to Excel Dialog

47.6.2.3 Importing an Exported List
After you have created or revised list data and saved it in an Excel format, you can import it using controls available in both the List Viewer task flow and on the Lists page. To import list data, you must have, minimally, Edit permission on the page that contains the list.

To import an exported list:
1. Go to the list into which to import a spreadsheet, and select Import from the Actions drop-down list.
2. In the Import from Excel dialog (Figure 47–7), click the **Browse** button and navigate to and select the relevant spreadsheet.

**Note:** The spreadsheet must have the same columns as the list.

The file must be in Excel 1997-2003 (*.xls) or 2007 format (*.xlsx).

![Figure 47–7 Import from Excel Dialog](image)

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.

The list is refreshed, now displaying the imported data. List data is validated on import. If any rows contain validation errors, such errors are presented in a dialog and the import is terminated. You can correct validation errors in the spreadsheet and import again.
This chapter describes the mail feature and how to manage mail in a portal. It also describes how to configure the 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.

This chapter includes the following topics:

- Section 48.1, "Prerequisites for the Mail Service"
- Section 48.2, "Configuring the Mail Distribution List for a Portal"
- Section 48.3, "Configuring the Send Mail Feature"
- Section 48.4, "About the Mail Task Flow"
- Section 48.5, "Logging in to the Mail Task Flow"
- Section 48.6, "Adding the Mail Task Flow to a Page"
- Section 48.7, "Setting Mail Task Flow Properties"

**Permissions:** To perform the tasks in this chapter, you need the portal-level permission Manage Security and Configuration or Manage Configuration.

To add the Mail task flow to a page, you need the portal-level permission Basic Services: Edit Page Access, Structure, and Content (simple permissions) or Create, Edit, and Delete Pages (advanced permissions).

A portal moderator has these permissions by default.

For more information about permissions, see Section 29.1, "About Roles and Permissions for a Portal."

### 48.1 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 the "Managing Mail" chapter in *Administering Oracle WebCenter Portal.*
Enable the Send Mail feature for WebCenter Portal, as described in the "Configuring Send Mail Notifications" section in Administering Oracle WebCenter Portal.

See Also: "Troubleshooting Issues with Mail" section in Administering Oracle WebCenter Portal.

To make the Mail service available in a portal, the portal moderator 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 Section 48.2, "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 Section 48.6, "Adding the Mail Task Flow to a Page."

Note: For information about the Send Mail feature and how to use mail, see the "Sending and Viewing Mail" section in Using Oracle WebCenter Portal.

48.2 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 the "Managing Mail" chapter in Administering Oracle WebCenter Portal.

Notes:

- With some browsers, Send Mail notifications are garbled for many non-English languages. When multibyte characters are encoded (required for the "mailto:" protocol), the URL length exceeds the browser limit. As a workaround, configure the Send Mail feature to use WebCenter Portal's Mail service instead of the local mail client. For more information, see the "Configuring Send Mail Notifications" section 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 also, the "Registering Mail Servers" section 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(i.e Exchange Server), which contains 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 \texttt{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 the “Sending Mail to Portal Members or Moderators” section in Using 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 (see Section 7.8.1, "Accessing Tools and Services Administration for a Portal"), select Mail (Figure 48–1).
   
   You can also enter the following URL in your browser to navigate directly to the Tools and Services page:
   
   \url{http://host:port/webcenter/portal/portalName/admin/services}

   \textbf{See Also:} Appendix A, "WebCenter Portal Pretty URLs"

\begin{figure}
\centering
\includegraphics[width=\textwidth]{Figure_48-1.png}
\caption{Configuring the Mail Distribution List for a Portal}
\end{figure}

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 the "setMailServiceProperty" section in *WebLogic Scripting Tool Command Reference*.

5. **Click Save.**

### 48.2.1 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 the "Enabling Shared Mail Connections for Send Mail Notifications" section 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 the "Setting Up a Shared Mail Connection" section in *Administering Oracle WebCenter Portal*.

3. In the portal administration (see Section 7.1, "Accessing Portal Administration"), click **Attributes**.

4. **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**

<table>
<thead>
<tr>
<th>Name</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>collab.mail.compose.sharedConnectionName</td>
<td>Name of the shared mail connection. For example: MySharedMailConnection</td>
</tr>
<tr>
<td>notifications.use.mail.composer</td>
<td>Must be set to true.</td>
</tr>
</tbody>
</table>

![Figure 48–2 Setting Shared Mail Connection Attributes for a Portal](image)

6. (Optional). By default, Send Mail notifications are disabled for public or anonymous users. To enable them in a portal, add the following portal custom attribute:

   notifications.anonymous.enabled = true

### 48.3 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).
48.3.1 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 the "Selecting Your Preferred Mail Connection" section in Using Oracle WebCenter Portal.

48.4 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 the "Sending and Viewing Mail" section in Using 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...
About the Mail Task Flow

the “Selecting Your Preferred Mail Connection” section in *Using 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.

![Mail Task Flow](image)

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 moderator 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 Section 48.2, "Configuring the Mail Distribution List for a Portal."

All mail sent to a portal mailing list are also posted to the portal discussion forum.

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 the "Using Instant Messaging and Presence Viewer" section in *Using Oracle WebCenter Portal*.
Users with page-edit privileges can access the task flow’s region parameter through the Component Properties dialog in Composer. For more information about setting the Mail task flow properties, see Section 48.7, “Setting Mail Task Flow Properties.”

48.5 Logging in to the Mail Task Flow

If you are using a local mail client, before you can access your mail in WebCenter Portal, you must provide your mail login credentials. The first time you access a Mail task flow, it displays the message depicted in Figure 48–6. All users have to log in the first time they are accessing mail.

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).
   
   The External Application Login dialog (Figure 48–7) opens.
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.

### 48.6 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 Section 14.2, "Adding a Component to a Page."

**Tip:** The presence or location of the Mail task flow depends on how the resource catalog is configured. For example, in the Default Portal Catalog, the Mail task flow is included under the Social and Communication folder.

### 48.7 Setting Mail Task Flow Properties

The Mail task flow has associated properties, which users with sufficient privileges can access from the Component Properties dialog in Composer (Figure 48–8).

*Figure 48–8  Mail Task Flow Component Properties*

For information about accessing the Component Properties dialog, see Section 14.3, "Modifying Component Properties."

The following sections provide information about properties of the Mail task flow and describe the properties on the Parameters tab.

- Section 48.7.1, "About the Mail Task Flow Properties"
- Section 48.7.2, "Mail Task Flow Parameters"

#### 48.7.1 About the Mail Task Flow Properties

The properties on the Parameters tab of the Component Properties dialog control the default task flow content. For descriptions of the parameters on this tab, see Section 48.7.2, "Mail Task Flow Parameters." For some task flows, parameters on this tab facilitate the wiring of the task flow to page parameters and page definition variables. For more information, see Chapter 19, "Wiring Pages, Task Flows, Portlets, and ADF Components."

Changes to the properties on the Display Options, Style, and Content Style tabs affect the appearance and behavior of the task flow for all users. These properties are
common to all task flows. For more information, see Section 14.3, "Modifying Component Properties."

The content of the Events tab depends on the events supported by the task flow. For more information, see Section 14.3.7, "Working with Component Contextual Events."

The Child Components tab displays all of the components contained within the current component. It provides controls for rearranging, showing, and hiding child components. Not all components contain children, so you might find no content on this tab. For more information, see Section 14.3.5, "Working with Child Components."

All properties on the Parameters and Display Options tabs provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the ▼ icon next to a property, then select Expression Builder to open the editor.

**Note:** When you enter EL on the generic Display Options tab in the Component Properties 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 14–1, "Display Options Properties".

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

If you need EL assistance, an application developer can provide an EL expression; see the "Expression Language Expressions" appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

### 48.7.2 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 48–9 illustrates a tabular format Mail task flow.

**Figure 48–9  A Mail Task Flow where the Parameter Tabular Is Set to True**

<table>
<thead>
<tr>
<th>Subject</th>
<th>User Name</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>membersSubjectS1</td>
<td><a href="mailto:monty@mycompany.com">monty@mycompany.com</a></td>
<td>4/8/13 15:46 PM</td>
</tr>
<tr>
<td>discussionSubjectS1</td>
<td><a href="mailto:monty@mycompany.com">monty@mycompany.com</a></td>
<td>4/8/13 14:56 PM</td>
</tr>
<tr>
<td>announcementSubjectS1</td>
<td><a href="mailto:monty@mycompany.com">monty@mycompany.com</a></td>
<td>4/8/13 14:54 PM</td>
</tr>
<tr>
<td>membersSubjectD0y</td>
<td><a href="mailto:monty@mycompany.com">monty@mycompany.com</a></td>
<td>4/8/13 14:56 PM</td>
</tr>
<tr>
<td>discussionSubjectD0y</td>
<td><a href="mailto:monty@mycompany.com">monty@mycompany.com</a></td>
<td>4/8/13 14:54 PM</td>
</tr>
<tr>
<td>announcementSubjectD0y</td>
<td><a href="mailto:monty@mycompany.com">monty@mycompany.com</a></td>
<td>4/8/13 14:56 PM</td>
</tr>
<tr>
<td>membersSubjectD9y</td>
<td><a href="mailto:monty@mycompany.com">monty@mycompany.com</a></td>
<td>4/8/13 14:46 PM</td>
</tr>
</tbody>
</table>
This chapter describes how to add Message Board and Feedback task flows to a portal. Message Board task flows enable users to post, view, and manage messages to and from their connections. Feedback task flows enable users to post, view, and manage feedback to and from their connections.

This chapter includes the following topics:

- Section 49.1, "About Message Board"
- Section 49.2, "About Feedback"
- Section 49.3, "Adding a Message Board or Feedback Task Flow to a Page"
- Section 49.4, "Setting Message Board and Feedback Task Flow Properties"
- Section 49.5, "Working with Message Board and Feedback Task Flows"

Permissions: To perform the tasks in this chapter, you need the portal-level permission Basic Services: Edit Page Access and Structure (standard permissions) or Pages: Edit Pages (advanced permissions). A portal moderator has this permission by default.

For more information about permissions, see Section 29.1, "About Roles and Permissions for a Portal."

### 49.1 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.
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)

---

**Table 49–1  Page Permissions for a Portal Message Board**

<table>
<thead>
<tr>
<th>Page Permission</th>
<th>Post</th>
<th>View</th>
<th>Update</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>View Page</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Personalize Page</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes for messages posted by this user</td>
<td>Yes for messages posted by this user</td>
</tr>
<tr>
<td>Perform All Page Actions</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes for all messages</td>
<td>Yes for all messages</td>
</tr>
</tbody>
</table>

**See Also:** Chapter 29, "Managing Roles and Permissions for a Portal"

**Notes:**

- 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 the "Configuring Message Board" section 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).
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

See Also: The Publisher task flow has many qualities in common with Message Board, but is a separate feature. For more information about the Publisher task flow, see the "Liking, Commenting On, and Sharing Items in WebCenter Portal" chapter in Using Oracle WebCenter Portal.

For more information about Message Board features, see the "Working with Feedback and the Message Board" chapter in Using Oracle WebCenter Portal.

49.2 About Feedback

Note: The Feedback task flows are intended for use in a personal page because they must be associated with an individual user.

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)
49.3 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 Section 14.2, "Adding a Component to a Page."

**Note:** The presence or location of a Message Board or Feedback task flow in the resource catalog depends on how the resource catalog is configured. For example, in the Default Portal Catalog, the Message Board task flows are included under the Social and Communication 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 Section 23.5.1, "Adding a Resource to a Resource Catalog" (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 Section 7.3.5, "Changing the Resource Catalogs for Pages and the Page Template for a Portal."
49.4 Setting Message Board and Feedback Task Flow Properties

Note: The Feedback task flows are intended for use in a 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 Oracle WebCenter Portal.

Both Message Board and Feedback task flows have associated properties, which users with sufficient privileges can access through the Component Properties dialog in Composer (Figure 49–5).

Figure 49–5  Component Properties Dialog for a Feedback Task Flow

See Also:  Section 14.3.2, "Setting Properties on a Component"

The following sections provide information about properties of Message Board and Feedback task flows and describe the properties on the Parameters tab:

- Section 49.4.1, "About Message Board and Feedback Task Flow Properties"
- Section 49.4.2, "Message Board and Feedback Task Flow Parameters"
- Section 49.4.3, "Using Parameters to Configure Message Board and Feedback Task Flow Instances"
49.4.1 About Message Board and Feedback Task Flow Properties

When you set property values on a Message Board or Feedback task flow, you are affecting only the task flow instance on which the value is set. Other instances of the same task flow are not affected by such changes.

The properties on the Parameters tab of the Component Properties dialog can affect the default task flow content. For descriptions of the parameters on this tab, see Section 49.4.2, "Message Board and Feedback Task Flow Parameters." For some task flows, parameters on this tab facilitate the wiring of the task flow to page parameters and page definition variables. For more information, see Chapter 19, "Wiring Pages, Task Flows, Portlets, and ADF Components."

Changes to the properties on the Display Options, Style, and Content Style tabs affect the appearance and behavior of the task flow. These properties are common to all task flows. For more information, see Section 14.3.4, "Working with Component Display Options" and Section 14.3.6, "Working with Style and Content Style Properties."

The content of the Events tab depends on the events supported by the task flow. For more information, see Section 14.3.7, "Working with Component Contextual Events."

All properties on the Parameters and Display Options tabs provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the icon next to a property, then select Expression Builder to open the editor.

Note: When you enter EL on the generic Display Options tab in the Component Properties 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 14–1, "Display Options Properties".

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

If you need EL assistance, an application developer can provide an EL expression; see the "Expression Language Expressions" appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

49.4.2 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

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display Message Size</td>
<td>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.</td>
</tr>
<tr>
<td>End Date</td>
<td>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</td>
</tr>
<tr>
<td>Group Space</td>
<td>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</td>
</tr>
<tr>
<td>Hide Actions</td>
<td>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</td>
</tr>
<tr>
<td>Hide Footer</td>
<td>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</td>
</tr>
</tbody>
</table>
### Table 49–2 (Cont.) Message Board and Feedback Task Flow Parameters

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Hide Given</strong></td>
<td>Specifies whether to enable or disable the display of Feedback left for others</td>
</tr>
<tr>
<td></td>
<td>- Select the check box to disable the display of Feedback left for others in a given task flow instance (#{true}).</td>
</tr>
<tr>
<td></td>
<td>- Deselect the check box to allow the display of Feedback left for others in a given task flow instance (#{false}).</td>
</tr>
<tr>
<td></td>
<td>Selecting <strong>Hide Given</strong> hides the View menu so that only Feedback received is shown.</td>
</tr>
<tr>
<td></td>
<td>This parameter is associated with the following task flows:</td>
</tr>
<tr>
<td></td>
<td>- Feedback</td>
</tr>
<tr>
<td></td>
<td>- Feedback - Quick View</td>
</tr>
<tr>
<td><strong>Hide Header</strong></td>
<td>Specifies whether to show or hide the task flow header</td>
</tr>
<tr>
<td></td>
<td>- Select the check box to hide the task flow header (#{true}).</td>
</tr>
<tr>
<td></td>
<td>- Deselect the check box to show the task flow header (#{false}).</td>
</tr>
<tr>
<td></td>
<td>This parameter is associated with the following task flows:</td>
</tr>
<tr>
<td></td>
<td>- Feedback</td>
</tr>
<tr>
<td></td>
<td>- Feedback - Quick View</td>
</tr>
<tr>
<td></td>
<td>- Message Board</td>
</tr>
<tr>
<td></td>
<td>- Message Board - Quick View</td>
</tr>
<tr>
<td><strong>Hide Publisher</strong></td>
<td>Specifies whether to show or hide the message entry field and the upload file and URL controls (the Publisher)</td>
</tr>
<tr>
<td></td>
<td>- Select the check box to disable the display of the message entry field in a given task flow instance (#{true}).</td>
</tr>
<tr>
<td></td>
<td>- Deselect the check box to allow the display of the message entry field in a given task flow instance (#{false}).</td>
</tr>
<tr>
<td></td>
<td>This parameter is associated with the following task flows:</td>
</tr>
<tr>
<td></td>
<td>- Message Board</td>
</tr>
<tr>
<td></td>
<td>- Message Board - Quick View</td>
</tr>
<tr>
<td><strong>Message Type</strong></td>
<td>Specifies the types of messages to display:</td>
</tr>
<tr>
<td></td>
<td>- All - (default) Displays both public and private messages.</td>
</tr>
<tr>
<td></td>
<td>- Public - Displays only public messages.</td>
</tr>
<tr>
<td></td>
<td>- Private - Displays only private messages.</td>
</tr>
<tr>
<td></td>
<td>This parameter applies only when user is viewing own message board.</td>
</tr>
<tr>
<td></td>
<td>This parameter is associated with the following task flows:</td>
</tr>
<tr>
<td></td>
<td>- Message Board</td>
</tr>
<tr>
<td></td>
<td>- Message Board - Quick View</td>
</tr>
</tbody>
</table>
### Table 49–2 (Cont.) Message Board and Feedback Task Flow Parameters

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>No of Feedback items</td>
<td>The number of Feedback items to show in the task flow</td>
</tr>
<tr>
<td></td>
<td>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</td>
</tr>
<tr>
<td>No of Messages</td>
<td>The number of messages to show in the task flow</td>
</tr>
<tr>
<td></td>
<td>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</td>
</tr>
<tr>
<td>Resource Id</td>
<td>The ID of the user to show in the task flow</td>
</tr>
<tr>
<td></td>
<td>This value is set automatically, #{securityContext.userName}, which returns the name of the current user.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> If you need EL assistance, an application developer can provide an EL expression; see the “Expression Language Expressions” appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper. This parameter is associated with the Feedback task flow.</td>
</tr>
</tbody>
</table>
The properties associated with Message Board and Feedback task flows make it possible to control such things as the number of messages to show, the maximum length of Feedback posts, the presence or absence of a message input field, and so on. Setting task flow properties affects every users’ view of the task flow instance.

This section provides examples of how to use task flow parameters to achieve these results. It includes the following subsections:

- Section 49.4.3.1, "Hiding Action Links and Icons on a Task Flow Instance"
- Section 49.4.3.2, "Limiting the Number of Messages and Feedback Posts Shown"
- Section 49.4.3.3, "Limiting the Length of Posts in a Feedback - Quick View Task Flow"
- Section 49.4.3.4, "Preventing Users from Adding Messages to Message Board"
- Section 49.4.3.5, "Hiding the Feedback You Have Left for Others"
- Section 49.4.3.6, "Scoping the Display of Messages to a Named Portal"
- Section 49.4.3.7, "Specifying the Date Range of Shown Messages and Feedback"
49.4.3.1 Hiding Action Links and Icons on a Task Flow Instance

Users with page edit privileges can set the Hide Actions parameter on a Message Board - Quick View or Feedback - Quick View task flow to hide the actions normally associated with each posted message. Such actions include the Edit, Hide, and Private links and the Delete icon (Figure 49–6).

Figure 49–6 Actions on a Message Board Message

Karen Walker
Thanks for everyone's help today!
12:10 AM on 6/28/13 - Comment - Like

To hide actions on a Message Board - Quick View or Feedback - Quick View task flow instance:

1. Open the Component Properties dialog for the Message Board - Quick View or Feedback - Quick View task flow instance you want to configure.

   See Also: Section 14.3.2, "Setting Properties on a Component"

2. In the Component Properties dialog, on the Parameters tab, select Hide Actions.

   Note: To show hidden actions, deselect Hide Actions.

3. When you finish revising component properties, click OK.

4. Save your changes, and exit the page editor.

49.4.3.2 Limiting the Number of Messages and Feedback Posts Shown

Parameters on all Message Board and Feedback task flow types enable you to specify how many messages or Feedback posts to show in a given task flow instance. When the number of messages or posts exceeds the value that you provide:

- Previous and Next icons appear on the full task flow views, enabling users to page through all messages and posts.

- A More link appears on task flow quick views. Users click this to launch a dynamically-generated page that shows all messages or posts.

For Message Board and Message Board - Quick View task flows, use the No of Messages parameter. For Feedback and Feedback - Quick View task flows, use the No of Feedback Items parameter.

To limit the number of messages and feedback posts shown in a given task flow instance:

1. Open the Component Properties dialog for the Message Board or Feedback task flow instance you want to configure.

   See Also: Section 14.3.2, "Setting Properties on a Component"

2. In the Component Properties dialog, on the Parameters tab, 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 properties, click **OK**.
4. Save your changes, and exit the page editor.

### 49.4.3.3 Limiting the Length of Posts in a Feedback - Quick View Task Flow

Use the **Display Message Size** parameter on a Feedback - Quick View task flow instance to limit the number of characters that can be entered for a given post. Posts that exceed the limit are truncated.

To limit the number of characters allowed for a post to a Feedback - Quick View task flow:

1. Open the Component Properties dialog for the Feedback - Quick View task flow instance you want to configure.

   **See Also:** [Section 14.3.2, "Setting Properties on a Component"]

2. In the Component Properties dialog, on the **Parameters** tab, in the **Display Message Size** box, enter the number of characters to allow for a given post.
3. When you finish revising component properties, click **OK**.
4. Save your changes, and exit the page editor.

### 49.4.3.4 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. Open the Component Properties dialog for the Message Board task flow instance you want to configure.

   **See Also:** [Section 14.3.2, "Setting Properties on a Component"]

2. In the Component Properties dialog, on the **Parameters** tab, select **Hide Publisher**.

   **Note:** To show Publisher controls, deselect **Hide Publisher**.

3. When you finish revising component properties, click **OK**.
4. Save your changes, and exit the page editor.

### 49.4.3.5 Hiding the Feedback You Have Left for Others

You can use the **Hide Given** parameter to prevent the display of the Feedback you have left for others in both types of Feedback task flows. Selecting **Hide Given** hides the **View** menu, so that only Feedback received is shown.

To hide the Feedback you have left for others:

1. Open the Component Properties dialog for the Feedback task flow instance you want to configure.
Setting Message Board and Feedback Task Flow Properties

See Also:  Section 14.3.2, "Setting Properties on a Component"

2. In the Component Properties dialog, on the Parameters tab, select Hide Given.

Note: To show the View menu, deselect Hide Given.

3. When you finish revising component properties, click OK.
4. Save your changes, and exit the page editor.

49.4.3.6 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. Open the Component Properties dialog for the Message Board task flow instance you want to configure.

See Also:  Section 14.3.2, "Setting Properties on a Component"

2. In the Component Properties dialog, on the Parameters tab, 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 properties, click OK.
4. Save your changes, and exit the page editor.

49.4.3.7 Specifying the Date Range of Shown Messages and Feedback
You can use the Start Date and End Date parameters on the Message Board, Feedback, and Feedback - Quick View task flows to limit the display of messages and feedback posts to those entered between the two specified dates.

For both parameters, use the date format YYYY-MM-DD, for example 2010-01-02.

To limit the display of messages and feedback posts to those entered within a specified date range:

1. Open the Component Properties dialog for the Message Board or Feedback task flow instance you want to configure.

See Also:  Section 14.3.2, "Setting Properties on a Component"

2. In the Component Properties dialog, on the Parameters tab, 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 properties, click OK.

4. Save your changes, and exit the page editor.

49.5 Working with Message Board and Feedback Task Flows

For information about how users work with Message Board and Feedback task flows, see the "Working with Feedback and the Message Board" chapter in Using Oracle WebCenter Portal.
Adding Notifications to a Portal

This chapter describes how to add Notifications task flows to a portal. Notifications enable users to receive timely notice of changes to the portal objects and content they subscribed to. Users can track changes to their connections, their portal memberships, specific portals, and to the application objects that are important to them. Users can be notified about these changes through texts, mail, or their Worklists.

This chapter includes the following topics:

- Section 50.1, "About Subscriptions and Notifications"
- Section 50.2, "Adding a Notifications Task Flow to a Page"
- Section 50.3, "Setting Notifications Task Flow Properties"
- Section 50.4, "Working with Notifications Task Flows"

Permissions: To perform the tasks in this chapter, you need the portal-level permission Basic Services: Edit Page Access and Structure (standard permissions) or Pages: Edit Pages (advanced permissions). A portal moderator has this permission by default.

For more information about permissions, see Section 29.1, "About Roles and Permissions for a Portal."

50.1 About Subscriptions and Notifications

Notifications provide an automated means of triggering notices across different messaging channels. Messages are triggered when the portals and application objects to which a user has subscribed change.

Messaging channels can include phone text, mail, or Worklist (depending on how your administrator has configured Notifications). For example, a user can receive a mail message when a particular document changes, a text message when someone responds to a particular discussion topic, a Worklist alert when they receive an invitation to connect. All messages contain links that take the user to the scene of the change.

Users can select the objects that trigger a notice by subscribing to them. In WebCenter Portal, there are three levels of subscription:

- **Application**, which users can use to receive notices about changes to their portal memberships, Message Board, Connections, and Feedback

  Such notifications occur only for application-level activities that involve the user directly.
About Subscriptions and Notifications

- **Portal**, for changes to a subscribed tools, such as Events, Discussions, Announcements, Documents, and Blogs, that occur within the scope of a selected portal
- **Object**, for changes to the application objects to which users have specifically subscribed, such as a particular document, wiki, blog, and so on

Table 50–1 describes the types of activities that can trigger a notification and indicates the level and location of the associated subscription (for more information, see the "Subscribing to the Application, to Portals, and to Objects" section in *Using Oracle WebCenter Portal*).

**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 the "Setting Object-Level Subscriptions" section in *Using Oracle WebCenter Portal*.

---

**Table 50–1 Activities that Can Trigger Notifications**

<table>
<thead>
<tr>
<th>Activity</th>
<th>Level</th>
<th>Where to Subscribe</th>
</tr>
</thead>
<tbody>
<tr>
<td>A user sends you an invitation to connect</td>
<td>Application</td>
<td>Preferences (for more information, see the &quot;Setting Application-Level Subscriptions&quot; section in <em>Using Oracle WebCenter Portal</em>)</td>
</tr>
<tr>
<td><strong>Note:</strong> Out of the box, the option to send notifications for invitations to connect is enabled and is not end-user configurable.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Your portal role changes, for example from Participant to Moderator</td>
<td>Application</td>
<td>Preferences</td>
</tr>
<tr>
<td>You are added as a member of a portal</td>
<td>Application</td>
<td>Preferences</td>
</tr>
<tr>
<td>Your portal membership is removed</td>
<td>Application</td>
<td>Preferences</td>
</tr>
<tr>
<td>A user posts a message to your Message Board</td>
<td>Application</td>
<td>Preferences</td>
</tr>
<tr>
<td>A user likes your Message Board post (messages explicitly set on a Message Board and not those added from Publisher to the Activity Stream)</td>
<td>Application</td>
<td>Preferences</td>
</tr>
<tr>
<td>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)</td>
<td>Application</td>
<td>Preferences</td>
</tr>
<tr>
<td>A user posts feedback for you</td>
<td>Application</td>
<td>Preferences</td>
</tr>
<tr>
<td>An announcement is created</td>
<td>Portal</td>
<td>On the portal, for example, from the Actions menu on a portal in Browse portals (for more information, see the &quot;Setting Portal-Level Subscriptions&quot; section in <em>Using Oracle WebCenter Portal</em>)</td>
</tr>
<tr>
<td>A new event is created</td>
<td>Portal</td>
<td>On the portal</td>
</tr>
<tr>
<td>An event is updated</td>
<td>Portal</td>
<td>On the portal</td>
</tr>
<tr>
<td>An event is deleted</td>
<td>Portal</td>
<td>On the portal</td>
</tr>
<tr>
<td>A new discussion topic is created</td>
<td>Portal</td>
<td>On the portal</td>
</tr>
<tr>
<td>A new discussion forum is created</td>
<td>Portal</td>
<td>On the portal</td>
</tr>
<tr>
<td>A new document is created or uploaded</td>
<td>Portal</td>
<td>On the portal</td>
</tr>
</tbody>
</table>
About Subscriptions and Notifications

Adding Notifications to a Portal

Notifications provides the following task flows:

- **Subscription Preferences** enables users to select what types of activities about which they want to be notified. The task flow displays different options depending on whether the it is displayed in the Home portal (Figure 50–1) or a portal (Figure 50–2). The Home portal view of the Subscription Preferences task flow displays the same user interface and information that appear on the General Subscriptions tab of the Subscriptions preferences page.

### Table 50–1 (Cont.) Activities that Can Trigger Notifications

<table>
<thead>
<tr>
<th>Activity</th>
<th>Level</th>
<th>Where to Subscribe</th>
</tr>
</thead>
<tbody>
<tr>
<td>A wiki document is created</td>
<td>Portal</td>
<td>On the portal</td>
</tr>
<tr>
<td>A new blog entry is posted</td>
<td>Portal</td>
<td>On the portal</td>
</tr>
<tr>
<td>A user replies to a discussion topic</td>
<td>Object</td>
<td>On the topic (for more information, see the &quot;Setting Object-Level Subscriptions&quot; section in Using Oracle WebCenter Portal)</td>
</tr>
<tr>
<td>A user comments on a discussion topic</td>
<td>Object</td>
<td>On the topic</td>
</tr>
<tr>
<td>A user deletes a discussion topic</td>
<td>Object</td>
<td>On the topic</td>
</tr>
<tr>
<td>A user comments on a document</td>
<td>Object</td>
<td>On the document</td>
</tr>
<tr>
<td>A user likes a document</td>
<td>Object</td>
<td>On the document</td>
</tr>
<tr>
<td>A user updates a document</td>
<td>Object</td>
<td>On the document</td>
</tr>
<tr>
<td>A user deletes a document</td>
<td>Object</td>
<td>On the document</td>
</tr>
<tr>
<td>A user comments on a wiki document</td>
<td>Object</td>
<td>On the wiki</td>
</tr>
<tr>
<td>A user likes a wiki document</td>
<td>Object</td>
<td>On the wiki</td>
</tr>
<tr>
<td>A user updates a wiki document</td>
<td>Object</td>
<td>On the blog entry</td>
</tr>
<tr>
<td>A user deletes a wiki document</td>
<td>Object</td>
<td>On the blog entry</td>
</tr>
<tr>
<td>A user comments on a blog entry</td>
<td>Object</td>
<td>On the blog entry</td>
</tr>
<tr>
<td>A user likes a blog entry</td>
<td>Object</td>
<td>On the blog entry</td>
</tr>
<tr>
<td>A user updates a blog entry</td>
<td>Object</td>
<td>On the blog entry</td>
</tr>
<tr>
<td>A user deletes a blog entry</td>
<td>Object</td>
<td>On the blog entry</td>
</tr>
</tbody>
</table>

### Figure 50–1 Subscription Preferences Task Flow - Home Portal

![Subscription Preferences Task Flow - Home Portal](image-url)
Adding a Notifications Task Flow to a Page

For the steps to add a Notifications task flow to a page, see Section 14.2, "Adding a Component to a Page."

Tip: The presence or location of the Notifications task flows depends on how the resource catalog is configured. For example, in the Default Portal 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 Portal Catalog, but can be added to a custom resource catalog used by the page, as described in Section 23.5.1, "Adding a Resource to a Resource Catalog."
50.3 Setting Notifications Task Flow Properties

The Subscription Preferences task flow has associated properties, which users with sufficient privileges can access through the Component Properties dialog in Composer (Figure 50–4).

**Note:** The Subscription Viewer task flow does not have associated properties.

---

**Figure 50–4  Subscription Preferences Task Flow Component Properties**

---

**See Also:** Section 14.3.2, "Setting Properties on a Component"

The following sections provide information about properties associated with Notifications task flows and describe the properties available on the Parameters tab:

- **Section 50.3.1, "About Notifications Task Flow Properties"
- **Section 50.3.2, "Notifications Task Flow Parameters"
- **Section 50.3.3, "Hiding Save and Refresh Actions on Subscription Preferences"
- **Section 50.3.4, "Displaying Subscription Controls for One Portal in Another"

50.3.1 About Notifications Task Flow Properties

When you set property values on a Notifications task flow, you are affecting only the task flow instance on which the value is set. Other instances of the same task flow are not affected by such changes.
The properties on the Parameters tab of the Component Properties dialog can affect the default task flow content. For descriptions of the parameters on this tab, see Section 50.3.2, "Notifications Task Flow Parameters." For some task flows, parameters on this tab facilitate the wiring of the task flow to page parameters and page definition variables. For more information, see Chapter 19, "Wiring Pages, Task Flows, Portlets, and ADF Components."

Changes to the properties on the Display Options, Style, and Content Style tabs affect the appearance and behavior of the task flow. These properties are common to all task flows. For more information, see Section 14.3.4, "Working with Component Display Options" and Section 14.3.6, "Working with Style and Content Style Properties."

The content of the Events tab depends on the events supported by the task flow. For more information, see Section 14.3.7, "Working with Component Contextual Events."

All properties on the Parameters and Display Options tabs provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the icon next to a property, then select Expression Builder to open the editor.

| Note: When you enter EL on the generic Display Options tab in the Component Properties 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 14–1, "Display Options Properties". EL validation is not performed on non-generic display options. |

<table>
<thead>
<tr>
<th>Table 50–2 Subscription Preferences Task Flow Parameters</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Parameter</strong></td>
</tr>
<tr>
<td>Hide Actions</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Scope Name</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>
50.3.3 Hiding Save and Refresh Actions on Subscription Preferences

The Subscription Preferences task flow has an associated parameter, named Hide Actions, that you can use to hide the Save button and Refresh icon on a selected task flow instance.

To hide the Save and Refresh actions on a task flow instance on a page:

1. Open the Component Properties dialog for the Subscription Preferences task flow instance you want to configure.

   See Also: Section 14.3.2, "Setting Properties on a Component"

2. In the Component Properties dialog, on the Parameters tab, in the Hide Actions box, enter #{true}.

   Note: To show the Save and Refresh actions, in the Hide Actions box, enter #{false}.

3. Click OK to exit the editor.

4. When you finish revising component properties, click OK.

5. Save your changes, and exit the page editor.

50.3.4 Displaying 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 use 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. Open the Component Properties dialog for the Subscriptions Viewer task flow instance you want to configure.

   See Also: Section 14.3.2, "Setting Properties on a Component"

2. In the Component Properties dialog, on the Parameters tab, in the Scope Name field, enter the name of the portal for which to display subscription controls.

   Notes: ■ Use the portal internal name, available on the General page of Portal Builder. 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.
3. When you finish revising component properties, click **OK**.

4. Save your changes, and exit the page editor.

## 50.4 Working with Notifications Task Flows

For information about how users work with Notifications task flows, see the “Getting Notified When Things Change” chapter in *Using Oracle WebCenter Portal*. 
Adding Personal Notes to a Portal

This chapter provides general information about personal notes and includes details about adding the Notes task flow to a resource catalog and page.

This chapter includes the following topics:

- Section 51.1, "Prerequisites for Working with Notes"
- Section 51.2, "About Notes"
- Section 51.3, "Adding the Notes Task Flow to a Page"
- Section 51.4, "Setting Notes Task Flow Properties"
- Section 51.5, "Working with the Notes Task Flow"

Permissions: To perform the tasks in this chapter, you need the portal-level permission Manage Security and Configuration or Manage Configuration. A portal moderator has this permission by default.

To add the Notes task flow to a page, you need the portal-level permission Basic Services: Edit Page Access, Structure, and Content (simple permissions) or Create, Edit, and Delete Pages (advanced permissions).

To manage access to notes, you need one or more advanced permissions:

- Create, Edit, and Delete Notes
- Create Notes
- Edit Notes
- Delete Notes
- View Notes

For more information about permissions, see Section 29.1, "About Roles and Permissions for a Portal."

51.1 Prerequisites for Working with Notes

For notes to work in a portal, the portal moderator or anyone with Manage Security and Configuration or Manage Configuration permission has to perform the following tasks:

- Add the Notes task flow to the resource catalog used by the page.
For more information, see Section 23.5.1, "Adding a Resource to a Resource Catalog" (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 Section 7.3.5, “Changing the Resource Catalogs for Pages and the Page Template for a Portal.”

- Add the Notes task flow to a page in the portal, as described in Section 51.3, "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 Section 51.5, "Working with the Notes Task Flow.”

---

### 51.2 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

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, a list, or an announcement. While you can link to a new note (Figure 51–2), you cannot link to existing notes. All users who have access to the asset can view the linked note too. See the "Adding and Linking to a Note” section in Using Oracle WebCenter Portal.

#### Figure 51–2  Linking an Announcement to a New Note
51.3 Adding the Notes Task Flow to a Page

For the steps to add the Notes task flow to a page, see Section 14.2, "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 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 Section 23.5.1, "Adding a Resource to a Resource Catalog" (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 Section 7.3.5, "Changing the Resource Catalogs for Pages and the Page Template for a Portal."

---

To add the Notes task flow to a page, you need to click **Add** next to the **Notes** task flow in the resource catalog after you add it to the resource catalog, as shown in Figure 51–3.

*Figure 51–3  Selecting the Notes Task Flow from the Resource Catalog*
51.4 Setting Notes Task Flow Properties

The Notes task flow has associated properties, which users with sufficient privileges can access through the Component Properties dialog in Composer (Figure 51-4). Many properties are common to all task flows, and the method for accessing task flow properties is the same from task flow to task flow. Common task flow properties and how to access them are discussed in Section 14.3, "Modifying Component Properties."

Figure 51–4  Notes Task Flow Component Properties

To access the Component Properties dialog, see Section 14.3, "Modifying Component Properties."

The Notes task flow does not have any unique properties, and therefore no Parameters tab in the Component Properties dialog.

Changes to the properties on the Display Options, Style, and Content Style tabs affect the appearance and behavior of the task flow for all users. These properties are common to all task flows. For more information, see Section 14.3.4, "Working with Component Display Options." and Section 14.3.6, "Working with Style and Content Style Properties."

The contents of the Events tab depend on the events supported by the task flow. For more information, see Section 14.3.7, "Working with Component Contextual Events."

All properties on the Parameters and Display Options tabs provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the ▼ icon next to a property, then select Expression Builder to open the editor.
Note: When you enter EL on the generic Display Options tab in the Component Properties 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 14–1, "Display Options Properties".

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

If you need EL assistance, an application developer can provide an EL expression; see the "Expression Language Expressions" appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

51.5 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 the "Managing Your Notes" chapter in Using Oracle WebCenter Portals.
This chapter describes how to create, manage, and analyze polls, as well as how to work with the properties of the Polls task flows.

This chapter includes the following topics:

- Section 52.1, "Prerequisite for Working with Polls"
- Section 52.2, "About Polls"
- Section 52.3, "Adding a Polls Task Flow to a Page"
- Section 52.4, "Setting Polls Task Flow Properties"
- Section 52.5, "Working with the Polls Task Flows"

---

**Permissions:** To perform the tasks in this chapter, you need the portal-level permission Manage Security and Configuration or Manage Configuration. A portal moderator has this permission by default.

To add the Polls task flows to a page, you need the portal-level permission Basic Services: Edit Page Access, Structure, and Content (simple permissions) or Create, Edit, and Delete Pages (advanced permissions).

For more information about permissions, see Section 29.1, "About Roles and Permissions for a Portal."

---

### 52.1 Prerequisite for Working with Polls

For polls to work in a portal, the portal moderator anyone with Manage Security and Configuration or Manage Configuration permission has to perform the following task:

- Add a polls task flow to a page in the portal, as described in Section 52.3, "Adding a Polls Task Flow to a Page."

**Note:** For information about working with polls, see Section 52.5, "Working with the Polls Task Flows."
52.2 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 Section 52.5.1, "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 Section 52.5.2, "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 Section 52.5.3, "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 Section 52.5.4, "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 (see Section 52.5.1, "Creating a Quick Poll Task Flow"), or use the Polls Manager to create more detailed polls (see Section 52.5.3.1, "Creating a Poll").

- 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.
  
  See Section 52.5.3.2, "Editing a Poll," Section 52.5.3.3, "Deleting a Poll," and Section 52.5.3.4, "Closing a Poll."

- Take a specific or the most recently-published poll (see the "Working with Polls" chapter in Using Oracle WebCenter Portal).

- View poll results. See Section 52.5.4, "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.

Polls are integrated with instant messaging and presence in the Polls Manager. Figure 52–1 shows a sample quick poll.
Adding a Polls Task Flow to a Page

52.3 Adding a Polls Task Flow to a Page

More detailed poll functionality is available through the Polls Manager (Figure 52–2). For more information, see Section 52.5.3, “Working with the Polls Manager Task Flow.”

Figure 52–2 Polls Manager

Polls created through the Polls Manager must be published and open to be taken. Users cannot take unpublished or closed polls.

Tip: 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.

For more information about the polls task flows, see Section 52.2, “About Polls.”

The Polls task flow you select is displayed on your page. Figure 52–3 shows the Quick Poll task flow.
Users with Edit privileges can access the task flow’s Component Properties dialog in Composer. For information about configuring a polls task flow, see Section 52.4, "Setting Polls Task Flow Properties."

52.4 Setting Polls Task Flow Properties

The polls task flows have associated properties, which users with sufficient privileges can access through the Component Properties dialog in Composer (Figure 52–4).

For information about accessing the Component Properties dialog, see Section 14.3, "Modifying Component Properties."

The following sections provide information about properties of the polls task flows and describe the properties on the Parameters tab.

- Section 52.4.1, "About the Polls Task Flow Properties"
- Section 52.4.2, "Polls Task Flow Parameters"

52.4.1 About the Polls Task Flow Properties

The properties on the Parameters tab of the Component Properties dialog control the default task flow content. For descriptions of the parameters on this tab, see Section 52.4.2, "Polls Task Flow Parameters." For some task flows, parameters on this tab facilitate the wiring of the task flow to page parameters and page definition variables. For more information, see Chapter 19, "Wiring Pages, Task Flows, Portlets, and ADF Components."

Changes to the properties on the Display Options, Style, and Content Style tabs affect the appearance and behavior of the task flow for all users. These properties are common to all task flows. For more information, see Section 14.3, "Modifying Component Properties."
The content of the **Events** tab depends on the events supported by the task flow. For more information, see Section 14.3.7, "Working with Component Contextual Events."

The **Child Components** tab displays all of the components contained within the current component. It provides controls for rearranging, showing, and hiding child components. Not all components contain children. So you may find this tab devoid of content. For more information, see Section 14.3.5, "Working with Child Components."

All properties on the **Parameters** and **Display Options** tabs provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the ↓ icon next to a property, then select **Expression Builder** to open the editor.

---

**Note:** When you enter EL on the generic **Display Options** tab in the Component Properties 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 14–1, "Display Options Properties".

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

---

If you need EL assistance, an application developer can provide an EL expression; see the "Expression Language Expressions" appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

### 52.4.2 Polls Task Flow Parameters

**Table 52–1** describes the parameters that are unique to the polls task flows.

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Polls Task Flow Parameters</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scope</td>
<td>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.</td>
</tr>
</tbody>
</table>
Working with the Polls Task Flows

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Show User Data Only</td>
<td>Specifies whether to display all polls or only those created by the current user:</td>
</tr>
<tr>
<td></td>
<td>■ Select No (default) to display all polls.</td>
</tr>
<tr>
<td></td>
<td>■ Select Yes to display only those polls created by the user</td>
</tr>
<tr>
<td></td>
<td>If the scope parameter is specified, then this parameter works the same but within only that scope.</td>
</tr>
<tr>
<td></td>
<td>This parameter appears in the properties for the Polls Manager task flow.</td>
</tr>
<tr>
<td>Poll Id</td>
<td>The name of the poll to display, available from the drop-down list.</td>
</tr>
<tr>
<td></td>
<td>This parameter appears in the properties for the following task flows:</td>
</tr>
<tr>
<td></td>
<td>■ Take Polls</td>
</tr>
<tr>
<td></td>
<td>■ View Poll Results</td>
</tr>
<tr>
<td>Show In Edit Mode</td>
<td>Specifies whether users can edit a quick poll:</td>
</tr>
<tr>
<td></td>
<td>■ 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</td>
</tr>
<tr>
<td></td>
<td>■ Select Yes to display the Design Poll button appears in both view and edit modes, so users can edit the quick poll.</td>
</tr>
<tr>
<td></td>
<td>This parameter appears in the properties for the Quick Poll task flow.</td>
</tr>
</tbody>
</table>

52.5 Working with the Polls Task Flows

The polls task flows let you create and manage polls.

Note: For information about taking polls, see the "Working with Polls" chapter in Using Oracle WebCenter Portal.

This section includes the following subsections:

■ Section 52.5.1, "Creating a Quick Poll Task Flow"
■ Section 52.5.2, "Working with the Take Polls Task Flow"
■ Section 52.5.3, "Working with the Polls Manager Task Flow"
■ Section 52.5.4, "Working with the View Poll Results Task Flow"

52.5.1 Creating a Quick Poll Task Flow

Quick Poll allow one-question polls to be published immediately. Each quick poll needs its own Quick Poll task flow on the page.

Note: To add the Quick Poll task flow, see Section 52.3, "Adding a Polls Task Flow to a Page."

To create a quick poll:

1. From the Quick Poll task flow, click Design Poll (Figure 52–5).
Note: The Design Poll button 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. For more information, see Section 52.4, “Setting Polls Task Flow Properties.”

Figure 52–5  Quick Poll Task Flow

The Edit Poll dialog opens (Figure 52–6).

2. On the General tab (Figure 52–6), 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.

Figure 52–6  Quick Poll - Edit Poll Dialog (General tab)

3. Click the Question tab (Figure 52–7), then design your one-question poll.
1. Make a selection from the 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).

2. Enter your question in the Question field.

3. Enter the answer selections in the answer field. For a multiple choice question, enter each answer choice in a separate line.

4. Optionally, select the Add Comment Field box to add a custom field, such as Tell us more! or Other or Please Explain.

5. Select the Require Answer to Question check box if you want to make the question mandatory, requiring users to answer the question.

6. Click OK.

**Note:** The same types of questions are available in Quick Poll and in the Polls Manager.

*Figure 52–8* 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 (Figure 52–12).

Quick polls can be managed in the following ways:

- From the Polls Manager (see Section 52.5.3.2, "Editing a Poll")
- From the Quick Poll task flow in Composer (in Edit Page mode), click the Design Poll button to edit the quick poll).

---

Note: To prevent participants from editing a Quick Poll, in Composer, click the Edit icon and open the Component Properties dialog. Select No for the Show in Edit Mode parameter. For more information, see Section 52.4, “Setting Polls Task Flow Properties.”

- To select which Quick Poll to view, from the Quick Poll task flow in Composer, click the Edit icon to open the Component Properties dialog. Select the poll to view from the Poll Id field (see also, Section 52.5.4, "Working with the View Poll Results Task Flow").

52.5.2 Working with the Take Polls Task Flow

The Take Polls task flow (Figure 52–11) displays the most recently-published available poll, unless it is set to display a specific poll with the Poll Id parameter.

---

Note: To add the Take Polls task flow, see Section 52.3, "Adding a Polls Task Flow to a Page."

After a user submits a response for that poll, this task flow displays the next most recently-published poll.

See Also: Section 52.4.2, "Polls Task Flow Parameters"

To configure the Take Polls task flow:

1. After you add the Take Polls task flow to the page, in Composer, click the Edit icon (wrench), as shown in Figure 52–9.
Working with the Polls Task Flows

**Figure 52–9  Take Polls Task Flow in Composer**

![Take Polls Task Flow in Composer](image1)

The Component Properties dialog opens (Figure 52–10).

**Figure 52–10  Take Polls Component Properties Dialog**

![Take Polls Component Properties Dialog](image2)

2. From the Poll Id drop-down list, select the poll you want users to take (Figure 52–10).

3. Click OK.

   The poll you selected appears in the Take Polls task flow (Figure 52–11).

**Figure 52–11  Take Polls**

![Take Polls](image3)
52.5.3 Working with the Polls Manager Task Flow

The Polls Manager (Figure 52–12) 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 Section 13.15, "Setting Page Security."
- 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. See Chapter 23, "Working with Resource Catalogs."

Figure 52–12 Polls Manager Task Flow

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.

This section contains the following subsections:

- Section 52.5.3.1, "Creating a Poll"
- Section 52.5.3.2, "Editing a Poll"
- Section 52.5.3.3, "Deleting a Poll"
- Section 52.5.3.4, "Closing a Poll"
- Section 52.5.3.5, "Analyzing the Results of a Poll"
52.5.3.1 Creating a Poll

1. From the Poll Manager task flow, click Create Poll (Figure 52-13).

   **Figure 52–13  Polls Manager - Create Poll**

   ![Create Poll](image)

2. In the Create Poll dialog that opens, enter the name of the poll and optionally a brief description (Figure 52–14).

   **Figure 52–14  Polls Manager - Create Poll**

   ![Create Poll](image)

   The Design page opens.

3. On the Design page, click Add and then make a selection to populate the poll with an existing template or with questions and surrounding text (Figure 52–15).

   To apply a template, you must have an existing template saved. When you save any poll, you can select to save it as a template. After it is saved as a template, you later apply that poll template to other polls.

   **Figure 52–15  Polls Manager - Design Page**

   ![Design Page](image)

4. Click Add Section to enter any explanatory text or to split your poll into sections (Figure 52–15).

   The Create Section dialog opens (Figure 52–16).

   1. Enter your desired text.
   2. Apply formatting by selecting options from the rich text editor controls.
   3. Click OK.
5. Click Add Question to add each poll question (Figure 52–15).

If you want to add questions to the section, click Add Question in the section. If you want to add a question that will not be within the section, click Add Question at the top of the Design page.

**Tip:** New questions are added to top of the poll, so you may want to enter poll questions in reverse order.

The Create Question dialog opens (Figure 52–17).

**Figure 52–17  Polls Manager - Create Question Dialog**

1. Make a selection from the Select a Type of Question drop-down list.

   Your selection determines the answer choices the user sees, for example, Multiple Choice (Only One Answer) or Multiple Choice (Multiple Answers).

2. Enter your question in the Question field.

   For a multiple choice question, enter each answer choice in a separate line.

3. Enter the answer selections in the answer field.

4. Select the Add Comment Field box to add a custom field, such as Tell us more! or Other.

5. Click OK.
An example of a prepopulated dialog is shown in Figure 52–18.

Figure 52–18 Create Question Dialog with Sample Question and Answer

A sample section with a question is shown in Figure 52–19.

Figure 52–19 Design Poll with a Section and a Question

6. Add more questions to the poll or a section, as described in the preceding steps.

7. Click Schedule to select publish and close options for the poll (Figure 52–20).

Polls must be published and open to be taken. Users cannot take unpublished or closed polls.
1. Make a selection from Publish Options.
   Select to keep the poll in draft mode for further editing, publish it immediately, or publish it on a future date.
   If you select to publish it on a future date, click the Select Date and Time icon to enter the publishing time through a calendar.
   Click Edit Introduction Message to customize the text provided at the beginning of the poll in the rich text editor.

2. Make a selection from Close Options.
   Select to close the published poll after it reaches a certain number of responses or on a certain date. If you select both options, then the poll closes when either condition is first met.
   If you select to close the poll on a specific date, click the Select Date and Time icon to enter the closing time through a calendar.
   Click Edit Closing Message to customize the text provided at the end of the poll in the rich text editor.

3. Click OK.

4. Click Save to save your schedule.

8. Click Settings to select what to display after users take the poll. (Figure 52–21)
   For example, you can set a custom URL or JSF task flow as a Thank You page that appears after the poll is taken.
From **After taking the Poll**, select one of the following options:

- **Show Closing Message as 'Thank You' message or Show Poll Results**
  
  If you select **Show Poll Results**, select to **Show Graph in either 2D Graph or 3D Graph**.

- **Use Custom URL as 'Thank You' page**
  
  Enter the URL of the page you want to show after the user takes the poll.
  
  The URL can be any URL, either the URL of a portal page, or an external URL.
  
  When you create a page in a portal, you can specify the pretty URL of that page here (for example, 
  
  http://<host>:<port>/webcenter/portal/<portalname>/pages/<pagename>

- **Use Custom Task Flow as 'Thank You' page**
  
  Copy the metadata file location of the custom task flow you want to show after the user takes the poll. You can view the metadata file location from the Task Flows page of the Assets pages, as described in **Section 20.5.1, "Viewing Information About an Asset."** For more information about the available options for task flows, see **Section 27.3.8, "Managing Task Flows."**
  
  To create a custom task flow, see **Section 27.3.3, "Creating a Task Flow to Visualize Data,‖** and make sure that the task flow is available (as described in **Section 20.5.3, "Showing and Hiding Assets‖**).
  
  **9.** Click **Analyze** to view results after users have taken the poll (Figure 52–22).
  
  For more information, see **Section 52.5.3.5, "Analyzing the Results of a Poll.‖"
10. Click Save to save your poll (Figure 52–23).

Figure 52–23  Saving a Poll

When you save any poll, you can select to save it as a template. After it is saved as a template, you can later apply that poll template to other polls.

Figure 52–24 shows your poll after it is published on a portal page. For users to view and take polls, add the Take Polls task flow to a page. See Section 52.5.2, "Working with the Take Polls Task Flow."

Figure 52–24  Poll Shown in the Take Polls Task Flow

52.5.3.2 Editing a Poll

You can edit a poll from the Polls Manager task flow on a portal page or from the page editor, Composer (see Figure 52–25).

To edit a poll:

1. Click the poll name link to edit the poll name and description.

2. Click the Actions menu and then select Design to make any changes.

See Section 52.5.3.1, "Creating a Poll" for more information.
3. Click **Save** and then **Close**.

### 52.5.3.3 Deleting a Poll
You can delete a poll from the Polls Manager task flow on a portal page or from the page editor, Composer (see **Figure 52–26**).

To delete a poll:

1. Click the **Actions** menu and select **Delete**.

![Delete Option for a Poll](image)

2. Click **Yes** in the Delete Poll dialog.

3. Click **Save** and then **Close**.

### 52.5.3.4 Closing a Poll
You can close a poll from the Polls Manager task flow on a portal page or from the page editor, Composer (see **Figure 52–27**).

To close a poll:

1. Click the **Actions** menu and select **Close**.

   The Close option is available only after a poll is published.
The Status of the poll changes to Closed, showing the date and time the poll closed.

**Tip:** Click the Actions menu and select Publish if you want to open the poll again.

2. Click Save and then Close.

### 52.5.3.5 Analyzing the Results of a Poll

You can analyze the results for a poll from the Polls Manager task flow on a portal page or from the page editor, Composer.

To analyze a poll:

1. Click the Actions menu and select Analyze (Figure 52–28).

The Analyze page opens (Figure 52–29).
2. If the poll included a field for poll takers to add comments, click **View Summary** to see consolidated comments.

The Response Summary dialog opens (Figure 52–30).

Expand the name of the poll’s custom field name to view all comments, if you gave poll respondents an option to add comments.
52.5.4 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. For more information, see Section 52.4, "Setting Polls Task Flow Properties."

**Note:** To add the View Poll Results task flow, see Section 52.3, "Adding a Polls Task Flow to a Page."

To view poll results:

1. After you add the View Poll Results task flow to the page, in Composer, click the Edit icon (wrench), as shown in Figure 52–31.

2. From the Poll Id drop-down list, select the poll you want to view (Figure 52–32).

3. Click OK.

Notice that the poll you selected appears in the task flow, showing the results of the poll.
Figure 52–33  View Poll Results Task Flow
Adding Profiles to a Portal

This chapter describes how to add Profile task flows to a portal. A Profile is a collection of useful data about a user, including the user's contact information, photo, location within the company hierarchy, and so on. The social networking capabilities in WebCenter Portal enable users to view and manage their own Profiles and to view the Profiles of others.

This chapter includes the following topics:

- Section 53.1, "About Profiles"
- Section 53.2, "Adding a Profile Task Flow to a Page"
- Section 53.3, "Setting Profile Task Flow Properties"
- Section 53.4, "Working with Profile Task Flows"

Permissions: To perform the tasks in this chapter, you need the portal-level permission Basic Services: Edit Page Access and Structure (standard permissions) or Pages: Edit Pages (advanced permissions). A portal moderator has this permission by default.

For more information about permissions, see Section 29.1, "About Roles and Permissions for a Portal."

53.1 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 the “Synchronizing Profiles with the Identity Store” section 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 the "Configuring Profile" section in Administering Oracle WebCenter Portal.
About Profiles

Notes:

- The Profile user interface was updated in 11g Release 1 (11.1.1.9.0). Depending on how your system administrator configured your installation of WebCenter Portal, you might see the legacy Profile user interface. For information on the legacy Profile user interface, see the "Managing Your Profile" chapter in the User’s Guide for Oracle WebCenter Portal: Spaces for 11g 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 the "Managing Your Profile" chapter in Using 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](image)

Notes:

- Empty fields (fields without any content) do not appear in some profile views.
See Also: For information about enabling a hierarchical view of your organization, as depicted in Figure 53–1, see the "Specifying a Management Chain for Organization View" section 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)
Adding a Profile Task Flow to a Page

Profile task flows have associated properties that you can use to control the appearance and behavior of a task flow instance. For example, you can use Profile properties to specify that the statements you enter into a Publisher task flow (see Section 49.1, “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:** Section 53.3, "Setting Profile Task Flow Properties"

### 53.2 Adding a Profile Task Flow to a Page

For the steps to add a Profile task flow to a page, see Section 12.4.7, "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 Portal Catalog, the Profile task flows are included under the Social and Communication folder.

53.3 Setting Profile Task Flow Properties

Profile task flows have associated properties, which users with sufficient privileges can access through the Component Properties dialog in Composer (Figure 53–5).

Figure 53–5 Profile Task Flow Component Properties Dialog

See Also: Section 14.3.2, "Setting Properties on a Component"

The following sections provide information about properties associated with Profile task flows and describe the properties available on the Parameters tab:

- Section 53.3.1, "About Profile Task Flow Properties"
- Section 53.3.2, "Organization View Task Flow Parameters"
- Section 53.3.3, "Profile Task Flow Parameters"
- Section 53.3.4, "Profile Gallery Task Flow Parameters"
- Section 53.3.5, "Profile - Snapshot Task Flow Parameters"
- Section 53.3.6, "Using Properties to Configure a Profile Task Flow Instance"
53.3.1 About Profile Task Flow Properties

When you set property values on a Profile task flow, you are affecting only the task flow instance on which the value is set. Other instances of the same task flow are not affected by such changes.

The properties on the Parameters tab of the Component Properties dialog can affect the default task flow content. For descriptions of the parameters on this tab, see:

- Section 53.3.2, "Organization View Task Flow Parameters."
- Section 53.3.3, "Profile Task Flow Parameters."
- Section 53.3.4, "Profile Gallery Task Flow Parameters."
- Section 53.3.5, "Profile - Snapshot Task Flow Parameters."

For some task flows, parameters on this tab facilitate the wiring of the task flow to page parameters and page definition variables. For more information, see Chapter 19, "Wiring Pages, Task Flows, Portlets, and ADF Components."

Changes to the properties on the Display Options, Style, and Content Style tabs affect the appearance and behavior of the task flow. These properties are common to all task flows. For more information, see Section 14.3.4, "Working with Component Display Options" and Section 14.3.6, "Working with Style and Content Style Properties."

The content of the Events tab depends on the events supported by the task flow. For more information, see Section 14.3.7, "Working with Component Contextual Events."

All properties on the Parameters and Display Options tabs provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the ➔ icon next to a property, then select Expression Builder to open the editor.

---

**Note:** When you enter EL on the generic Display Options tab in the Component Properties 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 14–1, "Display Options Properties".

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

---

If you need EL assistance, an application developer can provide an EL expression; see the "Expression Language Expressions" appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

53.3.2 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

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Control Panel Shown</td>
<td>Determines whether the task flow displays a control panel for manipulating</td>
</tr>
<tr>
<td></td>
<td>the style, alignment, and size of the content</td>
</tr>
<tr>
<td></td>
<td>Select to show the control panel, deselect to hide the control panel. The</td>
</tr>
<tr>
<td></td>
<td>control panel is hidden by default.</td>
</tr>
<tr>
<td>User Id</td>
<td>The ID of the user to display in the task flow</td>
</tr>
</tbody>
</table>
|                         | 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 the “Expression Language Expressions” appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

### 53.3.3 Profile Task Flow Parameters

Table 53–2 describes the parameters that are unique to the Profile task flow.

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Edit Mode</td>
<td>Determines whether to display Profile details as editable without requiring specific navigation to an editable view</td>
</tr>
<tr>
<td></td>
<td>■ Enter #{true} to always show Profile details in edit mode.</td>
</tr>
<tr>
<td></td>
<td>■ Enter #{false} to show Profile details as read-only.</td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
<tr>
<td>Profile ID</td>
<td>The ID of the user to display in the task flow</td>
</tr>
<tr>
<td></td>
<td>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 the “Expression Language Expressions” appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.</td>
</tr>
<tr>
<td>Section-Wise Edit Enabled</td>
<td>Determines whether to display section-by-section edit capability in the task flow</td>
</tr>
<tr>
<td></td>
<td>■ Enter #{true} to enable section-by-section editing. An Edit link is shown on each editable Profile section.</td>
</tr>
<tr>
<td></td>
<td>■ Enter #{false} to disable section-by-section editing. One Edit button is shown for the whole task flow.</td>
</tr>
<tr>
<td></td>
<td>This parameter is set to #{true} by default.</td>
</tr>
</tbody>
</table>

### 53.3.4 Profile Gallery Task Flow Parameters

Table 53–3 describes the parameters that are unique to the Profile Gallery task flow.
Setting Profile Task Flow Properties

Table 53–3  Profile Gallery Task Flow Parameters

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resource Id</td>
<td>The ID of the user to display in the task flow</td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td>If you need EL assistance, an application developer can provide an EL expression; see the &quot;Expression Language Expressions&quot; appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.</td>
</tr>
</tbody>
</table>

53.3.5 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

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allow photo upload</td>
<td>Determines whether the task flow displays controls that enable users to upload, clear and refresh a profile photo</td>
</tr>
<tr>
<td></td>
<td>Select to show profile photo controls, deselect to hide profile photo controls. The profile photo controls are hidden by default.</td>
</tr>
<tr>
<td>Allow status update</td>
<td>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</td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td>If status updates are enabled, users can enter updates through an embedded Publisher task flow. For information about the Publisher task flow, see the &quot;Liking, Commenting On, and Sharing Items in WebCenter Portal&quot; chapter in Using Oracle WebCenter Portal.</td>
</tr>
<tr>
<td>Image Size</td>
<td>Determines the size of the Profile photo displayed in the task flow</td>
</tr>
<tr>
<td></td>
<td>Values can be one of: ORIGINAL, LARGE, MEDIUM, SMALL. The default size is MEDIUM.</td>
</tr>
</tbody>
</table>
53.3.6 Using Properties to Configure a Profile Task Flow Instance

This section provides examples of how you use property values to affect the behavior of a given task flow instance. It includes the following subsections:

- Section 53.3.6.1, "Changing a Profile Photo in the Profile - Snapshot Task Flow"
- Section 53.3.6.2, "Posting a Status Update"
- Section 53.3.6.3, "Exposing Additional Controls in Organization View"
- Section 53.3.6.4, "Enabling Continuous Edits to Profile Details"
- Section 53.3.6.5, "Setting the Size of Profile Images in the Profile - Snapshot Task Flow"
- Section 53.3.6.6, "Exposing Navigational Breadcrumbs in Profile - Snapshot"
- Section 53.3.6.7, "Enabling Section-By-Section Profile Editing"

53.3.6.1 Changing a Profile Photo in the 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 53–6).

Table 53–4 (Cont.) Profile - Snapshot Task Flow Parameters

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Org Bread Crumbs Shown</td>
<td>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.</td>
</tr>
<tr>
<td>Profile Edit Link Shown</td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
<tr>
<td>User Name</td>
<td>The ID of the user to display in the task flow</td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td>If you need EL assistance, an application developer can provide an EL expression; see the “Expression Language Expressions” appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.</td>
</tr>
</tbody>
</table>
To enable users to change their Profile photo in the Profile - Snapshot task flow:

1. Open the Component Properties dialog for the Profile - Snapshot task flow instance you want to configure.

   **See Also:** Section 14.3.2, "Setting Properties on a Component"

2. In the Component Properties dialog, on the Parameters tab, select **Allow photo upload**.

   **Note:** To prevent users from changing their profile photos, deselect **Allow photo upload**.

3. When you finish revising component properties, click **OK**.

4. Save your changes, and exit the page editor.

### 53.3.6.2 Posting 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 53–7).

**Figure 53–7 Publisher Features in Profile - Snapshot Task Flow**

- Photos uploaded to Profile - Snapshot are persisted to all other Profile task flows that expose a photo.

- Note: Photos uploaded to Profile - Snapshot are persisted to all other Profile task flows that expose a photo.
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. Open the Component Properties dialog for the Profile - Snapshot task flow instance you want to configure.

   See Also: Section 14.3.2, "Setting Properties on a Component"

2. In the Component Properties dialog, on the Parameters tab, 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 properties, click OK.

4. Save your changes, and exit the page editor.

53.3.6.3 Exposing Additional Controls in Organization View

The Organization View task flow provides additional controls for manipulating your view of task flow content (Figure 53–8).
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. Open the Component Properties dialog for the Organization View task flow instance you want to configure.

   See Also: Section 14.3.2, "Setting Properties on a Component"

2. In the Component Properties dialog, on the Parameters tab, select Control Panel Shown.

   Note: To hide the Organization View control panel, deselect Control Panel Shown.

3. When you finish revising component properties, click OK.

4. Save your changes, and exit the page editor.

53.3.6.4 Enabling 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.
To enable continuous edits of Profile details:

1. Open the Component Properties dialog for the Profile task flow instance you want to configure.

   **See Also:** Section 14.3.2, “Setting Properties on a Component”

2. In the Component Properties dialog, on the **Parameters** tab, 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 properties, click **OK**.

4. Save your changes, and exit the page editor.

53.3.6.5 Setting the Size of Profile Images in the Profile - Snapshot Task Flow

Use the property **Image Size** to specify the display size of images that are uploaded through a Profile - Snapshot task flow. The value you enter affects the size of the photo in only the given task flow instance. No other types of Profile task flows and no other task flow instances are affected.

To set the size of a Profile image in the Profile - Snapshot task flow:

1. Open the Component Properties dialog for the Profile - Snapshot task flow instance you want to configure.

   **See Also:** Section 14.3.2, “Setting Properties on a Component”

2. In the Component Properties dialog, on the **Parameters** tab, enter a value in the **Image Size** box:
   - **ORIGINAL** (*Figure 53–9*)
   - **SMALL** (*Figure 53–10*)

   **Figure 53–9  Image Size Set to ORIGINAL**

   ![Profile - Snapshot](image)
   - Karen Walker
   - Knowledge Worker, Sales
   - I'm so excited for the stamp show!
   - What's on your mind?
   - Attach: File | Link | Share something: Publish

   **Figure 53–10  Image Size Set to SMALL**
3. When you finish revising component properties, click **OK**.

4. Save your changes, and exit the page editor.

**53.3.6.6 Exposing Navigational Breadcrumbs in Profile - Snapshot**

Use the property **Org Bread Cumbs Shown** to enable the display of breadcrumbs that visualize the current user's position in the organization hierarchy (Figure 53–13).
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. Open the Component Properties dialog for the Profile - Snapshot task flow instance you want to configure.

   See Also: Section 14.3.2, "Setting Properties on a Component"

2. In the Component Properties dialog, on the Parameters tab, select Org Bread Crumbs Shown.

   Note: To hide hierarchical breadcrumbs, deselect Org Bread Crumbs Shown.

3. When you finish revising component properties, click OK.

4. Save your changes, and exit the page editor.

53.3.6.7 Enabling Section-By-Section Profile Editing

Use the Section-Wise Edit Enabled property to specify whether section-by-section editing is enabled, exposing Edit buttons on each editable section of a Profile task flow instance (Figure 53–14), or disabled, exposing only a single Edit button for the entire Profile (Figure 53–15).
Figure 53-14  Section-By-Section Profile Editing

Karen Walker
Knowledge Worker, Sales
I'm so excited for the stamp show!

What's on your mind?

Attach: File | Link  Share something: Publish

Profile

Summary

About Me  I am an avid stamp collector.
Display Name  Karen Walker
Email  karen@example.com
Department  Sales
Designation  Knowledge Worker
Manager  Noah Garcia
Phone  650-555-5555
Time Zone  (UTC-08:00) Los Angeles - Pacific Time (PT)

Employee

Employee Type  FullTime
Employee Number  ORAk9DZ5
Preferred Language  US-English
Organization  Oracle

Business Contact

Personal Information

Date of Hire  20120101151052.593
To enable section-by-section editing in a Profile task flow instance:

1. Open the Component Properties dialog for the Profile task flow instance you want to configure.

   **See Also:** Section 14.3.2, "Setting Properties on a Component"

2. In the Component Properties dialog, on the Parameters tab, 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 properties, click OK.

4. Save your changes, and exit the page editor.
53.4 Working with Profile Task Flows

For information about how users work with Profile task flows, see the "Managing Your Profile" chapter in Using Oracle WebCenter Portal.
Adding RSS Feeds to a Portal

This chapter describes how to use RSS (Really Simple Syndication) feeds in a portal. RSS provides the ability to publish content from WebCenter Portal as news feeds in RSS 2.0 and Atom 1.0 formats. News feeds deliver content update information to your favorite RSS or Atom reader. In addition, RSS enables you to view news feeds from external sources on your portal pages in an RSS Viewer.

This chapter includes the following topics:

- Section 54.1, "Prerequisites for RSS News Feeds"
- Section 54.2, "About RSS News Feeds"
- Section 54.3, "Adding an RSS Task Flow to a Page"
- Section 54.4, "Setting RSS Task Flow Properties"
- Section 54.5, "Working with RSS Task Flows"

Permissions: To perform the tasks in this chapter, you need the portal-level permission Manage Security and Configuration or Manage Configuration. A portal moderator has this permission by default.

To add the RSS task flow to a page and to edit the feed location, you need the portal-level permission Basic Services: Edit Page Access, Structure, and Content (simple permissions) or Create, Edit, and Delete Pages (advanced permissions).

A portal moderator has these permission by default.

For more information about portal-level permissions, see Section 29.1, "About Roles and Permissions for a Portal."

54.1 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 the “Managing RSS” chapter in Administering Oracle WebCenter Portal.

For RSS to work in a portal, the portal moderator 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 Section 7.2.7, "Enabling or Disabling RSS News Feeds for a Portal."
Add the RSS task flow to a page in the portal, as described in Section 54.3, "Adding an RSS Task Flow to a Page."

Edit the feed location, as described in Section 54.5.1, "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 Section 54.5, "Working with RSS Task Flows."

---

### 54.2 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 the "About RSS" and "Obtaining Tool News Feeds" sections in Using 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 the "RSS Manager" section in Using 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 Section 40.2.1, "RSS Task Flow" and the "Obtaining Tool News Feeds" section in Using 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.

---

### 54.2.1 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**

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Global Methods (03-#R-13) Oracle Unified Method (OUM) eFAST v3.0.0 and Cloud Application Services Implementation Approach Solution Delivery Guide
The Oracle Unified Method (OUM) (Estimating Framework and Accelerated Sales Tool V3.0.0 (OUM-eFAST)) and OUM Cloud Application Services Implementation Approach Solution Delivery Guide were developed in partnership with subject matter experts in EMEA and NA. OUM-eFAST produces an estimate, timeline, and statement of work (SOW) / contract for Oracle Application Services offerings. The OUM Cloud Application Services Implementation Approach to Oracle’s lightweight approach for implementing Fusion Applications running on a cloud infrastructure.

Global Methods (01-#R-12) Oracle Unified Method (OUM) PQSU’s Estimating Support for J.D. Edwards EnterpriseOne Engagements
The Oracle Unified Method (OUM) now provides estimating support for J.D. Edwards EnterpriseOne engagements. This support represents a major milestone in the evolution of OUM and enables J.D. Edwards EnterpriseOne practices to transition from the Compass Methodology to OUM.

The Oracle Unified Method (OUM) now provides estimating support for the Project Portfolio Management Global Business Unit’s (GBU) Primavera P6 Enterprise Project Portfolio Management and Primavera P6 Professional Project Management engagements. This support represents a major milestone in the evolution of OUM and enables Primavera P6 practices to transition from the Primavera implementation method (PIM) and PM # estimators to OUM.

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54-2 Oracle Fusion Middleware Building Portals with Oracle WebCenter Portal
You can add the RSS task flow to a page (see Section 54.3, "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 Section 54.5.1, "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 the "Managing RSS" chapter 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 the "Providing Login Information for External Applications" section in Using Oracle WebCenter Portal.

54.3 Adding an RSS Task Flow to a Page

You can incorporate news feeds from external sources into your portal pages by using the RSS task flow. You can add the RSS task flow from the resource catalog in Composer. 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 WebCenter Portal. 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 Section 14.2, "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 Portal 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 Section 54.5.1, "Editing the Feed Location of an RSS Task Flow."

54.4 Setting RSS Task Flow Properties

The RSS task flow has associated properties, which users with sufficient privileges can access through the Component Properties dialog in Composer (Figure 54–2).

Figure 54–2  RSS Task Flow Component Properties

For information about accessing the Component Properties dialog, see Section 14.3, "Modifying Component Properties."

The following sections provide information about properties of the RSS task flow and describe the properties on the Parameters tab:

- Section 54.4.1, "About the RSS Task Flow Properties"
- Section 54.4.2, "RSS Task Flow Parameters"

54.4.1 About the RSS Task Flow Properties

The properties on the Parameters tab of the Component Properties dialog control the default task flow content. For descriptions of the parameters on this tab, see Section 54.4.2, "RSS Task Flow Parameters." For some task flows, parameters on this tab facilitate the wiring of the task flow to page parameters and page definition variables. For more information, see Chapter 19, "Wiring Pages, Task Flows, Portlets, and ADF Components."
Changes to the properties on the **Display Options, Style, and Content Style** tabs affect the appearance and behavior of the task flow for all users. These properties are common to all task flows. See Section 54.5.2, "Deleting the RSS Task Flow" if you want users to have the option of deleting the task flow. For more information about these tabs, see Section 14.3, "Modifying Component Properties."

The contents of the **Events** tab depend on the events supported by the task flow. For more information, see Section 14.3.7, "Working with Component Contextual Events."

All properties on the **Parameters** and **Display Options** tabs provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the \( \downarrow \) icon next to a property, then select **Expression Builder** to open the editor.

---

**Note:** When you enter EL on the generic **Display Options** tab in the Component Properties 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 14–1, "Display Options Properties". EL validation is not performed on non-generic display options.

---

If you need EL assistance, an application developer can provide an EL expression; see the 'Expression Language Expressions' appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

### 54.4.2 RSS Task Flow Parameters

**Table 54–1** describes the parameters that are unique to the RSS task flow.

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>External Application ID</td>
<td>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 <strong>Administrator</strong> link at the bottom of WebCenter Portal.</td>
</tr>
<tr>
<td>RSS Feed URL</td>
<td>The URL to access the RSS feed. For example, to use the Oracle Press Releases RSS feed, enter: <a href="http://www.oracle.com/rss/rss_ocom_pr.xml">http://www.oracle.com/rss/rss_ocom_pr.xml</a></td>
</tr>
</tbody>
</table>

### 54.5 Working with RSS Task Flows

As the portal moderator, 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 contains the following subsections:

- Section 54.5.1, "Editing the Feed Location of an RSS Task Flow"
- Section 54.5.2, "Deleting the RSS Task Flow"
54.5.1 Editing the Feed Location of an RSS Task Flow

You can change the feed URL or the external application ID specified for an RSS task flow at any point of time.

To change the feed location of an RSS task flow:

1. Go to the web site that provides the RSS feed you want to view through the RSS viewer, and copy its RSS URL.
2. Log on to WebCenter Portal, and go the page that contains the RSS task flow you want to modify.
3. Edit the page.
4. Click the Edit icon (wrench icon) on the header of the RSS task flow.
5. In the Component Properties dialog, click the Parameters tab, if it is not open already. (Figure 54–3).

Figure 54–3  Specifying the Feed Location in the RSS Task Flow

6. In the RSS Feed URL field, paste the URL that you copied in step 1.
   For information about the RSS task flow parameters, see Section 54.4, "Setting RSS Task Flow Properties."
7. If the feed you want to publish requires authentication, in the External Application ID field, specify the name of the external application configured to store your login credentials for accessing that feed.
   See "Accessing External Applications" for information about external applications.
8. Click **Apply** to save your changes and continue editing, or click **OK** to save your changes and close the dialog.

Content from the external feed you specified is displayed within the RSS task flow.

9. Click **Save** at the top-right corner of Composer to save your changes and remain in Composer.

10. Optionally, click **View Portal** to exit Composer.

### 54.5.2 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 54–4).

**Figure 54–4  Remove Icon on an RSS Task Flow**

You can also allow users to remove the RSS component from a page by selecting the **Allow Remove** option from the Display Options tab of the Component Properties dialog (Figure 54–5).

**Figure 54–5  Exposing the Remove Option for an RSS View**
This chapter describes how to add and customize search in WebCenter Portal.

**Note:** This chapter describes tasks performed by an application specialist or portal moderator. Working with search at the application level is a system administrator task, as described in the "Managing Oracle Secure Enterprise Search in WebCenter Portal" chapter in *Administering Oracle WebCenter Portal*.

This chapter includes the following topics:

- Section 55.1, "About Searching in WebCenter Portal"
- Section 55.2, "Customizing Search with Oracle SES 11.2.2.2"
- Section 55.3, "Customizing Search with Oracle SES 11.1.2.x"
- Section 55.4, "Limitations with Search"

**Permissions:** To perform the tasks in this chapter, you must be a portal moderator or member with the permission Basic Services: Edit Page Access and Structure (simple permissions) or Pages: Edit Pages (advanced permissions).

For more information about permissions, see Section 29.1, "About Roles and Permissions for a Portal."

### 55.1 About Searching in WebCenter Portal

WebCenter Portal provides two ways of searching an application:


- Oracle Secure Enterprise Search (SES) adapter. See Section 55.1.2, "Understanding Search with Oracle SES."

In addition to the Oracle SES and the live 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. For more information, see the "Searching for Documents" section in *Using Oracle WebCenter Portal*. 
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). For more information, Section 30.5.1, "Searching for a User or Group in the Identity Store."

Figure 55–1  Find User Icon in a Mail Compose Window

55.1.1 Understanding Search with WebCenter Portal Live Search

Although Oracle SES is the preferred search platform for best performance, your system administrator can manually override search with Oracle SES and have applications search using WebCenter Portal’s live (delegated) search. WebCenter Portal’s live search adapters span all enabled and searchable components, such as documents, tags, people, and pages.

55.1.2 Understanding Search with Oracle SES

Oracle SES is set as the default and preferred search platform. In addition to providing better scalability and performance than WebCenter Portal’s live search, Oracle SES is beneficial for the following reasons:

- Oracle SES provides unified ranking results, with the most relevant items appearing first.
- Oracle SES provides more thorough search. For example, when searching lists, WebCenter Portal live search only searches list names and descriptions, while Oracle SES also searches list column names and column contents.
- Oracle SES allows search of repositories outside of WebCenter Portal. Oracle SES results appear in the same result set as WebCenter Portal’s search results.
- Oracle SES supports the search REST APIs and data control for customizing your search interface.

The Oracle SES adapter provides unified ranking results for the following resources:

- Documents, including wikis and blogs
- Announcements and discussions
- Portals, page metadata, lists and people resources

Note: The crawler that indexes portals, page metadata, lists, and people is not supported in Portal Framework applications.

When users run a search for a user name, most likely, they are looking for that person's contact information (that is, the exact user name in the profile), not necessarily documents that the user wrote. The unified ranking in Oracle SES enables you to see the most relevant results, across all different types of searches.

Additionally, with Oracle SES as the search engine, users can use the wildcard character [*] in the middle or end of a term for wildcard matching. For example, when you search for keywords like wiki or page, Oracle SES does not return the wiki page MyWikiPage in search results. However, My* or My*Page does return MyWikiPage.
Beginning with 11g Release 1 (11.1.1.8.0), WebCenter Portal supports Oracle SES 11.2.2.2, which provides faceted search. Facets count the full corpus and have better response time than the refiners used in earlier releases. When Oracle SES 11.2.2.2 is configured, WebCenter Portal uses faceted search by default (for information on overriding this, see Section 55.2, "Customizing Search with Oracle SES 11.2.2.2"). In addition to faceted search, Oracle SES 11.2.2.2 also supports document thumbnails.

For best performance and scalability, Oracle recommends you configure new instances of WebCenter Portal with Oracle SES 11.2.2.2. Table 55–1 summarizes the features and differences between Oracle SES 11.2.2.2 and 11.1.2.x.

You can see what search option your system administrator configured on the Tools and Services - Search page in portal administration. Figure 55–2 shows an instance with WebCenter Portal configured with Oracle SES release 11.2.2.2.
55.2 Customizing Search with Oracle SES 11.2.2.2

This section contains the following topics:

- Section 55.2.1, "Working with the Oracle SES 11.2.2.2 Search Task Flows"
- Section 55.2.2, "Reverting to Oracle SES 11.1.2.x Behavior"
- Section 55.2.3, "Configuring the Filtering Dropdown with Oracle SES 11.2.2.2"
- Section 55.2.4, "Changing the Search Box Search with Oracle SES 11.2.2.2"
- Section 55.2.5, "Configuring Search Scope with Oracle SES 11.2.2.2"
- Section 55.2.6, "Configuring Facets with Oracle SES 11.2.2.2"
- Section 55.2.7, "Enriching Search Results using Custom Attributes with Oracle SES 11.2.2.2"

55.2.1 Working with the Oracle SES 11.2.2.2 Search Task Flows

### Table 55–2 Search Task Flows with Oracle SES 11.2.2.2

<table>
<thead>
<tr>
<th>Task Flow</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search - Faceted Search</td>
<td>This task flow provides a rich search experience supporting faceted search, filtered search in the search box, and document thumbnails.</td>
</tr>
<tr>
<td>Search - Administration</td>
<td>This task flow allows access to the Tools and Services - Search administration page for customizing search settings.</td>
</tr>
</tbody>
</table>
Table 55–2 lists the search task flows supported with Oracle SES 11.2.2.2.

<table>
<thead>
<tr>
<th>Task Flow</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search - Toolbar</td>
<td>This task flow enables users to enter simple search criteria and run the search from the application. Search results are rendered by the Search - Faceted Search task flow. This task flow is the same as the Search component available in the Default Portal Catalog under Portal Components (see Section B.32, 'Search').</td>
</tr>
</tbody>
</table>

55.2.2 Reverting to Oracle SES 11.1.2.x Behavior

If the Tools and Services - Search administration page shows that your system is configured to use Oracle Secure Enterprise Search (SES) release 11.2.2.2, then you see the **Use new search task flow with facet support** check box selected by default.

You can clear this check box to have this portal use the Search - Non-Faceted Search task flow (which uses refiners instead of facets). If you do this, then the next time this page is accessed, the remaining settings on this page are grayed-out, and you must configure search settings with Search - Non-Faceted Search task flow parameters.

For best performance and scalability, as well as facet support and easier configuration, configure the application to use Oracle SES release 1.2.2.2 or later with the new Search - Faceted Search task flow. However, upgraded instances may choose to remain with the old Search - Non-Faceted Search task flow to retain certain functionality. (The functionality to save searches and set personal user preferences is not supported with Oracle SES 11.2.2.2.)

**See Also:** If you have upgraded from earlier WebCenter Portal/Oracle SES instances and you select to use the new search task flow with facet support, then previous search user preferences are overridden by the settings on the Search administration page. To retain your previous customizations, you must reset those customizations on the Search administration page.

55.2.3 Configuring the Filtering Dropdown with Oracle SES 11.2.2.2

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 dropdown. Filtering allows users to narrow their search results using a filter list in the search results or in the global search box. **Figure 55–3** shows the global search box with a full list of result types in the filtering dropdown.
Clear the Enable filtering dropdown check box to remove the filtering dropdown from the global search box. Figure 55–4 shows the global search box with no arrow for the filtering dropdown.

You can select which result types to include in the dropdown, as well as in the filter list to the left of search results and the order in which they display, by moving them back and forth between the Available Result Types and Included lists. For example, suppose you select to include people, documents, and announcements as shown in Figure 55–5.

The filtering dropdown and the filter list to the left of search results show only People, Documents, and Announcements listed in that order, as shown in Figure 55–6. Additionally, you do not see search results from other result types not selected, such as discussions. The “Everything” filter listed shows every result from people, documents, and announcements.
55.2.4 Changing the Search Box Search with Oracle SES 11.2.2.2

The Input Box Size section lets you increase or decrease the width of the search box on the page template. Use the slider to change the width (in columns) from the default value of 20.

Figure 55–7 Configuring Search Box Size

Input Box Size
Use the slider to set the width (in columns) of the search input box on the page template. Default value is 20.

55.2.5 Configuring Search Scope with Oracle SES 11.2.2.2

The Search Scope section lets you choose whether to show results either from only this portal or from all portals including the Home portals of all users.

55.2.6 Configuring Facets with Oracle SES 11.2.2.2

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.

You can change the order in which the facets display by moving them back and forth between the Available Facets and Included lists. For example, if you move Portal to the Available Facets list, then the Portal facet does not appear on the search results page.

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

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

**See Also:** "Managing Oracle Secure Enterprise Search in WebCenter Portal" section in *Administering Oracle WebCenter Portal* for information on administering facets in Oracle SES.

### 55.2.7 Enriching Search Results using Custom Attributes with Oracle SES 11.2.2.2

The Custom Attributes section lets you select which custom search attributes should appear in search results and the order in which they appear. When this **Tools and Services - Search** administration page is opened, WebCenter Portal makes a call to Oracle SES to fetch available *custom* (as opposed to *standard*) attributes.

Figure 55–8 shows the scenario where the **forumid** and **threadid** custom attributes were moved into the Included column, so they appear in search results.

![Configuring Custom Attributes](image)

**Figure 55–8 Configuring Custom Attributes**

- **Available Attributes**
  - measure1
  - Headline2
  - Headline3
  - Host
  - InfoSource
  - InfoSource Path
  - KEY
  - Keywords
  - Language
  - Minetype
  - Reference Text
  - seatHostname
  - Subject
  - summary
  - thread
  - urldepth
  - wr_DESCRIPTION
  - wr_expertIds
  - wr_keywords
  - xCloseRoleList
  - xCloseUserList
  - xContinue

- **Included**
  - forumid
  - threadid

Figure 55–9 shows search results that include the custom attributes **threadid** and **forumid**. (*Created by* and *Last modified on* are standard attributes.) An attribute displays only if there is a value for it.
For best performance and scalability, Oracle recommends that system administrators configure new instances of WebCenter Portal with Oracle SES 11.2.2.2. However, upgraded WebCenter Portal instances may choose to remain on Oracle SES 11.1.2.x to retain certain functionality. The task flows to save searches and set user preferences are not supported with Oracle SES 11.2.2.2.

This section contains the following topics:

- Section 55.3.1, "Working with the Oracle SES 11.1.2.x Search Task Flows"
- Section 55.3.2, "Narrowing the Scope of Search with Oracle SES 11.1.2.x"
- Section 55.3.3, "Customizing Search Results using Attributes and Refiners with Oracle SES 11.1.2.x"
- Section 55.3.4, "Setting Search Task Flow Properties with Oracle SES 11.1.2.x"
55.3.1 Working with the Oracle SES 11.1.2.x Search Task Flows

Table 55–3 lists the search task flows supported with Oracle SES 11.1.2.x.

<table>
<thead>
<tr>
<th>Task Flow</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search - Non-Faceted Search</td>
<td>This task flow provides a rich search experience with features for refining and saving search results. Note: This task flow is provided in environments where Oracle SES 11.1.2.x is configured.</td>
</tr>
<tr>
<td>Search - All Saved Searches</td>
<td>This task flow enables you to create a simple launch pad for running saved searches within the application.</td>
</tr>
<tr>
<td>Search - Preferences</td>
<td>This task flow enables users to select which WebCenter Portal tools and services to search.</td>
</tr>
<tr>
<td>Search - Toolbar</td>
<td>This task flow enables users to enter simple search criteria and run the search from the application. Search results are rendered by the Search - Faceted Search task flow. This task flow is the same as the Search component available in the Default Portal Catalog under Portal Components (see Section B.32, &quot;Search&quot;).</td>
</tr>
</tbody>
</table>

Note: Add tools and services to a page through the resource catalog. For complete information on how to do this, see Chapter 14, "Working with Resource Catalog Components on a Page."

55.3.2 Narrowing the Scope of Search with Oracle SES 11.2.x

With the search task flow parameters, you can restrict search results to include only specific tools and services, document types, and portals. This section describes how to set these parameters. It includes the following topics:

See Also: Section 55.3.4.2, "How to Set Parameters to Narrow Searches"

- Section 55.3.2.1, "Searching Specific Tools and Services"
- Section 55.3.2.2, "Searching Specific Document Types"
- Section 55.3.2.3, "Searching Specific Portals"

55.3.2.1 Searching Specific Tools and Services
You can restrict search results to one or more WebCenter Portal services with the Services to be Included parameter.

For example, to display only profiles and documents in the Content Server, set this parameter to oracle.webcenter.people, oracle.webcenter.doclib. If nothing is specified, then all tools and services are searched.

55.3.2.2 Searching Specific Document Types
You can restrict search results to one or more types of documents in the Oracle WebCenter Content Server (such as PDF, PPT, or DOC) with the Mimetype parameter.

Examples of common MIME type values are as follows:

- application/excel
Customizing Search with Oracle SES 11.1.2.x

- application/msword
- application/pdf
- application/powerpoint
- text/html
- text/plain

The MIME types can be any standard MIME type value, such as those available from Microsoft Office.

For example, to search only web pages and Microsoft Word documents, set the `Mimetype` parameter to `text/html,application/msword`. If nothing is specified, then all document types are searched.

To see a MIME type value for a document, in the Content Server, select the **Info** icon in the **Actions** column (Figure 55–10).

**Figure 55–10  Document Formats in the Content Server**

The format is listed in the **Formats** field, as shown in Figure 55–11.

**Figure 55–11  Document Format Value**

- **Profile:**
  - **Template Type:** [PersonalSpaces/monty/]
  - **Folder:**
  - **Hidden:** False
  - **Read Only:** False
  - **Inhibit Propagation:** False
  - **Force Folder Security:** True

- **Web Site Object Types:**
  - **Web Sites:**
  - **Exclude From Lists:**
  - **Web Site Sections:**
  - **Region Definitions:**

- **Tags:**

- **Page ID:**

- **Workflow Assignment:**

- **Workflow Approval User List:**

- **Security Group:** [PersonalSpaces]

- **Accounts:** [FEWebCenter/007a19f5527043c1-a256-903a6d40af]

- **Checked Out By:**

- **Status:** [Released]

- **Formats:** application/vnd.openxmlformats-officedocument.presentationml.presentation
55.3.2.3 Searching Specific Portals

WebCenter Portal search performs global (that is, application-wide) searches. However, you can restrict search results to one or more portals with the Search Scope parameter.

Set this parameter to the comma-separated list of GUIDs of the portals to search. If nothing is specified in this parameter, then all portals are searched.

For example:

#{spaceContext.currentSpaceGUID}
#{serviceCtx.scope.GUID}
#{spaceContext.space['Travel'].metadata.guid}

where Travel is the name of the portal.

To search the current portal as well as all subportals, enter the following:

#{spaceContext.currentSpace.subspaceGuids}

55.3 Customizing Search Results using Attributes and Refiners with Oracle SES 11.1.2.x

A set of standard attributes (such as author and size) is shown in each search result item. You can add additional attributes by specifying one or more attributes in the Custom Attributes parameter.
For example, Figure 55–12 shows search results with attributes added for DocumentName, DocumentType, FileName, DocumentID, and CreatedDate.

**Figure 55–12  Search Results Showing Custom Attributes**

An attribute is shown only if there is a value for it.

---

**Note:** All attributes must be added to the **Metadata List** parameter in the Content Server. For these attributes, the following list would need to be included in the **Metadata List** parameter:

```
DocumentName:dDocName, DocumentType:dDocType, FileName:dOrigin
alName, DocumentID:dID, CreatedOn:dDocCreatedDate
```

For more information, see the "Managing Oracle Secure Enterprise Search in WebCenter Portal" section in *Administering Oracle WebCenter Portal*.

---

Additionally, if you do not want users to see certain standard refiners in their search results, then set the **Refiners to hide** parameter to a list of one or more refiners you want hidden. For example, you might want to hide the portal refiner to give the appearance that no other portals exist.

The following predefined refiners can be hidden:

- Date
- Author
- Portal
- Service
- Tag

If nothing is specified, then all refiners are shown.
Customizing Search with Oracle SES 11.1.2.x

55.3.4 Setting Search Task Flow Properties with Oracle SES 11.1.2.x

The search task flows have associated properties, which users with sufficient privileges can access from the Component Properties dialog in Composer (Figure 55–13).

Figure 55–13 Search Task Flow Component Properties

For information about accessing the Component Properties dialog, see Section 14.3, "Modifying Component Properties."

The following topics provide information about properties of the search task flows and describe the properties on the Parameters tab.

- Section 55.3.4.1, "About the Search Task Flow Properties"
- Section 55.3.4.2, "How to Set Parameters to Narrow Searches"
- Section 55.3.4.3, "Search Task Flow Parameters"

55.3.4.1 About the Search Task Flow Properties

The properties on the Parameters tab of the Component Properties dialog control the default task flow content. For descriptions of the parameters on this tab, see Section 55.3.4.3, "Search Task Flow Parameters." For some task flows, parameters on this tab facilitate the wiring of the task flow to page parameters and page definition variables. For more information, see Chapter 19, "Wiring Pages, Task Flows, Portlets, and ADF Components."

Changes to the properties on the Display Options, Style, and Content Style tabs affect the appearance and behavior of the task flow for all users. These properties are common to all task flows. For more information, see Section 14.3, "Modifying Component Properties."
The content of the **Events** tab depends on the events supported by the task flow. For more information, see Section 14.3.7, "Working with Component Contextual Events."

The **Child Components** tab displays all of the components contained within the current component. It provides controls for rearranging, showing, and hiding child components. Not all components contain children. So this tab may be omitted. For more information, see Section 14.3.5, "Working with Child Components."

All properties on the **Parameters** and **Display Options** tabs provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the **Expression Builder** icon next to a property, then select **Expression Builder** to open the editor.

---

**Note:** When you enter EL on the generic **Display Options** tab in the Component Properties 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 14–1, "Display Options Properties".

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

---

If you need EL assistance, an application developer can provide an EL expression; see the "Expression Language Expressions" appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

### 55.3.4.2 How to Set Parameters to Narrow Searches

The parameters to scope your search results to specific portals, services, and document types are available in the Search - Non-Faceted Search task flow.

You can either can modify the portal’s page template to edit the Search - Non-Faceted Search task flow parameters, or the system administrator can add the Search - Non-Faceted Search task flow to the portal and edit its parameters.

- Section 55.3.4.2.1, "Editing the Search - Non-Faceted Search Task Flow in a Page Template"
- Section 55.3.4.2.2, "Editing the Search - Non-Faceted Search Task Flow in a Portal"

**See Also:** Section 55.3.2, "Narrowing the Scope of Search with Oracle SES 11.1.2.x"

### 55.3.4.2.1 Editing the Search - Non-Faceted Search Task Flow in a Page Template

To edit the page template:

1. In the portal administration (see Section 7.1, "Accessing Portal Administration"), click **Settings** in the left navigation pane (Figure 55–14).

   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`

**See Also:** Appendix A, "WebCenter Portal Pretty URLs"
2. Take note of the page template selected for your portal.

3. In the left navigation pane, click Assets, then Page Templates.

4. Select the page template used in your portal, and then from the Actions menu, select Copy (Figure 55–15).

5. Enter a name for this new template, and click OK (Figure 55–16).

6. Select the Available check box to make this page template available, and then click Edit.
7. In the page template, click + Add Content.

8. Select to add the Search - Non-Faceted Search task flow and click Edit to set its parameters (Figure 55–18). For more information on the parameters, see Section 55.3.4.3, “Search Task Flow Parameters.”

**Figure 55–18 Editing Search - Non-Faceted Search Task Flow Parameters Dialog**

<table>
<thead>
<tr>
<th>Target Options</th>
<th>Parameters</th>
</tr>
</thead>
<tbody>
<tr>
<td>Custom Attributes</td>
<td></td>
</tr>
<tr>
<td>Mime-type</td>
<td></td>
</tr>
<tr>
<td>Refiners to hide</td>
<td></td>
</tr>
<tr>
<td>Resource ID</td>
<td></td>
</tr>
<tr>
<td>Resource Scope</td>
<td></td>
</tr>
<tr>
<td>Resource Type</td>
<td></td>
</tr>
<tr>
<td>Search Scope</td>
<td></td>
</tr>
<tr>
<td>Services to be Excluded</td>
<td></td>
</tr>
<tr>
<td>Services to be Included</td>
<td></td>
</tr>
<tr>
<td>Show or hide input box</td>
<td></td>
</tr>
<tr>
<td>Use Popup Window</td>
<td></td>
</tr>
</tbody>
</table>

**Note:** When Oracle SES 11.2.2.2 is configured, the Parameters tab does not appear, because the Search administration page is used for customizations.
Customizing Search with Oracle SES 11.1.2.x

55.3.4.2.2 Editing the Search - Non-Faceted Search Task Flow in a Portal

The Search - Non-Faceted Search task flow is not available in the default resource catalog, so editing its task flow in a portal generally involves adding the Search - Non-Faceted Search task flow to the resource catalog, and then assigning this catalog to the portal. For example:

1. In the portal administration (see Section 7.1, "Accessing Portal Administration"), click Assets in the left navigation pane, then Resource Catalogs.

   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:  Appendix A, "WebCenter Portal Pretty URLs"

2. Either click Create to create a new resource catalog or select an existing resource catalog and click Edit.

3. Click Add, then Add from Library.

4. Select the Task Flows resource, expand Design Time, then scroll down to select the Search - Non-Faceted Search task flow, and click Add (Figure 55–19).

   Figure 55–19  Add Resource Catalog Item Dialog

- Note: Although the Search - Administration and Search - Faceted Search task flows appear in the list, they are available only for instances configured to use Oracle SES 11.2.2.2.

5. You see the Search - Non-Faceted Search task flow added to the resource catalog. Optionally, you can drag and drop the task flow into a folder. With the Search - Non-Faceted Search task flow selected, click Edit (pencil icon) (Figure 55–20).
6. On the Target tab, add a description (Figure 55–21).

7. On the Options tab, for New Attribute Name select Icon URI, and for New Attribute Value, enter /adf/webcenter/search qualifier.png (Figure 55–22).
8. Optionally, click the **Parameters** tab to customize the task flow parameters.

   **Note:** When Oracle SES 11.2.2.2 is configured, the **Parameters** tab does not appear, because the Search administration page is used for customizations.

9. Click **Add**, then **OK** to close the dialog. You see the new icon and description appear in the resource catalog (**Figure 55–23**).

**Figure 55–23  Search - Non-Faceted Search Task Flow Icon and Description**

10. Click **Save and Close** to save the resource catalog.

11. Back on the portal administration **Resource Catalogs** page, select this new resource catalog, and select its **Available** check box.

12. Go to the portal administration **Settings** page, and set the resource catalog for **Pages** to the resource catalog you just edited to contain the Search - Non-Faceted Search task flow (**Figure 55–24**).
13. In the portal, create a new page.

14. On the new page, add the Search - Non-Faceted task flow, as described in Section 14.2, "Adding a Component to a Page."

15. Save and close the page.

16. You can see the Search - Non-Faceted Search task flow with the icon on the page, and you can run a search term in the Search field (Figure 55-25).

After the task flow has been added, you can edit the task flow parameters. For more information, see Section 55.3.4.3, "Search Task Flow Parameters."

55.3.4.3 Search Task Flow Parameters

Table 55-4 describes the parameters that are unique to search task flows.
### Table 55–4  Search Task Flow Parameters

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
<th>Task Flow</th>
</tr>
</thead>
<tbody>
<tr>
<td>Custom Attributes</td>
<td>List of custom attributes to show when displaying search results. To include one or more custom attributes in the search results, set this to a list of custom attribute names, separated by commas. An optional label prefix may be provided with the custom attribute name to display instead of its associated custom attribute name. Use the format: label:name.</td>
<td>Search Non-Faceted Search, Search - Toolbar</td>
</tr>
<tr>
<td>Mimetype</td>
<td>List of content types to limit the search. To limit the search to certain document types, set this to the list of MIME types of the documents (such as PDF, PPT, DOC), separated by commas. <strong>Note:</strong> To limit search to Microsoft Word documents and WebCenter Portal pages, set this parameter to application/msword, and set the Services to be Included parameter to oracle.webcenter.doclib,oracle.webcenter.page. For more information, see Section 55.3.2.2, &quot;Searching Specific Document Types.&quot;</td>
<td>Search Non-Faceted Search, Search - Toolbar</td>
</tr>
<tr>
<td>Refiners to Hide</td>
<td>List of refiners to hide when displaying search results. To hide one or more refiners, set this to a list of refiner names, separated by commas (choose from author, date, portal, content, and tags).</td>
<td>Search Non-Faceted Search, Search - Toolbar</td>
</tr>
<tr>
<td>Search Scope</td>
<td>List of unique IDs to limit the search scope. To limit the search to a particular portal, set this to the GUID of the portal; for example, #{spaceContext.currentSpaceGUID}. If nothing is specified in this parameter, then all portals are searched. For more information, see Section 55.3.2.3, &quot;Searching Specific Portals.&quot;</td>
<td>Search Non-Faceted Search, Search - Toolbar</td>
</tr>
<tr>
<td>Search Box Size</td>
<td>Value to limit the size of the search box. The default value is 42. Enter a lower number (for example, 30) to shorten the length of the search box. This also changes the size of the search box in the Search - Non-Faceted Search task flow.</td>
<td>Search - Toolbar</td>
</tr>
<tr>
<td>Search Taskflow ID</td>
<td>Task flow ID of global search; for example, /oracle/webcenter/search/controller/taskflow/searchResults#search-view</td>
<td>Search - Toolbar</td>
</tr>
<tr>
<td>Services to be Included</td>
<td>List of IDs of tools and services or executors to include when displaying search results. For example, to display only announcements, enter oracle.webcenter.collab.announcement. For a list of service IDs, see the &quot;Service IDs&quot; section in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.</td>
<td>Search Non-Faceted Search, Search - Toolbar</td>
</tr>
<tr>
<td>Show or hide input box</td>
<td>Show or hide the input box. Set to true (default) to show the input box, or set to false to hide it.</td>
<td>Search Non-Faceted Search</td>
</tr>
</tbody>
</table>
Limitations with Search

Adding Search to a Portal

55.4 Limitations with Search

Note the following limitations with searching in WebCenter Portal:

- The user profile fields searched depend on the security settings configured on the Preferences - People - Profile page. A user who has not logged in can search by values in the fields set to Everyone. An authenticated user can search by values in the fields set to Authenticated Users and Everyone. A user who has a connection to the user of the profile can search by values in the fields set to User’s Connections, Authenticated Users, and Everyone. The user of the profile can search by values in the fields of all sections.

- WebCenter Portal’s live search adapter does not support wildcard searching.

- WebCenter Portal’s live search adapter does not recognize the following special characters:

  ! # $ % ^ & ( ) + = [ ] { } | ; ' " , < > / ? ` ~ - *

For example, when you search for the keyword Q2&Total, WebCenter Portal returns search results for Q2Total. A wiki page named Q2&Total is not found. If you require exact term searches (such as United Arab Emirates as opposed to United + Arab + Emirates), then you must use Oracle SES (since quotation marks are not recognized).
When searching lists, WebCenter Portal live search only searches list names and descriptions. Use Oracle SES for a more thorough search: It also searches list column names and contents.

Users can click the Previous and Next links to view any additional results (Figure 55–26). Oracle SES results show an estimated number of search results. However, live search results do not include an estimated number of results. Links may appear even if no additional results are available.

Figure 55–26  Estimated Number of Search Results
This chapter describes how to add tagging functionality to a portal to enable users to add and manage tags for pages.

This chapter includes the following topics:

- Section 56.1, "About Tagging"
- Section 56.2, "Adding a Tags Icon to a Portal Page"
- Section 56.3, "Adding a Tagging Task Flow to a Page"
- Section 56.4, "Setting Tagging Task Flow Properties"
- Section 56.5, "Working with Tagging Features and Task Flows"

Permissions: To perform the tasks in this chapter, you must be a portal moderator or member with the permission Basic Services: Edit Page Access and Structure (simple permissions) or Pages: Edit Pages (advanced permissions).

For more information about permissions, see Section 29.1, "About Roles and Permissions for a Portal."

56.1 About Tagging

Webcenter Portal users can tag pages and documents, as described in the following sections:

- Section 56.1.1, "About Tagging on Portal Pages"
- Section 56.1.2, "About Tagging on Documents"

56.1.1 About Tagging on Portal Pages

For general information about tags and the Tag Center, see "About Tags" and "About the Tag Center" in Using 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 Section 56.2, "Adding a Tags Icon to a Portal Page."
Adding a Tags Icon to a Portal Page

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 Section 56.3, "Adding a Tagging Task Flow to a Page."):

- **Tags** displays tags created by the current user. In the Tags task flow, a user can sort, filter, rename, and delete tags. Clicking a tag displays the Tag Center, where that tag is selected.
- **Tag Cloud** 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** displays tagged items for a tag selected in the Tag Cloud task flow.
- **Similarly Tagged Items** displays other pages or documents that have at least one tag in common with the current page.

For general information about tags and the Tag Center, see "About Tags" and "About the Tag Center" in Using Oracle WebCenter Portal.

56.1.2 About Tagging on Documents

In a document, a user can enter and manage tags on the Tags pane to add keyword to the document to make the document discoverable in search results. See "Managing Tags on Files" in Using Oracle WebCenter Portal.

56.2 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 Section 7.3.2, "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:

- **Section 56.2.1, "Adding a Tags Component to a Page Template"**
- **Section 56.2.2, "Adding a Tags Component to an Individual Page"**

56.2.1 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 a Tags component.

To add a Tags component to a page template:

1. Create or edit a page template (see Section 21.3, "Creating a Page Template" or Section 21.4, "Editing a Page Template").

2. In Composer, add a Tags component to the page template (see Section 14.2, "Adding a Component to a Page").

**Note:** In the Default Page Template Catalog, the Tags component is available under **Portal Components**.

---

**Figure 56–1  Tags Icon**

- **Tags**
  - **Tags** displays tags created by the current user. In the Tags task flow, a user can sort, filter, rename, and delete tags. Clicking a tag displays the Tag Center, where that tag is selected.
  - **Tag Cloud** 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** displays tagged items for a tag selected in the Tag Cloud task flow.
  - **Similarly Tagged Items** displays other pages or documents that have at least one tag in common with the current page.

For general information about tags and the Tag Center, see "About Tags" and "About the Tag Center" in Using Oracle WebCenter Portal.
When you select this page template in the portal administration settings (see Section 7.3.2, "Changing the Page Template for a Portal"), then all pages created in the portal will include a Tags icon.

### 56.2.2 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 Section 56.2.1, "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 edit mode (see Section 12.4.3, "Opening a Page in the Page Editor (Composer)").
2. Add a Tags component to the page (see Section 14.2, "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, the Tags 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 a custom resource catalog that has been made available to the page.

For more information, see Section 23.5.1, "Adding a Resource to a Resource Catalog" (in the Add Resource Catalog Item dialog, select Portal Components, then Tags). 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 Section 7.3.5, "Changing the Resource Catalogs for Pages and the Page Template for a Portal."

---

### 56.3 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 Oracle WebCenter Portal:

- Working with 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 Section 14.2, "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 Portal Catalog, the Tagging task flows are included under the Tagging and Searching folder.

### 56.4 Setting Tagging Task Flow Properties

Tagging task flows have associated properties, which users with sufficient privileges can access from the Component Properties dialog in Composer (Figure 56–2).
The following sections provide information about properties of the Tagging task flows and describe the properties available on the **Parameters** tab.

- Section 56.4.1, "About Tagging Task Flow Properties"
- Section 56.4.2, "Tagging Task Flow Parameters"

### 56.4.1 About Tagging Task Flow Properties

The properties on the **Parameters** tab of the Component Properties dialog control the default task flow content. For descriptions of the parameters on this tab, see Section 56.4.2, "Tagging Task Flow Parameters." For some task flows, parameters on this tab facilitate the wiring of the task flow to page parameters and page definition variables. For information about wiring pages and components, see Chapter 19, "Wiring Pages, Task Flows, Portlets, and ADF Components."

Changes to the properties on the **Display Options**, **Style**, and **Content Style** tabs affect the appearance and behavior of the task flow for all users. These properties are common to all task flows. For more information, see Section 14.3.4, "Working with Component Display Options" and Section 14.3.6, "Working with Style and Content Style Properties."

The contents of the **Events** tab depend on the events supported by the task flow. For more information, see Section 14.3.7, "Working with Component Contextual Events."

All properties on the **Parameters** and **Display Options** tabs provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the ➔ 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 the "Expression Language Expressions" appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

### 56.4.2 Tagging Task Flow Parameters

Table 56–1 describes the parameters that are unique to Tagging task flows.

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
<th>Task Flow</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resource ID</td>
<td>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.</td>
<td>Similarly Tagged Items</td>
</tr>
<tr>
<td>Service ID</td>
<td>This parameter has different meaning for different task flows:</td>
<td>Similarly Tagged Items</td>
</tr>
<tr>
<td></td>
<td>■ In Similarly Tagged Items, 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.</td>
<td>Tags</td>
</tr>
<tr>
<td></td>
<td>■ In Tags, it limits the tags and tagged items to this tool/service; for example, oracle.webcenter.page.</td>
<td></td>
</tr>
<tr>
<td>Scope of Tags</td>
<td>Scope of tags. This value is set automatically. Do not change this value.</td>
<td>Tag Cloud</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Tag Cloud Related Resources</td>
</tr>
</tbody>
</table>

**Note:** You should not change Tagging task flow properties unless you want to show items from a different resource or different tool or service.

### 56.5 Working with Tagging Features and Task Flows

For information about how users work with tags they add and the Tagging task flows (views), see the "Using Tags" chapter in Using Oracle WebCenter Portal.
Adding Worklists to a Portal

This chapter describes worklists and adding a worklist to your portal. Worklists can provide access to all assigned worklist items that are associated with the SOA server configured to this portal instance. Worklist notifications and alerts are queried from all the BPEL servers configured in WebCenter Portal.

This chapter includes the following topics:

- Section 57.1, "Prerequisites for Working with Worklists"
- Section 57.2, "About Worklists"
- Section 57.3, "Setting Messaging Preferences"
- Section 57.4, "Adding a Worklist Task Flow to a Page"
- Section 57.5, "Setting Worklist Task Flow Properties"
- Section 57.6, "Working with the Worklist Task Flow"

Permissions: To perform the tasks in this chapter, you need the portal-level permission Manage Security and Configuration or Manage Configuration.

To add the worklist task flow to a page and to edit the feed location, you need the portal-level permission Basic Services: Edit Page Access, Structure, and Content (simple permissions) or Create, Edit, and Delete Pages (advanced permissions).

A portal moderator has these permissions by default.

For more information about permissions, see Section 29.1, "About Roles and Permissions for a Portal.”

57.1 Prerequisites for Working with Worklists

For worklists, the system administrator needs to perform the following task for WebCenter Portal:

- Configure a BPEL server connection and set up an active connection between the server and WebCenter Portal. If the server is not configured, you will not be able to use this feature. For more information, see the “Managing Worklists” chapter in Administering Oracle WebCenter Portal.

See Also: “Troubleshooting Issues with Worklists” section in Administering Oracle WebCenter Portal.
For worklists to show in a portal, the portal moderator or anyone with Manage Security and Configuration or Manage Configuration permission in the portal has to perform the following task at the portal level:

- Add the Worklist task flow to a page in the portal, as described in Section 57.4, "Adding a Worklist Task Flow to a Page."

**Note:** For information about worklists and how to use worklists, see Section 57.6, "Working with the Worklist Task Flow."

### 57.2 About Worklists

Worklists provide access to BPEL worklist items that are created when a BPEL workflow process is invoked, or when messages are sent to the worklist channel on the Oracle User Messaging Service. This service is configured by the WebCenter Portal system administrator. For more information, see the "Managing Worklists" chapter in *Administering Oracle WebCenter Portal*.

In WebCenter Portal, the Worklist task flow (Figure 57–1) enables you to view and respond to all the worklist items that are assigned to you. Note that you can be notified in other ways as well, for example, by email. If alerts and notifications are processed as worklist items for you, you can view them in the worklist view as the logged in user.

**Figure 57–1  Worklist Task Flow**

![Worklist Task Flow](image)

If BPEL workflows are enabled in WebCenter Portal, you must add a Worklist task flow to a page to allow users to see portal membership notifications, invitations to join new portals, and so on. See Section 57.4, "Adding a Worklist Task Flow to a Page." If the Oracle BPM Worklist has been configured with the User Messaging Service’s email driver to send notifications associated with BPM Workflows, then users may also receive email notifications for their worklist items that require their action (also provided the mail service is configured).

The worklist only shows items from the Oracle SOA Suite BPEL Servers. Some worklist items are caused by events that are associated with an externally defined workflow. A workflow maps the route an item follows after an event starts. For example, a workflow might define the way a project assignment is routed, such as from administrator to moderator, and then to participant. Additionally, it specifies what happens (if anything) when the assignee responds (such as with an **Acknowledge**). This type of workflow is enabled in a Workflow server that comes with Oracle SOA Suite. The definition of these workflows is an administrative or development task.

WebCenter Portal also has internally-defined workflows. An example of an internally-defined workflow includes the process of subscribing to a portal. A user requests a subscription. The request appears on the portal moderator’s worklist.
portal has multiple moderators, the first response to the worklist item is to claim ownership of the request, so that only one moderator responds to the request itself.

Messages, alerts, and notifications might also come from the User Messaging Service. The Worklist task flow includes a control for accessing messaging preferences on this server (Figure 57–2). Click the Messaging preferences icon to display the User Messaging Preferences page in which you can specify the channels over which to receive User Messaging Service messages and define messaging filters.

For information about setting messaging preferences for the User Messaging Service through WebCenter Portal, see Section 57.3, "Setting Messaging Preferences."

Worklist display options let users respond to messages, alerts, and notifications according to timeliness and relevance. For more information about using worklist display options and other features, see the "Working with Worklists" chapter in Using Oracle WebCenter Portal.

57.3 Setting Messaging Preferences

The Worklist Messaging preferences icon provides access to controls for specifying your messaging preferences on the User Messaging Service. Use messaging preferences to specify the channels over which to receive User Messaging Service messages and to define messaging filters. User Messaging Service messages may include worklist notifications in addition to other notifications and alerts from other consumers of the server.

Messaging channels are the channels over which messages, notifications, and alerts are received from the User Messaging Service. These include mail, voice over internet (VoIP), and so on. Messages, notifications, and alerts come from the services that are registered with the User Messaging Service.

Messaging filters define sorting conditions for messages and specify the channels through which to send messages that meet those conditions.

You can define messaging channels and filters using the User Messaging Preferences dialog. This section provides an overview of how to use this dialog to configure messaging channels and define messaging filters for messages generated from the User Messaging Service. For more information, see the User Messaging Service online help and the "Oracle User Messaging Service Applications" chapter in Developer's Guide for Oracle SOA Suite.

To access the User Messaging Preferences dialog from the Worklist task flow:

1. Go to a worklist.
2. Click the Messaging preferences icon (Figure 57–2) in the Worklist toolbar.

3. Log in to the BPEL server.
A web page opens with two tabs (Figure 57–3):

- **Messaging Channels**—Configure channels (such as mail, voice, and so on) to receive your User Messaging Service notifications and alerts.

- **Messaging Filters**—Define rules for filtering your User Messaging Service notifications and alerts.

Configure channels and filters by referring to the User Messaging Service online help.

### 57.4 Adding a Worklist Task Flow to a Page

For the steps to add a Worklist task flow to a page, see Section 14.2, "Adding a Component to a Page."

**Tip:** The presence or location of the Worklist task flow depends on how the resource catalog is configured. For example, in the Default Portal Catalog, the Worklist task flow is included under the **Alerts and Updates** folder.

All of the information in a worklist is specifically relevant to the current, logged in user. For this reason, it would not be appropriate to add this task flow to the Home portal which might be used as a public page, where the task flow will display a "Service not available" message if the page is accessed without logging in. Add this page to a portal page so that it displays information that is in context to the current portal, and therefore relevant to the user.

Users with Edit privileges can access the task flow’s Component Properties dialog in Composer. For information about configuring a worklist task flow, see Section 57.5, "Setting Worklist Task Flow Properties."
57.5 Setting Worklist Task Flow Properties

Worklist task flows have associated properties, which users with sufficient privileges can access through the Component Properties dialog (Figure 57–4) in Composer.

Figure 57–4  Worklist Task Flow Component Properties

![Component Properties: Worklist](image)

To access the Component Properties dialog, see Section 14.3, "Modifying Component Properties."

The Worklist task flow does not have any unique properties, and therefore no Parameters tab in the Component Properties dialog.

Changes to the properties on the Display Options, Style, and Content Style tabs affect the appearance and behavior of the task flow for all users. These properties are common to all task flows. For more information, see Section 14.3, "Modifying Component Properties."

The content of the Events tab depends on the events supported by the task flow. For more information, see Section 14.3.7, "Working with Component Contextual Events."

57.6 Working with the Worklist Task Flow

For information about worklists and how to use the features of worklists, see the "Exploring Your Worklists" chapter in Using Oracle WebCenter Portal.
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.

- Chapter 58, "Managing All Portal Templates"
- Chapter 59, "Working with Shared Assets"
Managing All Portal Templates

This chapter describes how to manage the portal templates available to all users. This chapter includes the following topics:

- Section 58.1, "About Managing Portal Templates"
- Section 58.2, "Viewing All Portal Templates"
- Section 58.3, "Importing and Exporting Portal Templates"
- Section 58.4, "Creating a New Portal Template"
- Section 58.5, "Viewing Information About a Portal Template"
- Section 58.6, "Searching for a Portal Template"
- Section 58.7, "Renaming a Portal Template"
- Section 58.8, "Setting Up Access to a Portal Template"
- Section 58.9, "Publishing and Hiding Portal Templates"
- Section 58.10, "Deleting a Portal Template"

**Permissions:** To perform the tasks in this chapter, you need the permissions granted to the Application Specialist role (or the Portal Templates-Manage All permission). Users with this permission can view and manage all portal templates, including private portal templates created by other users, and import or export portal templates.

For more information about permissions, see Section 29.1, "About Roles and Permissions for a Portal."

### 58.1 About Managing Portal Templates

When creating a portal, users can base it on one of the out-of-the-box portal templates, 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 exactly as required by an organization. For more information, see Section 3.1, "About Portal Templates."

Application specialists (or any user with the Portal Templates-Manage All permission) can manage every portal template from the application-level Portal Templates page (Figure 58–1). You can see which portal templates are currently available and delete portal templates when they are no longer required. You can also
publish templates—making them available to everyone—or restrict them to private use only.

It is important to keep the portal template list up to date and valid. Anyone who creates a portal will see public templates as well as their own private templates.

The Portal Templates page provides import and export services, too. For more information, see Section 58.3, "Importing and Exporting Portal Templates."

### 58.2 Viewing All Portal Templates

On the application-level Portal Templates page, you can quickly see who created each portal template, and the date on which it was created. The Actions menu offers additional options for deleting portal templates, and you can publish and hide templates from here, too.

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 Portal Builder.
2. Click the Portal Templates tab to display the Portal Templates page (Figure 58–1).

#### Figure 58–1  Portals Administration - Portal Templates Page

![Portal Templates Page](image)

### 58.3 Importing and Exporting Portal Templates

This section describes how to import and export portal templates:

- Section 58.3.1, "Importing Portal Templates"
- Section 58.3.2, "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 the "Deploying Portals, Templates, Assets, and Extensions" chapter in Administering Oracle WebCenter Portal.
58.3.1 Importing Portal Templates

Application specialists (and other users with Portal Templates-Manage All permission) 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 Section 58.9, "Publishing and Hiding Portal Templates."

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 the "Importing Portal Templates from an Archive Using WLST" section in *Administering Oracle WebCenter Portal*.

To import one or more portal templates from a .par file:

1. On the application-level Portal Templates page (see Section 58.2, "Viewing All Portal Templates"), click Import in the toolbar.

   The Import Portal Templates pane opens (Figure 58–2).

**Figure 58–2 Importing Portal Templates**

![Import Portal Templates pane](image)

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 58–3).

**Figure 58–3  Importing Portal Templates**

The names of all the 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. When the Import Portal Template dialog show the import is complete, click Close to dismiss the Import Portal Templates pane.

![Import Portal Templates Progress](image)

Initially, newly imported portal templates are available only to you. To make them public, see Section 58.9, "Publishing and Hiding Portal Templates."

### 58.3.2 Exporting Portal Templates

Application specialists (and other users with the Portal Templates-Manage All permission) can export portal templates from WebCenter Portal to a portal archive (.par file) and deploy them on another portal server. Out-of-the-box 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, discussions, 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 Portal Builder 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`
You can save export archives to your local file system or to a remote server file system.

**Note:** You cannot export portals and portal templates into a single archive. Exporting portals is a separate process that can be performed only by a system administrator, as described in the "Importing One or More Portals from an Archive" section in *Administering Oracle WebCenter Portal*.

To export one or more portals templates from WebCenter Portal:

1. On the application-level **Portal Templates** page (see Section 58.2, "Viewing All Portal Templates"), select the portal template required 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 dialog opens (Figure 58–5). All the portal templates that you select are listed.
   If you want to exclude a portal template, click the **Delete** icon.
3. 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`
4. Click **Export**.
5. Monitor progress information that is displayed during the export process (Figure 58–6).

When the export process is complete, specify a location for the export archive (.par).

**Figure 58–6  Export Portal Templates Progress**

<table>
<thead>
<tr>
<th>Export Portal Templates</th>
</tr>
</thead>
<tbody>
<tr>
<td>Portal Archive: webcenter_1371526274231.par</td>
</tr>
<tr>
<td>Progress: 0% - 100%</td>
</tr>
</tbody>
</table>

Processing content...
Content processing complete.
Data processing complete.
Metadata processing complete.
Processing security...
Security processing complete.
Portal template(s) exported successfully.

Select one of:

- **Download**. Saves the export .par file to your local file system.
Your browser downloads and save the archive locally. The actual download location depends on your browser set up.

- **Save to Server.** Saves the export .par file to a server location. For example, /tmp. Ensure that there are write permissions on the server directory that you specify.

After clicking **Save to Server**, enter the **Server Location** and then click **Save**.

6. Click **Close**.

The export archive (.par) is saved to the specified location.

### 58.4 Creating a New Portal Template

You cannot modify the out-of-the-box portal templates described in Section 3.1, "About Portal Templates," but any user with Portal Templates-Create permission can create new portal templates. This permission is granted to the Application Specialist role by default.

To create a new portal template, you start by creating a portal based on an existing template (see Chapter 2, "Creating and Building a New Portal"), 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 discussions, documents, lists, member information (including roles), pages, or assets from the parent portal. The security settings for the parent portal are inherited by the template.

---

**Note:** When creating a new portal template, the template does not inherit announcements from the parent portal.

---

As an application specialist (or any user with Portal Templates-Manage All permission) you can publish a portal template for others to use; otherwise, it remains private and hidden from others.

To create a portal template:

1. On the application-level **Portal Templates** page (see Section 58.2, "Viewing All Portal Templates"), click **Create** to open the Create dialog (Figure 58–7).

---

**Note:** There must be at least one portal available to use as the basis for the new portal template. Otherwise, the **Create** action is not active.
2. 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 described in Section 58.7, "Renaming a Portal Template."

   Portal template names can contain alphanumeric characters, underscores, spaces, multibyte characters, and special characters such as `&` and `#`. The maximum allowable length is 200 characters. The following reserved keywords are not allowed as the full 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, webscenter administration, webcenter portal, webcenter portals, webcenter space, webcenter spaces. These reserved words are allowable as part of a longer name (for example, Sales Group).

3. From the **Category** list, select a category for the portal template, or leave as `<None>` if no category is suitable. For descriptions of the available categories, see Table 3–1, "Out-of-the-Box Portal Templates and Categories". Click **Next**.

4. In the **Portals** step (Figure 58–8), 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. Click **Next**.
5. In the **Content** step, select the services that contain data that you want the portal template to inherit from the parent portal (Figure 58–9).

**Note:**
- Portal templates cannot inherit announcements from a parent 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. For a full list of portal assets, see Section 20.1, "About Assets." 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.
6. Click Create.

The new portal template displays on the Portal Templates page. By default, the template is private, which means that other users will not see it on their personal Portal Templates page in the Home portal.

7. To publish your 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.

58.5 Viewing Information About a Portal Template

To view information about a portal template:

1. On the application-level Portal Templates page (see Section 58.2, "Viewing All Portal Templates"), click in the row of the portal template.

2. From the Actions menu, select About Portal Template.

The About Portal Template dialog opens (Figure 58–10).
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 Section 58.7, "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 Section 58.7, "Renaming a Portal Template."
   - **Created By**: User name of the portal template creator.
   - **Date Created**: Date and time that the portal template was created.
   - **Direct URL**: URL that provides direct access to the portal template.

### 58.6 Searching for a Portal Template

Global search does not search portal assets, such as portal templates, page templates, resource catalogs, navigation models, 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.

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

1. On the application-level Portal Templates page (see Section 58.2, "Viewing All Portal Templates"), enter a search string in the **Filter** field.
2. Click the **Filter** icon (Figure 58–11).
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 58–12).

Figure 58–12  Clear Filter Icon

58.7 Renaming a Portal Template

To rename a portal template:

1. On the application-level Portal Templates page (see Section 58.2, "Viewing All Portal Templates"), click in the row of the portal template.
2. From the Actions menu, select Rename Portal Template to open the Rename Portal Template dialog.
3. In the Display Name field, enter a new name for the portal template. Optionally, enter a Description.
4. Click OK.

58.8 Setting Up Access to a Portal Template

You can grant specific users and groups read-only or manage access to a portal template.

To set up access to a portal template:

1. On the application-level Portal Templates page (see Section 58.2, "Viewing All Portal Templates"), click in the row of the portal template.
2. From the Actions menu, select Set Template Access.

The Set Template Access dialog opens (Figure 58–13).
3. In the Set Template Access dialog:
   - Click **Add Users** to open the Search Users dialog where you can select from a list of users or search for a user name.
   - Click **Add Groups** to open the Search Groups dialog where you can search for a user group.

   For tips on searching for a user or group in the identity store, see Section 30.5.1, "Searching for a User or Group in the Identity Store."

4. For each user or user group listed in the Set Template Access dialog, specify which level of access to grant (one permission per user or user group):
   - Select the **View** check box to grant read-only access to the portal template.
   - Select the **Manage** check box to grant full access to the portal template.

5. Click **OK**.

### 58.9 Publishing and Hiding Portal Templates

While WebCenter Portal can accommodate any number of templates, a limited number of templates is sometimes more effective. On the application-level Portal Templates page, you can maintain the template list that is available to all users.

To publish or hide portal templates (including the out-of-the-box templates):

1. On the application-level **Portal Templates** page (see Section 58.2, "Viewing All Portal Templates"), select the portal template(s).

2. From the **Actions** menu, select either of the following:
   - **Make Public** to publish the template(s) to all WebCenter Portal users.
   - **Remove Public Access** to remove the template from the portal template lists in the Home portal for all users, except for the template creator and those
users you have specifically been granted View or Manage access in the Set Template Access dialog (see Section 58.8, "Setting Up Access to a Portal Template").

3. In the confirmation prompt, confirm your selection.

### 58.10 Deleting a Portal Template

Note: Out-of-the-box portal templates cannot be deleted. However, you can hide the out-of-the-box templates from everyone's view by making them private, as described in Section 58.9, "Publishing and Hiding Portal Templates."

Deleting a portal template does not affect the portals that were created using the portal template.

To delete one or more portal templates that are no longer required:

1. On the application-level Portal Templates page (see Section 58.2, "Viewing All Portal Templates"), select the portal template(s).

2. From the Actions menu, select Delete Portal Template.

3. In the confirmation prompt, click Delete.
This chapter describes the different assets that are available for you to use across all portals and some of the common operations you can perform on those assets. Shared assets include navigation models, page templates, page styles, resource catalogs, and so on. This chapter focuses on working with the assets that are available to all portals.

For information about assets available to individual portals, see Chapter 20, "Creating, Editing, and Managing Portal Assets."

This chapter includes the following topics:

- Section 59.1, "About Shared Assets"
- Section 59.2, "Accessing Shared Assets"
- Section 59.3, "Creating Shared Assets"
- Section 59.4, "Editing Shared Assets"
- Section 59.5, "Managing Shared Assets"
- Section 59.6, "Setting the Availability of a Shared Asset"
- Section 59.7, "Working with Shared Assets in JDeveloper"

Permissions: To perform the tasks in this chapter, you must be an application specialist (have 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 the "About Application Roles and Permissions" section in Administering Oracle WebCenter Portal.

59.1 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 Section 20.1, "About Assets."

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.

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. For more information, see Section 59.6, "Setting the Availability of a Shared Asset."

If a shared asset is available for use in a portal it is listed on the Assets page for that portal. The Shared icon (Figure 59–1) next to the asset's name indicates that it is a shared asset. However, shared assets can be edited only at the application level in the Shared Assets page.

Figure 59–1 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 Chapter 20, "Creating, Editing, and Managing Portal Assets."

59.2 Accessing Shared Assets

You access shared assets using the Shared Assets page. When you access the Shared Assets page, it lists all the assets available for use across all portals (Figure 59–2).

Figure 59–2 The Shared Assets Page

To access shared assets:

1. From the Portals menu, select Portal Builder.
For more information, see Section 7.1, "Accessing Portal Administration."

2. Click the Shared Assets tab to display the Shared Assets page (Figure 59–2).

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

http://host:port/webcenter/portal/builder/assets

See Also: Appendix A, "WebCenter Portal Pretty URLs"

59.3 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 Section 20.3, "Creating Assets."

59.4 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 Select**—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 Section 20.8, "Working with Portal Assets in JDeveloper."

Editing shared assets follows the same procedure as editing portal assets. For more information, see Section 20.4, "Editing Assets."

59.5 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 Section 20.5, "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 Section 59.6, "Setting the Availability of a Shared Asset."

59.6 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 the shared asset is available in the Home portal and all portals, or only in selected portals.

You can set availability of assets only at the application level. Portal assets by definition are available only to the portal in which they are created.

Use the Exclude Asset Usage section of the Edit Properties dialog to set the availability of a shared asset in the Home portal or a portal.

To set the availability of a shared asset:

1. Navigate to the Shared Assets page.

   For more information, see Section 59.2, "Accessing Shared Assets."

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. From the Actions menu, select Edit Properties.

   Figure 59–3 The Exclude Asset Usage Section of the Edit Properties Dialog

   ![Edit Properties - Example Shared Page Template](image)

   - For the Exclude From Home Portal check box:

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**.

### 59.7 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 Portals with Oracle WebCenter Portal and Oracle JDeveloper*.

**Note:** In JDeveloper, *assets* are referred to as portal *resources*.

Mostly, working with shared assets in JDeveloper follows the same procedure as working with portal assets. For more information, see Section 20.8, "Working with Portal Assets in JDeveloper."
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.

- Chapter 60, "Creating a Look and Feel for Portals"
- Chapter 61, "Translating Portals into Other Languages"
60

Creating a Look and Feel for Portals

This chapter describes how to use the features available in WebCenter Portal to create the look and feel for a portal, including how to optimize the look and feel of a portal for display on mobile devices.

This chapter includes the following topics:

- Section 60.1, "About Creating a Look and Feel"
- Section 60.2, "About Optimizing Portals for Mobile Devices"
- Section 60.3, "About Design Tools"

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 need 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 the "About Application Roles and Permissions" section in Administering Oracle WebCenter Portal.

60.1 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 Chapter 21, "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 Chapter 22, "Working with Navigation Models."

- **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 Chapter 24, "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 Chapter 25, "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 Chapter 28, "Working with Content Presenter Templates."

## 60.2 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 *Section 20.4.2, “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;
}
```
Set the Reset skin to inherit settings from V1.2 ADF skins as shown in Figure 60–1.

**Figure 60–1  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:

```css
@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:

```html
<script>
  var 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:

```html
#{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:

```html
#{requestContext.agent.platformName=='windows' ? '' :
  '<META HTTP-EQUIV="Refresh" CONTENT="0;
  URL=http://<host>/myApp/faces/PhoneWelcome.jspx">'}
```

**See Also:** For information about how to use device settings to determine the page template and skin to use for different mobile devices, see Chapter 9, "Managing Device Groups for a Portal."

For information about how to create alternative pages designed for display on mobile devices, see Section 12.3, "Creating a Page Variant for a Device Group."

### 60.3 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 60–2** 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 60–2  Google Chrome Inspection
This chapter describes how to translate portals into other languages. WebCenter Portal provides controls for language selection at the application, portal, and user levels.

This chapter includes the following topics:

- Section 61.1, "About Languages in WebCenter Portal"
- Section 61.2, "Configuring Language Options"
- Section 61.3, "Enabling Users to Choose a Language"
- Section 61.4, "Editing Strings or UI Text for a Particular Portal"
- Section 61.5, "Presenting Translated Content Through a Content Presenter Template"

Permissions:

To perform the tasks in this chapter, you need the portal-level permission Basic Services: Edit Page Access, Structure, and Content, granted by the portal moderator. 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 Section 29.1, "About Roles and Permissions for a Portal."

61.1 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:

- Section 61.1.1, "Handling Different Information Types For Translation"
- Section 61.1.2, "Display Language Precedence"
- Section 61.1.3, "Languages Supported Out-of-the-Box by WebCenter Portal"
61.1.1 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 button labels and seeded boilerplate text, as shown in Figure 61–1.

![Figure 61–1 User Interface Elements Displayed in WebCenter Portal](image)

- User-entered metadata, such as portal and page names, as shown in Figure 61–2.

![Figure 61–2 Metadata Entered by Users, Including Portal and Page Names](image)

- Content added by users, including announcements, documents, and discussion forum content
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 by users** is generally displayed in the language used by the contributing user, though there is a way that your system administrator can display translated content using Content Presenter.

### 61.1.2 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 the "Choosing a Default Display Language" section in *Administering Oracle WebCenter Portal*.

- **Portal default language**—The language set by the portal moderator for a given portal. For more information, see *Section 7.3.9, "Setting a Portal Display Language."* This setting is not considered while determining the display language for Home portal.

- **User preference setting**—The language that the user selects through the personal Preferences settings. For more information, see the "Setting Your Preferred Display Language" section in *Using 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.

---

### 61.1.3 Languages Supported Out-of-the-Box by WebCenter Portal

WebCenter Portal provides runtime translations for 28 languages and 100 different locales.

Table 61–1 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>
<thead>
<tr>
<th>A to Ge</th>
<th>Gr to Ro</th>
<th>Ru to T</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arabic</td>
<td>Greek</td>
<td>Russian</td>
</tr>
<tr>
<td>Brazilian Portuguese</td>
<td>Hebrew</td>
<td>Simplified Chinese</td>
</tr>
<tr>
<td>Czech</td>
<td>Hungarian</td>
<td>Slovak</td>
</tr>
<tr>
<td>Danish</td>
<td>Italian</td>
<td>Spanish</td>
</tr>
<tr>
<td>Dutch</td>
<td>Japanese</td>
<td>Swedish</td>
</tr>
<tr>
<td>English</td>
<td>Korean</td>
<td>Thai</td>
</tr>
<tr>
<td>Finnish</td>
<td>Norwegian</td>
<td>Traditional Chinese</td>
</tr>
<tr>
<td>French</td>
<td>Polish</td>
<td>Turkish</td>
</tr>
<tr>
<td>French-Canada</td>
<td>Portuguese</td>
<td></td>
</tr>
<tr>
<td>German</td>
<td>Romanian</td>
<td></td>
</tr>
</tbody>
</table>
61.1.4 Fallback Language Mechanism

In WebCenter Portal, languages can have country-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.

61.2 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 moderator, or user:

**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

The Discussions feature uses the Jive application. Out-of-the-box, the Jive application bundled with WebCenter Portal supports English and Spanish. It does not support other languages listed in Table 61–1. However, Jive is open to your own translation files. For more information, refer to the Jive documentation site. This information is explicit to the Jive application user interface.

**Note:** The Pagelet Producer Administration UI supports 9 administration languages and Dutch.
Enabling Users to Choose a Language

- 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 the "Choosing a Default Display Language" section in *Administering Oracle WebCenter Portal*.

- Portal moderators 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 Section 7.3.9, "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 "Setting Your Preferred Display Language" section in *Using 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_Spaces/logs.

---

61.3 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:

- Section 61.3.1, "Adding a Change Language Task Flow to a Page"
- Section 61.3.2, "Setting Change Language Task Flow Properties"

61.3.1 Adding a Change Language Task Flow to a Page

You can add the Change Language task flow to any page (in the Home 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 edit mode, as described in Section 12.4.3, "Opening a Page in the Page Editor (Composer)."

   **Note:** By default, the view switcher is set to and Composer displays the page in Design view showing the inline resource catalog.

2. Locate the Change Language task flow in the 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 Section 23.5.1, "Adding a Resource to a Resource Catalog."

3. Click Add next to the Change Language task flow.

4. Click Save to save your changes.
61.3.2 Setting Change Language Task Flow Properties

The Change Language task flow has associated properties, which users with sufficient privileges can access through the Component Properties dialog in Composer (Figure 61–4).

For information about the Component Properties dialog, see Section 14.3, "Modifying Component Properties."

Figure 61–4  Change Language Task Flow - Component Properties

The following sections provide information about the properties of the Change Language task flow and describe the properties on the Parameters tab:

- Section 61.3.2.1, "About the Change Language Task Flow Properties"
- Section 61.3.2.2, "Change Language Task Flow Parameters"

61.3.2.1 About the Change Language Task Flow Properties

The properties on the Parameters tab of the Component Properties dialog control the default task flow content. For descriptions of the parameters on this tab, see Section 61.3.2.2, "Change Language Task Flow Parameters." For some task flows, parameters on this tab facilitate the wiring of the task flow to page parameters and page definition variables. For information about wiring pages and components, see Chapter 19, "Wiring Pages, Task Flows, Portlets, and ADF Components."

Changes to the properties on the Display Options, Style, and Content Style tabs affect the appearance and behavior of the task flow for all users. These properties are common to all task flows. For more information, see Section 14.3, "Modifying Component Properties."

The contents of the Events tab depend on the events supported by the task flow. For more information, see Section 14.3.7, "Working with Component Contextual Events."

All properties on the Parameters and Display Options tabs provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the 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 the "Expression Language Expressions" appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

### 61.3.2.2 Change Language Task Flow Parameters

Table 61–2 describes the parameters that are unique to the Change Language task flow.

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Global</td>
<td>Specifies whether the change is global or limited to the current portal.</td>
</tr>
<tr>
<td>Display Detailed List</td>
<td>Displays a detailed list of languages, including locales.</td>
</tr>
<tr>
<td>Persist Change to</td>
<td>Persists the user's language choice to the user's preferences.</td>
</tr>
<tr>
<td>Preferences</td>
<td>Default: Not selected</td>
</tr>
</tbody>
</table>

### 61.4 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 sub-sections:

- Section 61.4.1, "Editing a Particular String or Portal"
- Section 61.4.2, "Finding the Resource Key for a String"
- Section 61.4.3, "Finding the GUID for a Portal"

#### 61.4.1 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 the "Managing a Multilanguage Portal" chapter in Administering Oracle WebCenter Portal.

#### 61.4.2 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 Composer. For details, see Section 21.4, "Editing a Page Template."
2. Click the Edit icon (wrench) for the component that includes the string you want to edit.

3. In the Component Properties dialog, click the Display Options tab.

4. The resource key is the last part of the text in the Text box.

For example, Figure 61–5 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 61–5  Display Options for Announcements Component - Resource Key**

![Display Options for Announcements Component - Resource Key](image)

### 61.4.3 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 61–6).
61.5 Presenting Translated Content Through a Content Presenter Template

To display translated content, you must create a Content Presenter template that looks up the display language and then displays content from a language-specific folder. For information about creating a Content Presenter template, see the “Creating Content Presenter Display Templates” chapter in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.
This part of *Building Portals with Oracle WebCenter Portal* provides appendices with supporting information for the chapters in this guide.

- Appendix A, "WebCenter Portal Pretty URLs"
- Appendix B, "Portal Components"
- Appendix C, "Data Presenter Examples"
This appendix provides the syntax for the pretty URLs in WebCenter Portal. Pretty URLs are more intuitive and shorter than standard URLs. Instead of clicking navigation links, or if navigation links do not exist to certain pages, you can enter a pretty URL in your browser to directly access user profiles, pages, and administration screens.

This appendix includes the following topics:

- Section A.1, "Pretty URLs for WebCenter Portal Administration Pages"
- Section A.2, "Pretty URLs for System Pages"
- Section A.3, "Pretty URLs for Managing All Portals"
- Section A.4, "Pretty URLs for the Default Portal"
- Section A.5, "Pretty URLs for User Profiles"
- Section A.6, "Pretty URLs for the Home Portal"
- Section A.7, "Pretty URLs for Pages in a Specified Portal"

A.1 Pretty URLs for WebCenter Portal Administration Pages

See Also: For information about the business role, system, and personal pages managed by the system administrator, see the "Managing Portals in Portal Builder Administration" chapters in Administering Oracle WebCenter Portal.

Table A–1 lists and describes the syntax for the pretty URLs that provide easy access to the administration pages managed by the WebCenter Portal system administrator, including business role, system, and personal pages.

Through the WebCenter Portal user interface, these pages are accessed through the Administration link available only to the system administrator, as shown in Figure A–1.
Table A–1  Pretty URLs to Pages for Administering WebCenter Portal

<table>
<thead>
<tr>
<th>Target</th>
<th>Pretty URL Syntax</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Settings page in WebCenter Portal administration</td>
<td><a href="http://host:port/webcenter/portal/builder/administration">http://host:port/webcenter/portal/builder/administration</a></td>
</tr>
<tr>
<td></td>
<td><a href="http://host:port/webcenter/portal/builder/administration/general">http://host:port/webcenter/portal/builder/administration/general</a></td>
</tr>
<tr>
<td></td>
<td>Shortcut URLs:</td>
</tr>
<tr>
<td></td>
<td><a href="http://host:port/webcenter/portal/admin">http://host:port/webcenter/portal/admin</a></td>
</tr>
<tr>
<td></td>
<td><a href="http://host:port/webcenter/portal/admin/general">http://host:port/webcenter/portal/admin/general</a></td>
</tr>
<tr>
<td>Permission required: Application-level Portal Server-Manage Configuration</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Shortcut URLs:</td>
</tr>
<tr>
<td></td>
<td><a href="http://host:port/webcenter/portal/admin/roles">http://host:port/webcenter/portal/admin/roles</a></td>
</tr>
<tr>
<td></td>
<td><a href="http://host:port/webcenter/portal/admin/users">http://host:port/webcenter/portal/admin/users</a></td>
</tr>
<tr>
<td>Permission required: Application-level Portal Server-Manage All</td>
<td></td>
</tr>
<tr>
<td>Tools and Services page in WebCenter Portal administration</td>
<td><a href="http://host:port/webcenter/portal/builder/administration/tools">http://host:port/webcenter/portal/builder/administration/tools</a></td>
</tr>
<tr>
<td></td>
<td>Shortcut URLs:</td>
</tr>
<tr>
<td></td>
<td><a href="http://host:port/webcenter/portal/admin/services">http://host:port/webcenter/portal/admin/services</a></td>
</tr>
<tr>
<td></td>
<td><a href="http://host:port/webcenter/portal/admin/tools">http://host:port/webcenter/portal/admin/tools</a></td>
</tr>
<tr>
<td>Permission required: Application-level Portal Server-Manage Configuration</td>
<td></td>
</tr>
</tbody>
</table>
Table A–1 (Cont.) Pretty URLs to Pages for Administering WebCenter Portal

<table>
<thead>
<tr>
<th>Target</th>
<th>Pretty URL Syntax</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>System Pages page in WebCenter Portal administration</strong></td>
<td>Listing of all system pages:</td>
</tr>
<tr>
<td></td>
<td><a href="http://host:port/webcenter/portal/builder/administration/systempages">http://host:port/webcenter/portal/builder/administration/systempages</a></td>
</tr>
<tr>
<td></td>
<td>Shortcut URL:</td>
</tr>
<tr>
<td></td>
<td><a href="http://host:port/webcenter/portal/admin/systempages">http://host:port/webcenter/portal/admin/systempages</a></td>
</tr>
<tr>
<td></td>
<td>Specific system page:</td>
</tr>
<tr>
<td></td>
<td><a href="http://host:port/webcenter/portal/system/pageName">http://host:port/webcenter/portal/system/pageName</a></td>
</tr>
<tr>
<td></td>
<td>(see Section A.2, &quot;Pretty URLs for System Pages&quot;)</td>
</tr>
<tr>
<td></td>
<td>Permission required: Application-level Portal Server-Manage Configuration</td>
</tr>
<tr>
<td><strong>Business Role Pages page in WebCenter Portal administration</strong></td>
<td>Listing of all business role pages:</td>
</tr>
<tr>
<td></td>
<td><a href="http://host:port/webcenter/portal/builder/administration/businessrolepages">http://host:port/webcenter/portal/builder/administration/businessrolepages</a></td>
</tr>
<tr>
<td></td>
<td>Shortcut URL:</td>
</tr>
<tr>
<td></td>
<td><a href="http://host:port/webcenter/portal/admin/brpages">http://host:port/webcenter/portal/admin/brpages</a></td>
</tr>
<tr>
<td></td>
<td>Specific business role page:</td>
</tr>
<tr>
<td></td>
<td><a href="http://host:port/webcenter/portal/system/pageName">http://host:port/webcenter/portal/system/pageName</a></td>
</tr>
<tr>
<td></td>
<td>Permission required: Application-level Portal Server-Manage Configuration</td>
</tr>
<tr>
<td><strong>Personal Pages page in WebCenter Portal administration</strong></td>
<td><a href="http://host:port/webcenter/portal/builder/administration/personalpages">http://host:port/webcenter/portal/builder/administration/personalpages</a></td>
</tr>
<tr>
<td></td>
<td>Shortcut URL:</td>
</tr>
<tr>
<td></td>
<td><a href="http://host:port/webcenter/portal/admin/personalpages">http://host:port/webcenter/portal/admin/personalpages</a></td>
</tr>
<tr>
<td></td>
<td>Permission required: Application-level Portal Server-Manage Configuration</td>
</tr>
<tr>
<td><strong>Device Settings page in WebCenter Portal administration</strong></td>
<td><a href="http://host:port/webcenter/portal/builder/administration/device">http://host:port/webcenter/portal/builder/administration/device</a></td>
</tr>
<tr>
<td></td>
<td>Permission required: Application-level Portal Server-Manage Configuration</td>
</tr>
</tbody>
</table>

A.2 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. For URLs to portal-specific system pages, see Table A–7, "Pretty URLs to Pages in a Specified Portal".

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.
## Table A–2  Pretty URLs to Application-Level System Pages

<table>
<thead>
<tr>
<th>Target</th>
<th>Pretty URL Syntax</th>
</tr>
</thead>
<tbody>
<tr>
<td>Activities</td>
<td><a href="http://host:port/webcenter/portal/system/Activities">http://host:port/webcenter/portal/system/Activities</a></td>
</tr>
<tr>
<td>Activity Stream</td>
<td><a href="http://host:port/webcenter/portal/system/Activity+Stream">http://host:port/webcenter/portal/system/Activity+Stream</a></td>
</tr>
<tr>
<td>Analytics</td>
<td><a href="http://host:port/webcenter/portal/system/Analytics">http://host:port/webcenter/portal/system/Analytics</a></td>
</tr>
<tr>
<td>Announcements</td>
<td><a href="http://host:port/webcenter/portal/system/Announcements">http://host:port/webcenter/portal/system/Announcements</a></td>
</tr>
<tr>
<td>Discussions</td>
<td><a href="http://host:port/webcenter/portal/system/Discussions">http://host:port/webcenter/portal/system/Discussions</a></td>
</tr>
<tr>
<td>Documents</td>
<td><a href="http://host:port/webcenter/portal/system/Documents">http://host:port/webcenter/portal/system/Documents</a></td>
</tr>
<tr>
<td>Error Encountered</td>
<td><a href="http://host:port/webcenter/portal/system/Error+Encountered">http://host:port/webcenter/portal/system/Error+Encountered</a></td>
</tr>
<tr>
<td>Events</td>
<td><a href="http://host:port/webcenter/portal/system/Events">http://host:port/webcenter/portal/system/Events</a></td>
</tr>
<tr>
<td>Lists</td>
<td><a href="http://host:port/webcenter/portal/system/Lists">http://host:port/webcenter/portal/system/Lists</a></td>
</tr>
</tbody>
</table>
Pretty URLs for Managing All Portals

Table A–2 (Cont.) Pretty URLs to Application-Level System Pages

<table>
<thead>
<tr>
<th>Target</th>
<th>Pretty URL Syntax</th>
</tr>
</thead>
<tbody>
<tr>
<td>Login</td>
<td><a href="http://host:port/webcenter/portal/system/Login">http://host:port/webcenter/portal/system/Login</a></td>
</tr>
<tr>
<td>Members</td>
<td><a href="http://host:port/webcenter/portal/portalName/system/Members">http://host:port/webcenter/portal/portalName/system/Members</a></td>
</tr>
<tr>
<td>No Pages Accessible</td>
<td><a href="http://host:port/webcenter/portal/system/No+Pages+Accessible">http://host:port/webcenter/portal/system/No+Pages+Accessible</a></td>
</tr>
<tr>
<td>Page Not Found</td>
<td><a href="http://host:port/webcenter/portal/system/Page+Not+Found">http://host:port/webcenter/portal/system/Page+Not+Found</a></td>
</tr>
<tr>
<td>Page Viewer</td>
<td><a href="http://host:port/webcenter/portal/system/Page+Viewer">http://host:port/webcenter/portal/system/Page+Viewer</a></td>
</tr>
<tr>
<td>Portal Not Found</td>
<td><a href="http://host:port/webcenter/portal/system/Portal+Not+Found">http://host:port/webcenter/portal/system/Portal+Not+Found</a></td>
</tr>
<tr>
<td>Portals</td>
<td><a href="http://host:port/webcenter/portal/system/Portals">http://host:port/webcenter/portal/system/Portals</a></td>
</tr>
<tr>
<td>Portal Templates</td>
<td><a href="http://host:port/webcenter/portal/system/Portal+Templates">http://host:port/webcenter/portal/system/Portal+Templates</a></td>
</tr>
<tr>
<td>Profile</td>
<td><a href="http://host:port/webcenter/portal/system/Profile">http://host:port/webcenter/portal/system/Profile</a></td>
</tr>
<tr>
<td></td>
<td>Note: this URL accesses the current user's Profile page.</td>
</tr>
<tr>
<td>Search</td>
<td><a href="http://host:port/webcenter/portal/system/Search">http://host:port/webcenter/portal/system/Search</a></td>
</tr>
<tr>
<td>Self-Registration</td>
<td><a href="http://host:port/webcenter/portal/system/Self-Registration">http://host:port/webcenter/portal/system/Self-Registration</a></td>
</tr>
<tr>
<td></td>
<td>Note: Accessing the Self-Registration page using the pretty URL is not supported.</td>
</tr>
<tr>
<td>Self-Service Membership</td>
<td><a href="http://host:port/webcenter/portal/system/Self-Service+Membership">http://host:port/webcenter/portal/system/Self-Service+Membership</a></td>
</tr>
<tr>
<td>Tag Center</td>
<td><a href="http://host:port/webcenter/portal/system/Tag+Center">http://host:port/webcenter/portal/system/Tag+Center</a></td>
</tr>
<tr>
<td>Task Flow Editor</td>
<td><a href="http://host:port/webcenter/portal/system/Task+Flow+Editor">http://host:port/webcenter/portal/system/Task+Flow+Editor</a></td>
</tr>
<tr>
<td>Unauthorized</td>
<td><a href="http://host:port/webcenter/portal/system/Unauthorized">http://host:port/webcenter/portal/system/Unauthorized</a></td>
</tr>
<tr>
<td>Unavailable</td>
<td><a href="http://host:port/webcenter/portal/system/Unavailable">http://host:port/webcenter/portal/system/Unavailable</a></td>
</tr>
<tr>
<td>User Profile</td>
<td><a href="http://host:port/webcenter/portal/system/User+Profile">http://host:port/webcenter/portal/system/User+Profile</a></td>
</tr>
<tr>
<td></td>
<td>To access the User Profile page for an individual user, see Table A–5, &quot;Pretty URLs to User Profiles in the Home Portal&quot;</td>
</tr>
</tbody>
</table>

A.3 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.
Pretty URLs for Managing All Portals

**Figure A–3  Pages for Managing All Portals**

![Oracle WebCenter Portal > Portal Builder](image)

<table>
<thead>
<tr>
<th>All Portals</th>
<th>All Portals</th>
</tr>
</thead>
<tbody>
<tr>
<td><a href="#">Ports</a></td>
<td><a href="#">Administration</a></td>
</tr>
<tr>
<td><a href="#">Shared Assets</a></td>
<td><a href="#">Attributes</a></td>
</tr>
<tr>
<td><a href="#">Portal Templates</a></td>
<td><a href="#">Preferences</a></td>
</tr>
</tbody>
</table>

**Table A–3  Pretty URLs to Pages for Managing All Portals**

<table>
<thead>
<tr>
<th>Target</th>
<th>Pretty URL Syntax</th>
</tr>
</thead>
<tbody>
<tr>
<td>Portals page</td>
<td><a href="http://host:port/webcenter/portal/builder/portals">http://host:port/webcenter/portal/builder/portals</a></td>
</tr>
<tr>
<td></td>
<td>All portals available to you (All Portals page):</td>
</tr>
<tr>
<td></td>
<td><a href="http://host:port/webcenter/portal/builder/portals/all">http://host:port/webcenter/portal/builder/portals/all</a></td>
</tr>
<tr>
<td>Moderated Portals page:</td>
<td><a href="http://host:port/webcenter/portal/builder/portals/moderated">http://host:port/webcenter/portal/builder/portals/moderated</a></td>
</tr>
<tr>
<td>Joined Portals page:</td>
<td><a href="http://host:port/webcenter/portal/builder/portals/joined">http://host:port/webcenter/portal/builder/portals/joined</a></td>
</tr>
<tr>
<td>Public Portals page:</td>
<td><a href="http://host:port/webcenter/portal/builder/portals/public">http://host:port/webcenter/portal/builder/portals/public</a></td>
</tr>
<tr>
<td>Discoverable Portals page:</td>
<td><a href="http://host:port/webcenter/portal/builder/portals/discoverable">http://host:port/webcenter/portal/builder/portals/discoverable</a></td>
</tr>
<tr>
<td>Available actions are dependent on permissions:</td>
<td></td>
</tr>
<tr>
<td>- Application-level Portal Server-View shows list of portals with limited actions.</td>
<td></td>
</tr>
<tr>
<td>- Portal-level Manage Security and Configuration or Manage Configuration: exposes Administration link for portals for which the permission is given.</td>
<td></td>
</tr>
<tr>
<td>- Application-level Portal Server-Manage Configuration: exposes all actions on all portals, including import/export.</td>
<td></td>
</tr>
</tbody>
</table>

| Create Portal page | http://host:port/webcenter/portal/builder/portals/newportal |
|                    | Permission required: Application-level Portals-Create Portals |

| Shared Assets page for all portals | http://host:port/webcenter/portal/builder/assets |
|                                    | Permission required: Application-level resource type-Edit or resource type-Create |
Pretty URLs for the Default Portal

A.4 Pretty URLs for the Default Portal

By default, users see the Home portal when they log in, but the system administrator can configure the initial landing page to be a specific portal or page. For more information about the default portal, see the "Choosing a Default Start (or Landing) Page" section 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

<table>
<thead>
<tr>
<th>Target</th>
<th>Pretty URL Syntax</th>
</tr>
</thead>
<tbody>
<tr>
<td>Default portal</td>
<td><a href="http://host:port/webcenter/">http://host:port/webcenter/</a></td>
</tr>
<tr>
<td></td>
<td><a href="http://host:port/webcenter/portal">http://host:port/webcenter/portal</a></td>
</tr>
<tr>
<td></td>
<td>Note: Pretty URLs cannot be used to navigate directly to a specific page in the default portal.</td>
</tr>
</tbody>
</table>
A.5 Pretty URLs for User Profiles

Table A–5 lists and describes the syntax for the pretty URLs that provide easy access to user profiles.

You can view a profile, including your own, by clicking a user name wherever you see it in WebCenter Portal. Depending on where you click in the portal, you either see a brief, popup view of the user profile or you see a full profile view on the WebCenter Portal Profile page. In the Home portal (Figure A–4), click the Profile tab to view your own profile.

For more information, see the "Viewing a Profile" section in Using Oracle WebCenter Portal.

Figure A–4 Home Portal
Table A–5  Pretty URLs to User Profiles in the Home Portal

<table>
<thead>
<tr>
<th>Target</th>
<th>Pretty URL Syntax</th>
</tr>
</thead>
<tbody>
<tr>
<td>Profile page for the specified user or (if user name omitted) current user in the context of the Home portal</td>
<td><a href="http://host:port/webcenter/portal/profile/username">http://host:port/webcenter/portal/profile/username</a></td>
</tr>
<tr>
<td></td>
<td><a href="http://host:port/webcenter/portal/profile">http://host:port/webcenter/portal/profile</a></td>
</tr>
<tr>
<td>Profile page for the specified user or (if user name omitted) current user in the context of the specified portal</td>
<td><a href="http://host:port/webcenter/portal/portalName/profile/username">http://host:port/webcenter/portal/portalName/profile/username</a></td>
</tr>
<tr>
<td></td>
<td><a href="http://host:port/webcenter/portal/portalName/profile">http://host:port/webcenter/portal/portalName/profile</a></td>
</tr>
</tbody>
</table>

A.6 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 for Current User

WEBCENTER PORTAL > Home Portal

Activities  Documents  Portals  Profile

What's on your mind?

Attach: File  Link

Recent Activities

Ari Spice has created the portal My LED company
Comment  Like  Share  Yesterday
Pretty URLs for Pages in a Specified Portal

Table A–6 Pretty URLs to Pages in the Home Portal

<table>
<thead>
<tr>
<th>Target</th>
<th>Pretty URL Syntax</th>
</tr>
</thead>
</table>
| 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 |
| 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 |

A.7 Pretty URLs for Pages in a Specified Portal

Table A–7 lists and describes the syntax for the pretty URLs you can use to access pages associated with a specified portal.

Note: Entering a URL to navigate to another portal page from the page editor may display unexpected results. Close the page editor to exit edit mode before navigating to another page using its URL.

Through the WebCenter Portal user interface, from the Portals menu, select Browse Portals to display the Portals page in the Home portal (Figure A–6):

Figure A–6 Accessing Administration for a Portal

- Click a portal name to access the Home page of the portal (Figure A–7).

Figure A–7 Home Page of a Portal

Note: Click the Create icon to create a note.
Right-click a portal, and select **Administration** to access the portal administration pages (Figure A–8).

**Figure A–8  Administering a Portal**

### Portal Information
- **Title**: My LED company
- **Description**:
- **Keywords**: portal

### Portal Details
- **Name**: MyLEDcompany
- **Portal URL**: http://slc01mcw8888/led
- **Internal ID**: s0ae1f42fceede487a
- **Members**: 7
- **Last Activity**: 1 day ago
- **Created**: 1 day ago by ari
### Table A–7  Pretty URLs to Pages in a Specified Portal

<table>
<thead>
<tr>
<th>Target</th>
<th>Pretty URL Syntax</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home page of specified portal (first navigable node in the navigation model)</td>
<td><a href="http://host:port/webcenter/portal/portalName">http://host:port/webcenter/portal/portalName</a></td>
</tr>
<tr>
<td>Profile page for the specified user or (if username omitted) current user in the context of the specified portal</td>
<td><a href="http://host:port/webcenter/portal/portalName/profile/userName">http://host:port/webcenter/portal/portalName/profile/userName</a> <a href="http://host:port/webcenter/portal/portalName/profile">http://host:port/webcenter/portal/portalName/profile</a></td>
</tr>
</tbody>
</table>
| 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 your portal using pretty URLs. Note that multiple pages in a portal may have the same URL. The target page that a URL displays is based on the rules specified below.  

**Note:** If your portal is based on a portal (space) template from a prior release of WebCenter Portal (for example, if you imported a space from a prior release), you can access only parent pages through pretty URLs. Note that in this case, there is no support for hierarchical pages (subpages), or page variants.  

For information about pages and subpages, see Section 12.2, "Creating Pages or Subpages in a Portal" and Section 13.3, "Adjusting Page Order and Hierarchy in the Portal Navigation."

You can use either of the following pretty URLs to display a specific portal page:
- http://host:port/webcenter/portal/portalName/page/pageName displays the first page named pageName found in the page hierarchy of the specified portal. This is the page display name, as specified by its Name property.  
- http://host:port/webcenter/portal/portalName/pageIdentifier where pageIdentifier can be any of the following, searched for by WebCenter Portal in this order:
  1. **ID.** To find the ID of a page, see Section 13.16, "Setting Navigation Properties and Display Options for a Page." If the target is a subpage, include the ID(s) of the parent page(s) in the path.  
  2. **External ID.** To find the external ID of a page, see Section 13.16, "Setting Navigation Properties and Display Options for a Page."  
  3. **Name.** To find the Name of a page, see Section 13.7, "Renaming a Page." This is the page display name, as specified by the Name property and exposed in the user interface. If the target is a subpage, you can optionally include the name(s) of the parent page(s) in the path. |
Example:

Portal name: Philatelists
A page in portal Philatelists:
- ID: presPage
- External ID: 1800
- Name: Presidents

A subpage to parent page Presidents:
- ID: lincPage
- External ID: 1865
- Name: Lincoln

The following pretty URLs display the subpage named Lincoln:
- http://host:port/webcenter/portal/Philatelists/page/Lincoln (finds first page named Lincoln in page hierarchy)
- http://host:port/webcenter/portal/Philatelists/presPage/lincPage (using ID, including parent page ID)
- http://host:port/webcenter/portal/Philatelists/1865 (using external ID)
- http://host:port/webcenter/portal/Philatelists/Presidents/Lincoln (using display name, including parent page display name)
- http://host:port/webcenter/portal/Philatelists/Lincoln (using display name, excluding parent page display name)

More examples:

Tool Console page (for full list, see Tools and Services page, below):
- http://host:port/webcenter/portal/Philatelists/Discussions
- or http://host:port/webcenter/portal/Philatelists/system/Discussions

System page:
- http://host:port/webcenter/portal/Philatelists/system/Search

Business role page:
- http://host:port/webcenter/portal/Philatelists/SalesForecast
- or http://host:port/webcenter/portal/Philatelists/page/SalesForecast

### Administering a Portal

<table>
<thead>
<tr>
<th>Target</th>
<th>Pretty URL Syntax</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overview page in portal administration for specified portal</td>
<td><a href="http://host:port/webcenter/portal/portalName/admin">http://host:port/webcenter/portal/portalName/admin</a></td>
</tr>
<tr>
<td>Permission required: Portal-level Manage Configuration</td>
<td><a href="http://host:port/webcenter/portal/portalName/admin/overview">http://host:port/webcenter/portal/portalName/admin/overview</a></td>
</tr>
<tr>
<td>Settings page in portal administration for specified portal</td>
<td><a href="http://host:port/webcenter/portal/portalName/admin/settings">http://host:port/webcenter/portal/portalName/admin/settings</a></td>
</tr>
<tr>
<td>Permission required: Portal-level Manage Configuration</td>
<td></td>
</tr>
<tr>
<td>Pages page in portal administration for specified portal</td>
<td><a href="http://host:port/webcenter/portal/portalName/admin/pages">http://host:port/webcenter/portal/portalName/admin/pages</a></td>
</tr>
<tr>
<td>Permission required: Portal-level Manage Configuration and Basic Services: Edit Page Access and Structure or higher</td>
<td></td>
</tr>
<tr>
<td>Assets page in portal administration for specified portal</td>
<td><a href="http://host:port/webcenter/portal/portalName/admin/assets">http://host:port/webcenter/portal/portalName/admin/assets</a></td>
</tr>
<tr>
<td>Permission required: Portal-level Manage Configuration and Resources-Edit Resources or higher</td>
<td></td>
</tr>
</tbody>
</table>
### Table A–7  (Cont.) Pretty URLs to Pages in a Specified Portal

<table>
<thead>
<tr>
<th>Target</th>
<th>Pretty URL Syntax</th>
<th>Permission required: Portal-level Manage Configuration</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Attributes</strong> page in portal administration for specified portal</td>
<td><a href="http://host:port/webcenter/portal/portalName/admin/attributes">http://host:port/webcenter/portal/portalName/admin/attributes</a></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Permission required: Portal-level Manage Configuration</td>
<td></td>
</tr>
<tr>
<td><strong>Security</strong> page in portal administration for specified portal</td>
<td><a href="http://host:port/webcenter/portal/portalName/admin/roles">http://host:port/webcenter/portal/portalName/admin/roles</a></td>
<td></td>
</tr>
<tr>
<td></td>
<td><a href="http://host:port/webcenter/portal/portalName/admin/members">http://host:port/webcenter/portal/portalName/admin/members</a></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Permission required: Portal-level Manage Configuration and Administration: Manage Membership</td>
<td></td>
</tr>
<tr>
<td><strong>Tools and Services</strong> page in portal administration for specified portal</td>
<td><a href="http://host:port/webcenter/portal/portalName/admin/services">http://host:port/webcenter/portal/portalName/admin/services</a></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Permission required: Portal-level Manage Configuration</td>
<td></td>
</tr>
<tr>
<td></td>
<td>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:</td>
<td></td>
</tr>
<tr>
<td></td>
<td><a href="http://host:port/webcenter/portal/portalName/Announcements">http://host:port/webcenter/portal/portalName/Announcements</a></td>
<td></td>
</tr>
<tr>
<td></td>
<td><a href="http://host:port/webcenter/portal/portalName/Discussions">http://host:port/webcenter/portal/portalName/Discussions</a></td>
<td></td>
</tr>
<tr>
<td></td>
<td><a href="http://host:port/webcenter/portal/portalName/Documents">http://host:port/webcenter/portal/portalName/Documents</a></td>
<td></td>
</tr>
<tr>
<td></td>
<td><a href="http://host:port/webcenter/portal/portalName/Events">http://host:port/webcenter/portal/portalName/Events</a></td>
<td></td>
</tr>
<tr>
<td></td>
<td><a href="http://host:port/webcenter/portal/portalName/Lists">http://host:port/webcenter/portal/portalName/Lists</a></td>
<td></td>
</tr>
<tr>
<td></td>
<td><a href="http://host:port/webcenter/portal/portalName/Search">http://host:port/webcenter/portal/portalName/Search</a></td>
<td></td>
</tr>
<tr>
<td></td>
<td><a href="http://host:port/webcenter/portal/portalName/Tags">http://host:port/webcenter/portal/portalName/Tags</a></td>
<td></td>
</tr>
<tr>
<td><strong>Subportals</strong> page in portal administration for specified portal</td>
<td><a href="http://host:port/webcenter/portal/portalName/admin/subportals">http://host:port/webcenter/portal/portalName/admin/subportals</a></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Permission required: Portal-level Manage Configuration</td>
<td></td>
</tr>
<tr>
<td><strong>System Pages</strong> page in portal administration for specified portal</td>
<td><a href="http://host:port/webcenter/portal/portalName/admin/systempages">http://host:port/webcenter/portal/portalName/admin/systempages</a></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Permission required: Portal-level Manage Configuration</td>
<td></td>
</tr>
<tr>
<td></td>
<td>While this page provides access to all system pages for the specified portal, you can also access the individual system pages through either of the following pretty URLs:</td>
<td></td>
</tr>
<tr>
<td></td>
<td><a href="http://host:port/webcenter/portal/portalName/systemPageName">http://host:port/webcenter/portal/portalName/systemPageName</a></td>
<td></td>
</tr>
<tr>
<td></td>
<td><a href="http://host:port/webcenter/portal/portalName/system/systemPageName">http://host:port/webcenter/portal/portalName/system/systemPageName</a></td>
<td></td>
</tr>
<tr>
<td><strong>Device Settings</strong> page in portal administration for specified portal</td>
<td><a href="http://host:port/webcenter/portal/builder/portals/admin/portalName/device">http://host:port/webcenter/portal/builder/portals/admin/portalName/device</a></td>
<td>Permission required: Portal-level Manage Configuration</td>
</tr>
<tr>
<td></td>
<td>Permission required: Portal-level Manage Configuration</td>
<td></td>
</tr>
</tbody>
</table>
This appendix describes the different portal components that are available to add to your pages and page templates.

This appendix includes the following topics:

- Section B.1, "About Portal Components"
- Section B.2, "Accessing Portal Component Properties"

See Table B–1, "WebCenter Portal Components" for a listing of all components.

### B.1 About Portal Components

Portal components are prepackaged, fully functional application widgets or tags, such as menus and links, that are available for adding to pages and, most notably, to page templates. Out-of-the-box, they are available in the Default Page Template Catalog. Each component provides a ready-to-go piece of the WebCenter Portal user interface (UI). For information about working with portal components, see Chapter 14, "Working with Resource Catalog Components on a Page."

Portal components have associated properties that you can use to refine the appearance and behavior of a component instance.

Table B–1 links to the remaining sections in this appendix. It lists all available portal components and links to more information about each one. Additionally, it provides the XML code for placing the component in a resource catalog in an application built using WebCenter Portal Framework and the tag to use to place the component on a .jspx page.

#### Table B–1 WebCenter Portal Components

<table>
<thead>
<tr>
<th>A to Create Po</th>
<th>Create Su to Leave</th>
<th>Login to Print</th>
<th>Privacy to U</th>
</tr>
</thead>
<tbody>
<tr>
<td>About Portal</td>
<td>Create Subportal</td>
<td>Login</td>
<td>Privacy URL</td>
</tr>
<tr>
<td>About WebCenter</td>
<td>Current User Profile</td>
<td>Logout</td>
<td>RSS</td>
</tr>
<tr>
<td>Add to Favorites</td>
<td>Edit Page</td>
<td>Mail Members</td>
<td>Search</td>
</tr>
<tr>
<td>Administration</td>
<td>Favorites Menu</td>
<td>Mail Portal Moderators</td>
<td>Self-Registration</td>
</tr>
<tr>
<td>Change Membership</td>
<td>Global Help</td>
<td>Manage Pages</td>
<td>Share Resource</td>
</tr>
<tr>
<td>Contact Administration</td>
<td>Home Portal</td>
<td>Page Links</td>
<td>Status Indicator</td>
</tr>
<tr>
<td>Copyright Message</td>
<td>Invite People as Connection</td>
<td>Parent Portal</td>
<td>Subscription Preferences</td>
</tr>
<tr>
<td>Create Page</td>
<td>Join Portal</td>
<td>Portal Switcher</td>
<td>Tags</td>
</tr>
<tr>
<td>Create Portal</td>
<td>Leave Portal</td>
<td>Print Preview</td>
<td>User Preferences</td>
</tr>
</tbody>
</table>

Portal Components   B-1
See Also:  Section 14.3, "Modifying Component Properties"

B.2 Accessing Portal Component Properties

You can access portal component properties in the page editor Structure view.

**Note:** When you enter most types of property values in the Component Properties dialog and then click **Apply**, the dialog remains open. With values other than expected value types, the dialog closes, and the page is refreshed to reflect the new value. For example, if a component takes a `java.util.ArrayList` of `java.awt.Color` classes, then the Component Properties dialog closes and Composer does a full-page-refresh.

To access portal component properties:

1. Edit the page or page template that includes the portal component.

   **See Also:**  Section 21.4, "Editing a Page Template"

2. In Composer, click the **Select** tab.

3. Select the portal component on the page, and click **Edit Component** to open the Component Properties dialog.

4. Revise property values as required.

   **Note:** When you enter EL on the generic **Display Options** tab in the Component Properties 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 14–1, "Display Options Properties".

   If you need EL assistance, an application developer can provide an EL expression; see the "Expression Language Expressions" appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

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

5. Click **Save** and then **Close** to exit Composer.

   **Tip:** You can try out a change by clicking **Apply** first and observing the result on the page.

B.3 About Portal

The About Portal component is a link that opens a dialog with information about the current portal (Figure B–1).

**Figure B–1  About Portal Component**

![About Portal](https://example.com/about.png)
Every portal has associated information, called *metadata*. Portal metadata includes such information as display name, internal identification (GUID), 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:** For information about the About Portal dialog, see the "Viewing Information About a Portal" section in *Using Oracle WebCenter Portal*.

This section lists and describes the Display Options associated with the About Portal component. Additionally, it provides the tag that invokes this component on a .jspx page and the XML code that defines this component in a resource catalog.

This section includes the following subsections:

- Section B.3.1, "About Portal Component Display Options"
- Section B.3.2, "About Portal Component Tag and XML"

### B.3.1 About Portal Component Display Options

**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 Section 14.3.6, "Working with Style and Content Style Properties."

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Depressed Icon</td>
<td>A URL or relative path to an icon that appears when the component is clicked</td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
<tr>
<td>Disabled Icon</td>
<td>A URL or relative path to an image that appears when the component is disabled</td>
</tr>
<tr>
<td></td>
<td>See Depressed Icon for more information.</td>
</tr>
<tr>
<td>Display Type</td>
<td>The render mode of the component:</td>
</tr>
<tr>
<td></td>
<td>- <strong>link</strong>—Show the component as a link</td>
</tr>
<tr>
<td></td>
<td>- <strong>button</strong>—Show the component as a command button</td>
</tr>
<tr>
<td>Hover Icon</td>
<td>A URL or relative path to an icon that appears when users hover their mouse pointers over the component</td>
</tr>
<tr>
<td></td>
<td>See Depressed Icon for more information.</td>
</tr>
<tr>
<td>Icon</td>
<td>A URL or relative path to an icon to represent the active component</td>
</tr>
<tr>
<td></td>
<td>See Depressed Icon for more information.</td>
</tr>
<tr>
<td>Icon Position</td>
<td>A selection of options for placement of the link's associated icon:</td>
</tr>
<tr>
<td></td>
<td>- <strong>leading</strong>—The icon is positioned at the start of its associated text</td>
</tr>
<tr>
<td></td>
<td>- <strong>trailing</strong>—The icon is positioned at the end of its associated text</td>
</tr>
</tbody>
</table>
The following tag is used to render the About Portal component on a .jspx page:

```xml
<wcdc:aboutSpaceLink id="" xmlns:wcdc="http://xmlns.oracle.com/webcenter/spaces/taglib" text="#{uib_o_w_w_r_WebCenter.TITLE_SHOW_GROUP_SPACE_INFO}"/>
```

Example B–1 provides the XML code that represents the component in the resource catalog file (SiteTemplateCatalog.xml) in a Portal Framework application.

### Example B–1 XML Code for the About Portal Component

```xml
<tag>
   <name>aboutSpaceLink</name>
   <tag-class>oracle.webcenter.webcenterapp.internal.view.taglib.
   AboutSpaceLinkTag</tag-class>
   <body-content>empty</body-content>
   <attribute>
      <name>id</name>
   </attribute>
   <attribute>
      <name>rendered</name>
      <deferred-value>
         <type>boolean</type>
      </deferred-value>
   </attribute>
   <attribute>
      <name>binding</name>
      <deferred-value/>
   </attribute>
   <attribute>
      <name>clientComponent</name>
      <deferred-value>
         <type>boolean</type>
      </deferred-value>
   </attribute>
</tag>
```

### B.3.2 About Portal Component Tag and XML

The following tag is used to render the About Portal component on a .jspx page:

```xml
<wcdc:aboutSpaceLink id="" xmlns:wcdc="http://xmlns.oracle.com/webcenter/spaces/taglib" text="#{uib_o_w_w_r_WebCenter.TITLE_SHOW_GROUP_SPACE_INFO}"/>
```

**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.
B.4 About WebCenter

The About WebCenter component is a link that opens a dialog with application version and copyright information (Figure B–2).

![Figure B–2 About WebCenter Component](image)

This section lists and describes the Display Options associated with the About WebCenter component. Additionally, it provides the tag that invokes this component on a .jspx page and the XML code that defines this component in a resource catalog.

This section includes the following subsections:

- Section B.4.1, "About WebCenter Component Display Options"
- Section B.4.2, "About WebCenter Component Tag and XML"

### B.4.1 About WebCenter Component Display Options

The About WebCenter component shares many of the same Display Options properties with the About Portal component. Table B–3 lists and describes the Display Options properties associated with the About WebCenter component that are not included in Table B–2, "About Portal Component Display Options" or that have different default values.

See Also: The About WebCenter component has Style properties you can use to change the component's look and feel. For more information, see Section 14.3.6, "Working with Style and Content Style Properties."

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Short Desc</td>
<td>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}.</td>
</tr>
<tr>
<td>Text</td>
<td>Display text for the component. The default is About Portals. The default is the rendered value of the EL expression #{uib_o_w_w_r/WebCenter.GLOBAL_LINK_ABOUT}.</td>
</tr>
<tr>
<td>Type</td>
<td>The component type. The default is aboutWebcenter.</td>
</tr>
</tbody>
</table>
B.4.2 About WebCenter Component Tag and XML

The following tag is used to render the About WebCenter component on a .jspx page:

```xml
<wcdc:spacesAction id="#" xmlns:wcdc="http://xmlns.oracle.com/webcenter/spaces/taglib" type="aboutWebcenter" displayType="link" text="#{uib_o_w_w_r_WebCenter.GLOBAL_LINK_ABOUT}" shortDesc="#{uib_o_w_w_r_WebCenter.GLOBAL_LINK_ABOUT_DESC}" inlineStyle="white-space:nowrap;"/>
```

Example B–2 provides the XML code that represents the component in the resource catalog file (SiteTemplateCatalog.xml) in a Portal Framework application.

**Example B–2  XML Code for the About WebCenter Component**

```xml
<tag>
  <name>spacesAction</name>
  <tag-class>oracle.webcenter.webcenterapp.internal.view.taglib.SpacesActionTag</tag-class>
  <body-content>empty</body-content>
  <attribute>
    <name>id</name>
  </attribute>
  <attribute>
    <name>rendered</name>
    <deferred-value>
      <type>boolean</type>
    </deferred-value>
  </attribute>
  <attribute>
    <name>binding</name>
    <deferred-value/>
  </attribute>
  <attribute>
    <name>clientComponent</name>
    <deferred-value>
      <type>boolean</type>
    </deferred-value>
  </attribute>
  <attribute>
    <name>customizationId</name>
    <deferred-value/>
  </attribute>
  <attribute>
    <name>depressedIcon</name>
    <required>false</required>
    <deferred-value/>
  </attribute>
  <attribute>
    <name>disabled</name>
    <required>false</required>
  </attribute>
</tag>
```

**See Also:** Display Options properties in the Component Properties dialog provide 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 the "Expression Language Expressions” appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.
B.5 Add to Favorites

The Add to Favorites component is a link that enables users to add an item to their Favorites menu (Figure B–3).
Figure B–3  Add to Favorites Component

For example, users can use this component to add a favorite page, wiki, blog, list, event, task, template, to their Favorites menu.

This section lists and describes the Display Options associated with the Add to Favorites component. Additionally, it provides the tag that invokes this component on a .jspx page and the XML code that defines this component in a resource catalog.

This section includes the following subsections:

■ Section B.5.1, "Add to Favorites Component Display Options"
■ Section B.5.2, "Add to Favorites Component Tag and XML"

B.5.1 Add to Favorites Component Display Options

The Add to Favorites component shares many of the same Display Options properties with 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, "About Portal Component Display Options".

See Also: The Add to Favorites component has Style properties you can use to change the component’s look and feel. For more information, see Section 14.3.6, "Working with Style and Content Style Properties."

Table B–4  Add to Favorites Component Display Options

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Favorite Title</td>
<td>The display name of the application object to add as a favorite</td>
</tr>
<tr>
<td>Favorite URL</td>
<td>The URL to use to navigate to the application object</td>
</tr>
</tbody>
</table>
| Short Desc    | A field for entering tooltip text to display when users hover their mouse pointers over the component  
|               | The default is Add To Favorites. The default is the rendered value of the EL expression #{{uib_o_w_w_r_WebCenter.TITLE_ADD_FAVORITE_DIALOG}}. |
| Text          | Display text for the component. The default is Add to Favorites. The default is the rendered value of the EL expression #{{uib_o_w_w_r_WebCenter.TITLE_ADD_FAVORITE_DIALOG}}. |

See Also: Display Options properties in the Component Properties dialog provide access to an Expression Language (EL) editor for entering and testing EL values.

If you need EL assistance, an application developer can provide an EL expression; see the "Expression Language Expressions" appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

B.5.2 Add to Favorites Component Tag and XML

The following tag is used to render the Add to Favorites component on a .jspx page:

```xml
<wcdc:addToFavorites id="#" __taskFlowId="#" xmlns:wcdc="http://xmlns.oracle.com/webcenter/spaces/taglib"
```
Example B-3 provides the XML code that represents the component in the resource catalog file (SiteTemplateCatalog.xml) in a Portal Framework application.

**Example B–3  XML Code for the Add to Favorites Component**

```xml
<tag>
  <name>addToFavorites</name>
  <tag-class>oracle.webcenter.webcenterapp.internal.view.taglib.AddToFavoritesTag</tag-class>
  <body-content>empty</body-content>
  <attribute>
    <name>id</name>
  </attribute>
  <attribute>
    <name>rendered</name>
    <deferred-value>
      <type>boolean</type>
    </deferred-value>
  </attribute>
  <attribute>
    <name>binding</name>
    <deferred-value/>
  </attribute>
  <attribute>
    <name>clientComponent</name>
    <deferred-value>
      <type>boolean</type>
    </deferred-value>
  </attribute>
  <attribute>
    <name>customizationId</name>
    <deferred-value/>
  </attribute>
  <attribute>
    <name>favoriteTitle</name>
    <required>false</required>
    <deferred-value/>
  </attribute>
  <attribute>
    <name>favoriteURL</name>
    <required>false</required>
    <deferred-value/>
  </attribute>
  <attribute>
    <name>depressedIcon</name>
    <required>false</required>
    <deferred-value/>
  </attribute>
  <attribute>
    <name>disabled</name>
    <required>false</required>
    <deferred-value/>
  </attribute>
  <attribute>
    <name>disabledIcon</name>
    <required>false</required>
  </attribute>
</tag>
```
The Administration component is a link that opens the Administration page (Figure B–4).
Figure B–4  Administration Component

Only application administrators can see this link once it is placed on a page or page template.

See Also:  For information about WebCenter Portal administration, see Administering Oracle WebCenter Portal.

This section lists and describes the Display Options associated with the Administration component. Additionally, it provides the tag that invokes this component on a .jspx page and the XML code that defines this component in a resource catalog.

This section includes the following subsections:

- Section B.6.1, "Administration Component Display Options"
- Section B.6.2, "Administration Component Tag and XML"

B.6.1 Administration Component Display Options

The Administration component shares many of the same Display Options properties associated with the About Portal component. Table B–5 lists the properties that have defaults other than those specified in Table B–2, "About Portal Component Display Options".

See Also:  The Administration component has Style properties you can use to change the component's look and feel. For more information, see Section 14.3.6, "Working with Style and Content Style Properties."

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Short Desc</td>
<td>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}.</td>
</tr>
<tr>
<td>Text</td>
<td>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}.</td>
</tr>
<tr>
<td>Type</td>
<td>The component type. The default is administration.</td>
</tr>
</tbody>
</table>
The following tag is used to render the Administration component on a .jspx page:

```xml
  type="administration" displayType="link" inlineStyle="white-space:nowrap;"
  text="#{uib_o_w_w_r_WebCenter.GLOBAL_LINK_ADMINISTRATION}"
  shortDesc="#{uib_o_w_w_r_WebCenter.GLOBAL_LINK_ADMINISTRATION_DESC}"/>
```

In the resource catalog, the Administration component uses the same XML code as the About WebCenter component. For more information, see Section B.4.2, "About WebCenter Component Tag and XML."

**B.7 Change Membership**

The Change Membership component is a link that enables users to request a change to their portal role (Figure B–5).

**Figure B–5 Change Membership Component**

See Also: The "Changing Your Role in a Portal" section in Using Oracle WebCenter Portal.

This section lists and describes the Display Options associated with the Change Membership component. Additionally, it provides the tag that invokes this component on a .jspx page and the XML code that defines this component in a resource catalog.

This section includes the following subsections:

- Section B.7.1, "Change Membership Component Display Options"
- Section B.7.2, "Change Membership Component Tag and XML"

**B.7.1 Change Membership Component Display Options**

The Change Membership component shares many of the same properties with the About Portal component. Table B–6 lists the properties that have defaults other than those specified in Table B–2, "About Portal Component Display Options".

See Also: The Change Membership component has Style properties you can use to change the component's look and feel. For more information, see Section 14.3.6, "Working with Style and Content Style Properties."
### Change Membership Component Tag and XML

The following tag is used to render the Change Membership component on a .jspx page:

```xml
<wcdc:changeSpaceMembership id="" xmlns:wcdc="http://xmlns.oracle.com/webcenter/spaces/taglib" text="#{uib_o_w_s_r_Spaces.COMMUNITY_CHANGE_MEMBERSHIP}" shortDesc="#{uib_o_w_s_r_Spaces.COMMUNITY_CHANGE_MEMBERSHIP}" inlineStyle="white-space:nowrap;
```

Example B–4 provides the XML code that represents the component in the resource catalog file (SiteTemplateCatalog.xml) in a Portal Framework application.

### Example B–4  XML Code for the Change Membership Component

```xml
<tag>
  <name>changeSpaceMembership</name>
  <tag-class>oracle.webcenter.webcenterapp.internal.view.taglib.ChangeSpaceMembershipTag</tag-class>
  <body-content>empty</body-content>
  <attribute>
    <name>id</name>
  </attribute>
  <attribute>
    <name>rendered</name>
    <deferred-value>
      <type>boolean</type>
    </deferred-value>
  </attribute>
  <attribute>
    <name>binding</name>
    <deferred-value/>
  </attribute>
  <attribute>
    <name>clientComponent</name>
    <deferred-value>
      <type>boolean</type>
    </deferred-value>
  </attribute>
</tag>
```

### See Also:
Display Options properties in the Component Properties dialog provide 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 the “Expression Language Expressions” appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

### Table B–6  Change Membership Component Display Options

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Short Desc</td>
<td>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}.</td>
</tr>
<tr>
<td>Text</td>
<td>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}.</td>
</tr>
</tbody>
</table>

See Also: Display Options properties in the Component Properties dialog provide 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 the “Expression Language Expressions” appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.
</attribute>
<attribute>
    <name>customizationId</name>
    <deferred-value/></attribute>
<attribute>
    <name>depressedIcon</name>
    <required>false</required>
    <deferred-value/></attribute>
<attribute>
    <name>disabled</name>
    <required>false</required>
    <deferred-value/></attribute>
<attribute>
    <name>disabledIcon</name>
    <required>false</required>
    <deferred-value/></attribute>
<attribute>
    <name>displayType</name>
    <required>false</required>
    <deferred-value/></attribute>
<attribute>
    <name>hoverIcon</name>
    <required>false</required>
    <deferred-value/></attribute>
<attribute>
    <name>icon</name>
    <required>false</required>
    <deferred-value/></attribute>
<attribute>
    <name>iconPosition</name>
    <required>false</required>
    <deferred-value/></attribute>
<attribute>
    <name>inlineStyle</name>
    <required>false</required>
    <deferred-value/></attribute>
<attribute>
    <name>shortDesc</name>
    <required>false</required>
    <deferred-value/></attribute>
<attribute>
    <name>scopeName</name>
    <required>false</required>
    <deferred-value/></attribute>
<attribute>
    <name>styleClass</name>
    <required>false</required>
    <deferred-value/></attribute>
</attribute>
B.8 Contact Administration

The Contact Administration component is a link that opens a simple popup window in which users can enter and send a workflow notification to members 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 the "Specifying the BPEL Server Hosting WebCenter Portal Workflows" section in *Administering Oracle WebCenter Portal*.

---

**Figure B–6  Contact Administration Component**

This section lists and describes the Display Options associated with the Contact Administration component. Additionally, it provides the tag that invokes this component on a .jspx page and the XML code that defines this component in a resource catalog.

This section includes the following subsections:

- **Section B.8.1, "Contact Administration Component Display Options"**
- **Section B.8.2, "Contact Administration Component Tag and XML"**

### B.8.1 Contact Administration Component Display Options

The Contact Administrator component shares many of the same properties with the About Portal component. Table B–7 lists the properties that have defaults other than those specified in Table B–2, "About Portal Component Display Options".

**See Also:** The Contact Administration component has Style properties you can use to change the component's look and feel. For more information, see Section 14.3.6, "Working with Style and Content Style Properties."
The following tag is used to render the Contact Administration component on a .jspx page:

```xml
type="contactAdmin" displayType="link" inlineStyle="white-space:nowrap;"
text="#{uib_o_w_w_r_WebCenter.CONTACT_ADMINISTRATOR}" shortDesc="#{uib_o_w_w_r_WebCenter.CONTACT_ADMINISTRATOR_DESC}"/>
```

In the resource catalog, the Contact Administration component uses the same XML code as the About WebCenter component. For more information, see Section B.4.2, "About WebCenter Component Tag and XML."

## B.8.2 Contact Administration Component Tag and XML

The following tag is used to render the Contact Administration component on a .jspx page:

```xml
type="contactAdmin" displayType="link" inlineStyle="white-space:nowrap;"
text="#{uib_o_w_w_r_WebCenter.CONTACT_ADMINISTRATOR}" shortDesc="#{uib_o_w_w_r_WebCenter.CONTACT_ADMINISTRATOR_DESC}"/>
```

In the resource catalog, the Contact Administration component uses the same XML code as the About WebCenter component. For more information, see Section B.4.2, "About WebCenter Component Tag and XML."

## B.9 Copyright Message

The Copyright Message component renders the following text string:

Copyright © 2009, 2013, Oracle and/or its affiliates. All rights reserved.

Figure B–7 shows an example of the Copyright Message component rendered within the user interface.

| 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: Display Options properties in the Component Properties dialog provide 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 the "Expression Language Expressions" appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

### See Also:

Display Options properties in the Component Properties dialog provide 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 the "Expression Language Expressions" appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

**Copyright Message**

The Copyright Message component renders the following text string:

Copyright © 2009, 2013, Oracle and/or its affiliates. All rights reserved.

Figure B–7 shows an example of the Copyright Message component rendered within the user interface.

This section lists and describes the Display Options associated with the Copyright component. Additionally, it provides the tag that invokes this component on a .jspx page and the XML code that defines this component in a resource catalog.

This section includes the following subsections:
B.9.1 Copyright Message Component Display Options

The Copyright Message component shares many of the same properties with the About Portal component. Table B–8 lists the properties that have defaults other than those specified in Table B–2, "About Portal Component Display Options".

**See Also:** The Copyright Message component has Style properties you can use to change the component’s look and feel. For more information, see Section 14.3.6, "Working with Style and Content Style Properties."

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inline Style</td>
<td>A field for entering CSS style values to define the appearance of the component. The default inline style is <code>white-space:nowrap;</code>.</td>
</tr>
<tr>
<td>Type</td>
<td>The component type. The default is <code>copyrightMessage</code>.</td>
</tr>
</tbody>
</table>

**See Also:** Display Options properties in the Component Properties dialog provide 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 the "Expression Language Expressions" appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

B.9.2 Copyright Message Component Tag and XML

The following tag is used to render the Copyright Message component on a `.jspx` page:

```xml
```

**Example B–5** provides the XML code that represents the component in the resource catalog file (`SiteTemplateCatalog.xml`) in a Portal Framework application.

**Example B–5  XML Code for the Copyright Message Component**

```xml
<tag>
    <name>outputText</name>
    <tag-class>oracle.webcenter.webcenterapp.spacescomponents.internal.view.taglib.OutputTextTag</tag-class>
    <body-content>empty</body-content>
    <attribute>
        <name>id</name>
    </attribute>
    <attribute>
        <name>rendered</name>
    </attribute>
    <attribute>
        <name>deferred-value</name>
        <type>boolean</type>
```
B.10 Create Page

The Create Page component is a link that opens the Create Page dialog (Figure B–8).

Figure B–8 Create Page Component

See Also: Chapter 12, "Creating and Editing a Portal Page," and the "Creating and Managing Personal Pages" chapter in Using 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.

This section lists and describes the Display Options associated with the Create Page component. Additionally, it provides the tag that invokes this component on a .jspx page and the XML code that defines this component in a resource catalog.

This section includes the following subsections:

- Section B.10.1, "Create Page Component Display Options"
B.10.1 Create Page Component Display Options

The Create Page component shares many of the same properties with the About Portal component. Table B–9 lists the properties that have defaults other than those specified in Table B–2, "About Portal Component Display Options".

See Also: The Create Page component has Style properties you can use to change the component's look and feel. For more information, see Section 14.3.6, "Working with Style and Content Style Properties."

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Short Desc</td>
<td>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}.</td>
</tr>
<tr>
<td>Task Flow Id</td>
<td>The component's unique identifier, for example wcdc4082953494.</td>
</tr>
<tr>
<td>Text</td>
<td>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}.</td>
</tr>
</tbody>
</table>

See Also: Display Options properties in the Component Properties dialog provide 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 the "Expression Language Expressions" appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

B.10.2 Create Page Component Tag and XML

The following tag is used to render the Create Page component on a .jspx page:

```xml
<wcdc:createPage id="" __taskFlowId=""
    xmlns:wcdc="http://xmlns.oracle.com/webcenter/spaces/taglib"
    displayType="link"
    inlineStyle="white-space:nowrap;"
    text="#{uib_o_w_w_r_WebCenter.LABEL_CREATE_PAGE}"
    shortDesc="#{uib_o_w_w_r_WebCenter.TOOLTIP_MANAGE_PAGES_CREATE_PAGE}" />
```

Example B–6 provides the XML code that represents the component in the resource catalog file (SiteTemplateCatalog.xml) in a Portal Framework application.

**Example B–6  XML Code for the Create Page Component**

```xml
<tag>
  <name>createPage</name>
  <tag-class>oracle.webcenter.webcenterapp.internal.view.taglib.CreatePageTag</tag-class>
  <body-content>empty</body-content>
  <attribute>
    <name>id</name>
  </attribute>
  <attribute>
    <name>rendered</name>
  </attribute>
</tag>
```
B.11 Create Portal

The Create Portal component is a link that opens the portal creation wizard (Figure B–9).

Figure B–9  Create Portal Component

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 Part I, "Getting Started.".

This section lists and describes the Display Options associated with the Create Portal component. Additionally, it provides the tag that invokes this component on a .jspx page and the XML code that defines this component in a resource catalog.

This section includes the following subsections:

- Section B.11.1, "Create Portal Component Display Options"
- Section B.11.2, "Create Portal Component Tag and XML"

B.11.1 Create Portal Component Display Options

The Create Portal component shares many of the same properties with the About Portal component. Table B–10 lists the properties that have defaults other than those specified in Table B–2, "About Portal Component Display Options".

See Also: The Create Portal component has Style properties you can use to change the component's look and feel. For more information, see Section 14.3.6, "Working with Style and Content Style Properties."
The following tag is used to render the Create Portal component on a .jspx page:

```xml
<wcdc:createSpace id="" __taskFlowId=""
    xmlns:wcdc="http://xmlns.oracle.com/webcenter/spaces/taglib"
    displayType="link" inlineStyle="white-space:nowrap;"
    text="#{uib_o_w_s_r_Spaces.HEADING_CREATE_COMMUNITY}" 
    shortDesc="#{uib_o_w_s_r_Spaces.HEADING_CREATE_COMMUNITY}"/>
```

Example B–7 provides the XML code that represents the component in the resource catalog file (SiteTemplateCatalog.xml) in a Portal Framework application.

**Example B–7  XML Code for the Create Portal Component**

```xml
<tag>
    <name>createSpace</name>
    <tag-class>oracle.webcenter.webcenterapp.internal.view.taglib.
    CreateSpaceTag</tag-class>
    <body-content>empty</body-content>
    <attribute>
        <name>id</name>
    </attribute>
    <attribute>
        <name>rendered</name>
        <deferred-value>
            <type>boolean</type>
        </deferred-value>
    </attribute>
    <attribute>
        <name>binding</name>
        <deferred-value/>
    </attribute>
    <attribute>
        <name>clientComponent</name>
        <deferred-value>
            <type>boolean</type>
        </deferred-value>
    </attribute>
</tag>
```

### See Also:
Display Options properties in the Component Properties dialog provide 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 the "Expression Language Expressions" appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

#### B.11.2 Create Portal Component Tag and XML

The following tag is used to render the Create Portal component on a .jspx page:

```xml
<wcdc:createSpace id="" __taskFlowId=""
    xmlns:wcdc="http://xmlns.oracle.com/webcenter/spaces/taglib"
    displayType="link" inlineStyle="white-space:nowrap;"
    text="#{uib_o_w_s_r_Spaces.HEADING_CREATE_COMMUNITY}" 
    shortDesc="#{uib_o_w_s_r_Spaces.HEADING_CREATE_COMMUNITY}"/>
```

**Table B–10  Create Portal Component Display Options**

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Short Desc</td>
<td>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}.</td>
</tr>
<tr>
<td>Text</td>
<td>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}.</td>
</tr>
</tbody>
</table>

If you need EL assistance, an application developer can provide an EL expression; see the "Expression Language Expressions" appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.
<attribute>
  <name>customizationId</name>
  <deferred-value/>
</attribute>
<attribute>
  <name>depressedIcon</name>
  <required>false</required>
  <deferred-value/>
</attribute>
<attribute>
  <name>disabled</name>
  <required>false</required>
  <deferred-value/>
</attribute>
<attribute>
  <name>disabledIcon</name>
  <required>false</required>
  <deferred-value/>
</attribute>
<attribute>
  <name>displayType</name>
  <required>false</required>
  <deferred-value/>
</attribute>
<attribute>
  <name>hoverIcon</name>
  <required>false</required>
  <deferred-value/>
</attribute>
<attribute>
  <name>icon</name>
  <required>false</required>
  <deferred-value/>
</attribute>
<attribute>
  <name>iconPosition</name>
  <required>false</required>
  <deferred-value/>
</attribute>
<attribute>
  <name>inlineStyle</name>
  <required>false</required>
  <deferred-value/>
</attribute>
<attribute>
  <name>shortDesc</name>
  <required>false</required>
  <deferred-value/>
</attribute>
<attribute>
  <name>styleClass</name>
  <required>false</required>
  <deferred-value/>
</attribute>
<attribute>
  <name>__taskFlowId</name>
  <required>false</required>
  <deferred-value/>
</attribute>
B.12 Create Subportal

The Create Subportal component is a link that opens a dialog for creating a subportal (Figure B–10).

Figure B–10 Create Subportal Component

A subportal is a portal that is hierarchically lower than its parent portal. The Create Subportal component is useful for providing an on-the-spot means of creating subportals in the current portal. Only authorized users can see and use the **Create Subportal** link.

See Also: Section 5.3, "Creating a Subportal"

This section lists and describes the Display Options associated with the Create Subportal component. Additionally, it provides the tag that invokes this component on a .jspx page and the XML code that defines this component in a resource catalog.

This section includes the following subsections:

- Section B.12.1, "Create Subportal Component Display Options"
- Section B.12.2, "Create Subportal Component Tag and XML"

### B.12.1 Create Subportal Component Display Options

The Create Subportal component shares many of the same properties with the About Portal component. Table B–11 lists the properties that have defaults other than those specified in Table B–2, "About Portal Component Display Options".

See Also: The Create Subportal component has Style properties you can use to change the component's look and feel. For more information, see Section 14.3.6, "Working with Style and Content Style Properties."

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Short Desc</td>
<td>A field for entering tooltip text to display when users hover their mouse pointers over the component. The default is <em>Create a Subportal</em>. The default is the rendered value of the EL expression #{uib_o_w_s_r_Spaces.HEADING_CREATE_SUB_COMMUNITY}.</td>
</tr>
<tr>
<td>Text</td>
<td>Display text for the component. The default is <em>Create a Subportal</em>. The default is the rendered value of the EL expression #{uib_o_w_s_r_Spaces.HEADING_CREATE_SUB_COMMUNITY}.</td>
</tr>
</tbody>
</table>
Create Subportal

See Also: Display Options properties in the Component Properties dialog provide 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 the “Expression Language Expressions” appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

B.12.2 Create Subportal Component Tag and XML

The following tag is used to render the Create Subportal component on a .jspx page:

```xml
<wcdc:createSubSpace id="#" __taskFlowId="#"
    xmlns:wcdc="http://xmlns.oracle.com/webcenter/spaces/taglib"
    displayType='link' inlineStyle='white-space:nowrap;'
    text="#{uib_o_w_s_r_Spaces.HEADING_CREATE_SUB_COMMUNITY}"
    shortDesc="#{uib_o_w_s_r_Spaces.HEADING_CREATE_SUB_COMMUNITY}"/>
```

Example B–8 provides the XML code that represents the component in the resource catalog file (SiteTemplateCatalog.xml) in a Portal Framework application.

Example B–8 XML Code for the Create Subportal Component

```xml
tag
    <name>createSubSpace</name>
    <tag-class>oracle.webcenter.webcenterapp.internal.view.taglib.CreateSubspaceTag</tag-class>
    <body-content>empty</body-content>
    <attribute>
        <name>id</name>
    </attribute>
    <attribute>
        <name>rendered</name>
        <deferred-value>
            <type>boolean</type>
        </deferred-value>
    </attribute>
    <attribute>
        <name>binding</name>
        <deferred-value/>
    </attribute>
    <attribute>
        <name>clientComponent</name>
        <deferred-value>
            <type>boolean</type>
        </deferred-value>
    </attribute>
    <attribute>
        <name>customizationId</name>
        <deferred-value/>
    </attribute>
    <attribute>
        <name>depressedIcon</name>
        <required>false</required>
        <deferred-value/>
    </attribute>
    <attribute>
        <name>disabled</name>
        <required>false</required>
        <deferred-value/>
    </attribute>
</tag>
```
</tag>
B.13 Current User Profile

The Current User Profile component is the name of the current user linked to the user’s Profile page (Figure B–11).

Figure B–11 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 the “About Business Role Pages” section in Administering Oracle WebCenter Portal. For more information about profiles, see the “Managing Your Profile” section in Using Oracle WebCenter Portal.

This section lists and describes the Display Options associated with the Current User Profile component. Additionally, it provides the tag that invokes this component on a .jspx page and the XML code that defines this component in a resource catalog.

This section includes the following subsections:

■ Section B.13.1, ”Current User Profile Component Display Options”
■ Section B.13.2, ”Current User Profile Component Tag and XML”

B.13.1 Current User Profile Component Display Options

The Current User Profile component shares many of the same properties with the About Portal component. Table B–12 lists the properties that have defaults other than those specified in Table B–2, ”About Portal Component Display Options”.

See Also: The Current User Profile component has Style properties you can use to change the component’s look and feel. For more information, see Section 14.3.6, ”Working with Style and Content Style Properties.”

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Short Desc</td>
<td>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.usersDisplayName}.</td>
</tr>
<tr>
<td>Text</td>
<td>Display text for the component. The default is the current user’s name. The default is the rendered value of the EL expression #{security.usersDisplayName}.</td>
</tr>
</tbody>
</table>
See Also: Display Options properties in the Component Properties dialog provide 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 the "Expression Language Expressions" appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

B.13.2 Current User Profile Component Tag and XML

The following tag is used to render the Current User Profile component on a .jspx page:

```xml
<wcdc:userProfile id="#"
    xmlns:wcdc="http://xmlns.oracle.com/webcenter/spaces/taglib"
    displayType="link" inLineStyle="white-space:nowrap"
    text="#{security.userDisplayName}" shortDesc="#{security.userDisplayName}" />
```

Example B–9 provides the XML code that represents the component in the resource catalog file (SiteTemplateCatalog.xml) in a Portal Framework application.

**Example B–9 XML Code for the Current User Profile Component**

```xml
<tag>
    <name>userProfile</name>
    <tag-class>oracle.webcenter.webcenterapp.internal.view.taglib.UserProfileTag</tag-class>
    <body-content>empty</body-content>
    <attribute>
        <name>id</name>
    </attribute>
    <attribute>
        <name>rendered</name>
        <deferred-value/>
    </attribute>
    <attribute>
        <name>binding</name>
        <deferred-value/>
    </attribute>
    <attribute>
        <name>clientComponent</name>
        <deferred-value/>
    </attribute>
    <attribute>
        <name>customizationId</name>
        <deferred-value/>
    </attribute>
    <attribute>
        <name>depressedIcon</name>
        <required>false</required>
        <deferred-value/>
    </attribute>
    <attribute>
        <name>disabled</name>
        <required>false</required>
        <deferred-value/>
```
The Edit Page component is a link that opens the current page in the page editor (Figure B–12).

**Figure B–12  Edit Page Component**
Only users who are authorized to edit the current page can see and use the Edit Page link.

See Also: Section 12.4, "Editing a Page," and the "Editing a Personal Page" section in Using Oracle WebCenter Portal

This section lists and describes the Display Options associated with the Edit Page component. Additionally, it provides the tag that invokes this component on a .jspx page and the XML code that defines this component in a resource catalog.

This section includes the following subsections:

- Section B.14.1, "Edit Page Component Display Options"
- Section B.14.2, "Edit Page Component Tag and XML"

### B.14.1 Edit Page Component Display Options

The Edit Page component shares many of the same properties with the About Portal component. Table B–13 lists the properties that have defaults other than those specified in Table B–2, "About Portal Component Display Options".

See Also: The Edit Page component has Style properties you can use to change the component's look and feel. For more information, see Section 14.3.6, "Working with Style and Content Style Properties."

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Short Desc</td>
<td>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}.</td>
</tr>
<tr>
<td>Task Flow Id</td>
<td>The component's unique identifier, for example wcdc4082953494</td>
</tr>
<tr>
<td>Text</td>
<td>Display text for the component</td>
</tr>
<tr>
<td></td>
<td>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}.</td>
</tr>
</tbody>
</table>

See Also: Display Options properties in the Component Properties dialog provide 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 the "Expression Language Expressions" appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

### B.14.2 Edit Page Component Tag and XML

The following tag is used to render the Edit Page component on a .jspx page:

```xml
<wcdc:editPage id="#" xmlns:wcde="http://xmlns.oracle.com/webcenter/spaces/taglib" displayType="link" inLineStyle="white-space:nowrap;" text="#{uib_o_w_w_r_WebCenter.PAGE_CONTEXT_EDIT_PAGE}"
    shortDesc="#{uib_o_w_w_r_WebCenter.PAGE_CONTEXT_EDIT_PAGE_DESC}" />
```

Example B–10 provides the XML code that represents the component in the resource catalog file (SiteTemplateCatalog.xml) in a Portal Framework application.
Example B–10  XML Code for the Edit Page Component

<tag>
  <name>editPage</name>
  <tag-class>oracle.webcenter.webcenterapp.internal.view.taglib.EditPageTag</tag-class>
  <body-content>empty</body-content>
  <attribute>
    <name>id</name>
  </attribute>
  <attribute>
    <name>rendered</name>
    <deferred-value>
      <type>boolean</type>
    </deferred-value>
  </attribute>
  <attribute>
    <name>binding</name>
    <deferred-value/>
  </attribute>
  <attribute>
    <name>clientComponent</name>
    <deferred-value>
      <type>boolean</type>
    </deferred-value>
  </attribute>
  <attribute>
    <name>customizationId</name>
    <deferred-value/>
  </attribute>
  <attribute>
    <name>depressedIcon</name>
    <required>false</required>
    <deferred-value/>
  </attribute>
  <attribute>
    <name>disabled</name>
    <required>false</required>
    <deferred-value/>
  </attribute>
  <attribute>
    <name>disabledIcon</name>
    <required>false</required>
    <deferred-value/>
  </attribute>
  <attribute>
    <name>displayType</name>
    <required>false</required>
    <deferred-value/>
  </attribute>
  <attribute>
    <name>hoverIcon</name>
    <required>false</required>
    <deferred-value/>
  </attribute>
  <attribute>
    <name>icon</name>
    <required>false</required>
    <deferred-value/>
  </attribute>
</tag>
B.15 Favorites Menu

The Favorites Menu component is a menu with options to open the Add to Favorites and Manage Favorites dialogs (Figure B–13).

Figure B–13 Favorites Menu Component

See Also: The "Managing Your Favorites" chapter in Using Oracle WebCenter Portal

This section lists and describes the Display Options associated with the Favorites Menu component. Additionally, it provides the tag that invokes this component on a .jspx page and the XML code that defines this component in a resource catalog.

This section includes the following subsections:
- Section B.15.1, "Favorites Menu Component Display Options"
- Section B.15.2, "Favorites Menu Component Tag and XML"
B.15.1 Favorites Menu Component Display Options

The Favorites Menu component shares many of the same properties with the About Portal component. Table B–14 lists the properties that have defaults other than those specified in Table B–2, "About Portal Component Display Options".

See Also: The Favorites Menu component has Style properties you can use to change the component's look and feel. For more information, see Section 14.3.6, "Working with Style and Content Style Properties."

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Short Desc</td>
<td>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}.</td>
</tr>
<tr>
<td>Task Flow Id</td>
<td>The component's unique identifier, for example wcdc4082953494.</td>
</tr>
<tr>
<td>Text</td>
<td>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}.</td>
</tr>
</tbody>
</table>

See Also: Display Options properties in the Component Properties dialog provide 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 the "Expression Language Expressions" appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

B.15.2 Favorites Menu Component Tag and XML

The following tag is used to render the Favorites Menu component on a .jspx page:

```xml
<wcdc:favoritesMenu id="" __taskFlowId="" xmlns:wcdc="http://xmlns.oracle.com/webcenter/spaces/taglib" displayType='link' inlineStyle='white-space:nowrap;' styleClass='WCLinkMenu' text='#{uib_o_w_w_r_WebCenter.LABEL_FAVORITES_DESC}' shortDesc='#{uib_o_w_w_r_WebCenter.LABEL_FAVORITES_DESC}' />
```

Example B–11 provides the XML code that represents the component in the resource catalog file (SiteTemplateCatalog.xml) in a Portal Framework application.

**Example B–11 XML Code for the Favorites Menu Component**

```xml
<tag>
  <name>favoritesMenu</name>
  <tag-class>oracle.webcenter.webcenterapp.internal.view.taglib.FavoritesMenuTag</tag-class>
  <body-content>empty</body-content>
  <attribute>
    <name>id</name>
  </attribute>
  <attribute>
    <name>rendered</name>
  </attribute>
  <attribute>
    <name>deferred-value>
```

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<type>boolean</type>
</attribute>
</attribute>
<attribute>
  <name>binding</name>
  <deferred-value/>
</attribute>
<attribute>
  <name>clientComponent</name>
  <deferred-value>
    <type>boolean</type>
  </deferred-value>
</attribute>
<attribute>
  <name>customizationId</name>
  <deferred-value/>
</attribute>
<attribute>
  <name>depressedIcon</name>
  <required>false</required>
  <deferred-value/>
</attribute>
<attribute>
  <name>disabled</name>
  <required>false</required>
  <deferred-value/>
</attribute>
<attribute>
  <name>disabledIcon</name>
  <required>false</required>
  <deferred-value/>
</attribute>
<attribute>
  <name>displayType</name>
  <required>false</required>
  <deferred-value/>
</attribute>
<attribute>
  <name>hoverIcon</name>
  <required>false</required>
  <deferred-value/>
</attribute>
<attribute>
  <name>icon</name>
  <required>false</required>
  <deferred-value/>
</attribute>
<attribute>
  <name>iconPosition</name>
  <required>false</required>
  <deferred-value/>
</attribute>
<attribute>
  <name>inlineStyle</name>
  <required>false</required>
  <deferred-value/>
</attribute>
<attribute>
  <name>shortDesc</name>
  <required>false</required>
  <deferred-value/>
</attribute>
The Global Help component is a link that opens WebCenter Portal online help (Figure B–14).

**Figure B–14  Global Help Component**

This section lists and describes the Display Options associated with the Global Help component. Additionally, it provides the tag that invokes this component on a .jspx page and the XML code that defines this component in a resource catalog.

This section includes the following subsections:

- **Section B.16.1, "Global Help Component Display Options"**
- **Section B.16.2, "Global Help Component Tag and XML"**

### B.16.1 Global Help Component Display Options

The Global Help component shares many of the same properties with the About Portal component. Table B–15 lists the properties that have defaults other than those specified in Table B–2, "About Portal Component Display Options”.

**See Also:** The Global Help component has Style properties you can use to change the component’s look and feel. For more information, see Section 14.3.6, "Working with Style and Content Style Properties.”
The following tag is used to render the Global Help component on a .jspx page:

```xml
<wcdc:spacesAction id="" xmlns:wcdc="http://xmlns.oracle.com/webcenter/spaces/taglib" type="globalHelp" displayType="link" text="#{uib_o_w_w_r_WebCenter.LABEL_HELP}" shortDesc="#{uib_o_w_w_r_WebCenter.LABEL_HELP_DESC}" inlineStyle="white-space:nowrap"/>
```

In the resource catalog, the Global Help component uses the same XML code as the About WebCenter component. For more information, see Section B.4.2, "About WebCenter Component Tag and XML."

### B.17 Home Portal

The Home Portal component is a link to navigate to the Home portal (Figure B–15).

**Figure B–15 Home Portal Component**

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Short Desc</td>
<td>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}.</td>
</tr>
<tr>
<td>Text</td>
<td>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}.</td>
</tr>
<tr>
<td>Type</td>
<td>The component type. The default is globalHelp.</td>
</tr>
</tbody>
</table>

**See Also:** Display Options properties in the Component Properties dialog provide 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 the "Expression Language Expressions" appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

This section lists and describes the Display Options associated with the Home Portal component. Additionally, it provides the tag that invokes this component on a .jspx page and the XML code that defines this component in a resource catalog. This section includes the following subsections:

- **Section B.17.1, "Home Portal Component Display Options"**
B.17.1 Home Portal Component Display Options

The Home Portal component shares many of the same properties with the About Portal component. Table B–16 lists the properties that have defaults other than those specified in Table B–2, "About Portal Component Display Options".

**See Also:** The Home Portal component has Style properties you can use to change the component's look and feel. For more information, see Section 14.3.6, "Working with Style and Content Style Properties."

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
</table>
| Text     | Display text for the component  
          The default is Personal Portal. |
| Type     | The component type  
          The default is personalSpace. |

**See Also:** Display Options properties in the Component Properties dialog provide access to an Expression Language (EL) editor for entering and testing EL values.

If you need EL assistance, an application developer can provide an EL expression; see the "Expression Language Expressions" appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

B.17.2 Home Portal Component Tag and XML

The following tag is used to render the Home Portal component on a .jspx page:

```xml
<wcdc:spacesAction id="" xmlns:wcdc="http://xmlns.oracle.com/webcenter/spaces/taglib" type="personalSpace" displayType="link" text="Personal Portal" inlineStyle="white-space:nowrap;"/>
```

In the resource catalog, the Home Portal component uses the same XML code as the About WebCenter component. For more information, see Section B.4.2, "About WebCenter Component Tag and XML."

B.18 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–16).

**See Also:** For information about Connections, see the "Managing Your Contacts" chapter in Using Oracle WebCenter Portal.
This section lists and describes the Display Options associated with the Invite People as Connection component. Additionally, it provides the tag that invokes this component on a .jspx page and the XML code that defines this component in a resource catalog.

This section includes the following subsections:

- Section B.18.1, "Invite People as Connection Component Display Options"
- Section B.18.2, "Invite People as Connection Component Tag and XML"

B.18.1 Invite People as Connection Component Display Options

The Invite People as Connection component shares many of the same properties with the About Portal component. Table B–17 lists the properties that have defaults other than those specified in Table B–2, "About Portal Component Display Options".

See Also: The Invite People as Connection component has Style properties you can use to change the component's look and feel. For more information, see Section 14.3.6, "Working with Style and Content Style Properties."

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Short Desc</td>
<td>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}.</td>
</tr>
<tr>
<td>Text</td>
<td>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}.</td>
</tr>
</tbody>
</table>

See Also: Display Options properties in the Component Properties dialog provide 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 the "Expression Language Expressions" appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

B.18.2 Invite People as Connection Component Tag and XML

The following tag is used to render the Invite People as Connection component on a .jspx page:

```xml
<wcdc:invitePeopleAsConnection id="#" __taskFlowId="#"
    xmlns:wcdc="http://xmlns.oracle.com/webcenter/spaces/taglib"
    displayType="link" inlineStyle="white-space:nowrap;"
    text="#{uib_o_w_s_r_Spaces.LABEL_INVITE_PEOPLE}"
    shortDesc="#{uib_o_w_s_r_Spaces.LABEL_INVITE_PEOPLE}"/>
```

Example B–12 provides the XML code that represents the component in the resource catalog file (SiteTemplateCatalog.xml) in a Portal Framework application.

Example B–12  XML Code for the Invite People as Connection Component

```xml
<tag>
```
B.19 Join Portal

The Join Portal component is a link that initiates the process of becoming a member of a portal, usually the current portal (Figure B–17).

Figure B–17 Join Portal Component

See Also: The "Joining a Portal" section in Using Oracle WebCenter Portal

This section lists and describes the Display Options associated with the Join Portal component. Additionally, it provides the tag that invokes this component on a .jspx page and the XML code that defines this component in a resource catalog.

This section includes the following subsections:

- Section B.19.1, "Join Portal Component Display Options"
- Section B.19.2, "Join Portal Component Tag and XML"

B.19.1 Join Portal Component Display Options

The Join Portal component shares many of the same properties with the About Portal component. Table B–18 lists the properties that have defaults other than those specified in Table B–2, "About Portal Component Display Options".
See Also: The Join Portal component has Style properties you can use to change the component’s look and feel. For more information, see Section 14.3.6, "Working with Style and Content Style Properties."

### Table B–18 Join Portal Component Display Options

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Short Desc</td>
<td>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}.</td>
</tr>
<tr>
<td>Text</td>
<td>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}.</td>
</tr>
</tbody>
</table>

See Also: Display Options properties in the Component Properties dialog provide 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 the "Expression Language Expressions” appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

### B.19.2 Join Portal Component Tag and XML

The following tag is used to render the Join Portal component on a .jspx page:

```xml
<wcdc:joinSpace id="" xmlns:wcdc="http://xmlns.oracle.com/webcenter/spaces/taglib" displayType="link"-inlineStyle="white-space:nowrap; text="#{uib_o_w_s_r_Spaces.GROUP_SPACES_MANAGE_JOIN_SPACE}" shortDesc="#{uib_o_w_s_r_Spaces.GROUP_SPACES_MANAGE_JOIN_SPACE}" />
```

Example B–13 provides the XML code that represents the component in the resource catalog file (SiteTemplateCatalog.xml) in a Portal Framework application.

**Example B–13 XML Code for the Join Portal Component**

```xml
<tag>
    <name>joinSpace</name>
    <tag-class>oracle.webcenter.webcenterapp.internal.view.taglib.JoinSpaceTag</tag-class>
    <body-content>empty</body-content>
    <attribute>
        <name>id</name>
    </attribute>
    <attribute>
        <name>rendered</name>
        <deferred-value>
            <type>boolean</type>
        </deferred-value>
    </attribute>
    <attribute>
        <name>binding</name>
        <deferred-value/>
    </attribute>
    <attribute>
        <name>clientComponent</name>
    </attribute>
</tag>
```
<attribute>
  <name>customizationId</name>
  <deferred-value/>
</attribute>
<attribute>
  <name>depressedIcon</name>
  <required>false</required>
  <deferred-value/>
</attribute>
<attribute>
  <name>disabled</name>
  <required>false</required>
  <deferred-value/>
</attribute>
<attribute>
  <name>disabledIcon</name>
  <required>false</required>
  <deferred-value/>
</attribute>
<attribute>
  <name>displayType</name>
  <required>false</required>
  <deferred-value/>
</attribute>
<attribute>
  <name>hoverIcon</name>
  <required>false</required>
  <deferred-value/>
</attribute>
<attribute>
  <name>icon</name>
  <required>false</required>
  <deferred-value/>
</attribute>
<attribute>
  <name>iconPosition</name>
  <required>false</required>
  <deferred-value/>
</attribute>
<attribute>
  <name>inlineStyle</name>
  <required>false</required>
  <deferred-value/>
</attribute>
<attribute>
  <name>shortDesc</name>
  <required>false</required>
  <deferred-value/>
</attribute>
<attribute>
  <name>scopeName</name>
  <required>false</required>
  <deferred-value/>
</attribute>
<attribute>
  <name>styleClass</name>
  <deferred-value/>
</attribute>
B.20 Leave Portal

The Leave Portal component is a link for requesting a removal of a user's own membership in the current portal (Figure B–18).

Figure B–18  Leave Portal Component

See Also: The "Cancelling Your Portal Membership" section in Using Oracle WebCenter Portal

This section lists and describes the Display Options associated with the Leave Portal component. Additionally, it provides the tag that invokes this component on a .jspx page and the XML code that defines this component in a resource catalog.

This section includes the following subsections:

■ Section B.20.1, "Leave Portal Component Display Options"
■ Section B.20.2, "Leave Portal Component Tag and XML"

B.20.1 Leave Portal Component Display Options

The Leave Portal component shares many of the same properties with the About Portal component. Table B–19 lists the properties that have defaults other than those specified in Table B–2, "About Portal Component Display Options".

See Also: The Leave Portal component has Style properties you can use to change the component's look and feel. For more information, see Section 14.3.6, "Working with Style and Content Style Properties."

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Short Desc</td>
<td>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}.</td>
</tr>
<tr>
<td>Text</td>
<td>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}.</td>
</tr>
</tbody>
</table>
See Also: Display Options properties in the Component Properties dialog provide 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 the "Expression Language Expressions" appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

B.20.2 Leave Portal Component Tag and XML

The following tag is used to render the Leave Portal component on a .jspx page:

```xml
<wcdc:leaveSpace id="#"
 xmlns:wcdc="http://xmlns.oracle.com/webcenter/spaces/taglib"
 text="#{uib_o_w_s_r_Spaces.LABEL_LEAVE_SPACE}"
 shortDesc="#{uib_o_w_s_r_Spaces.LABEL_LEAVE_SPACE}"
 inlineStyle="white-space:nowrap;"/>
```

Example B–14 provides the XML code that represents the component in the resource catalog file (SiteTemplateCatalog.xml) in a Portal Framework application.

**Example B–14  XML Code for the Leave Portal Component**

```xml
<tag>
  <name>leaveSpace</name>
  <tag-class>oracle.webcenter.webcenterapp.internal.view.taglib.LeaveSpaceTag</tag-class>
  <body-content>empty</body-content>
  <attribute>
    <name>id</name>
  </attribute>
  <attribute>
    <name>rendered</name>
    <deferred-value>
      <type>boolean</type>
    </deferred-value>
  </attribute>
  <attribute>
    <name>binding</name>
    <deferred-value/>
  </attribute>
  <attribute>
    <name>clientComponent</name>
    <deferred-value>
      <type>boolean</type>
    </deferred-value>
  </attribute>
  <attribute>
    <name>customizationId</name>
    <deferred-value/>
  </attribute>
  <attribute>
    <name>depressedIcon</name>
    <required>false</required>
    <deferred-value/>
  </attribute>
  <attribute>
    <name>disabled</name>
    <required>false</required>
    <deferred-value/>
  </attribute>
</tag>
```
B.21 Login

The Login component is a link for navigating to the WebCenter Portal Login screen (Figure B–19).
The Login link appears only to users who are not logged in. That is, if a user is logged in this link is hidden.

This section lists and describes the Display Options associated with the Login component. Additionally, it provides the tag that invokes this component on a .jspx page and the XML code that defines this component in a resource catalog.

This section includes the following subsections:

- Section B.21.1, "Login Component Display Options"
- Section B.21.2, "Login Component Tag and XML"

### B.21.1 Login Component Display Options

The Login component shares many of the same properties with the About Portal component. Table B–20 lists the properties that have defaults other than those specified in Table B–2, "About Portal Component Display Options".

**See Also:** The Login component has Style properties you can use to change the component's look and feel. For more information, see Section 14.3.6, "Working with Style and Content Style Properties."

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Short Desc</td>
<td>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}.</td>
</tr>
<tr>
<td>Text</td>
<td>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}.</td>
</tr>
<tr>
<td>Type</td>
<td>The component type. The default is login.</td>
</tr>
</tbody>
</table>

**See Also:** Display Options properties in the Component Properties dialog provide 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 the "Expression Language Expressions" appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

### B.21.2 Login Component Tag and XML

The following tag is used to render the Login component on a .jspx page:

```xml
<wcdc:spacesAction id="#"
    xmlns:wcdc="http://xmlns.oracle.com/webcenter/spaces/taglib"
    type='login' displayType='link' inlineStyle='white-space:nowrap'
    text='#{uib_o_w_w_r_webcenter.GLOBAL_LINK_LOGIN}'
```
In the resource catalog, the Login component uses the same XML code as the About WebCenter component. For more information, see Section B.4.2, "About WebCenter Component Tag and XML."

B.22 Logout

The Logout component is a link for logging out of WebCenter Portal (Figure B–20).

![Logout Component](image)

The Logout link appears only to logged in users. That is, if a user is logged out, this link is hidden.

This section lists and describes the Display Options associated with the Logout component. Additionally, it provides the tag that invokes this component on a .jspx page and the XML code that defines this component in a resource catalog.

This section includes the following subsections:

- Section B.22.1, "Logout Component Display Options"
- Section B.22.2, "Logout Component Tag and XML"

B.22.1 Logout Component Display Options

The Logout component shares many of the same properties with the About Portal component. Table B–21 lists the properties that have defaults other than those specified in Table B–2, "About Portal Component Display Options".

**See Also:** The Logout component has Style properties you can use to change the component's look and feel. For more information, see Section 14.3.6, "Working with Style and Content Style Properties."

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Short Desc</strong></td>
<td>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}.</td>
</tr>
<tr>
<td><strong>Text</strong></td>
<td>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}.</td>
</tr>
<tr>
<td><strong>Type</strong></td>
<td>The component type. The default is logout.</td>
</tr>
</tbody>
</table>
B.22.2 Logout Component Tag and XML

The following tag is used to render the Logout component on a .jspx page:

```xml
<wcdc:spacesAction id="" xmlns:wcdc="http://xmlns.oracle.com/webcenter/spaces/taglib" type='logout' displayType='link' inlineStyle='white-space:nowrap' text='#{uib_o_w_w_r_WebCenter.GLOBAL_LINK_LOGOUT}' shortDesc='#{uib_o_w_w_r_WebCenter.GLOBAL_LINK_LOGOUT_DESC}' />
```

In the resource catalog, the Logout component uses the same XML code as the About WebCenter component. For more information, see Section B.4.2, "About WebCenter Component Tag and XML."

B.23 Mail Members

The Mail Members component is a link that opens a simple send-mail window (Figure B–21).

![Mail Members Component](image)

Such messages are sent to the in-boxes of all members of the current portal.

This section lists and describes the Display Options associated with the Mail Members component. Additionally, it provides the tag that invokes this component on a .jspx page and the XML code that defines this component in a resource catalog.

This section includes the following subsections:

- Section B.23.1, "Mail Members Component Display Options"
- Section B.23.2, "Mail Members Component Tag and XML"

B.23.1 Mail Members Component Display Options

The Mail Members 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, "About Portal Component Display Options".

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Text</td>
<td>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}.</td>
</tr>
</tbody>
</table>
See Also: Display Options properties in the Component Properties dialog provide 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 the "Expression Language Expressions" appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

B.23.2 Mail Members Component Tag and XML

The following tag is used to render the Mail Members component on a .jspx page:

```xml
<wcdc:emailMembersLink id=""
  xmlns:wcdc="http://xmlns.oracle.com/webcenter/spaces/taglib"
  text="#{uib_o_w_w_r_WebCenter.LABEL_SEND_EMAIL_TO_MEMBERS}"
/>
```

Example B–15 provides the XML code that represents the component in the resource catalog file (SiteTemplateCatalog.xml) in a Portal Framework application.

**Example B–15** XML Code for the Mail Members Component

```xml
<tag>
  <name>emailMembersLink</name>
  <tag-class>oracle.webcenter.webcenterapp.internal.view.taglib.EmailMembersLinkTag</tag-class>
  <body-content>empty</body-content>
  <attribute>
    <name>id</name>
  </attribute>
  <attribute>
    <name>rendered</name>
    <deferred-value>
      <type>boolean</type>
    </deferred-value>
  </attribute>
  <attribute>
    <name>binding</name>
    <deferred-value/>
  </attribute>
  <attribute>
    <name>clientComponent</name>
    <deferred-value>
      <type>boolean</type>
    </deferred-value>
  </attribute>
  <attribute>
    <name>customizationId</name>
    <deferred-value/>
  </attribute>
  <attribute>
    <name>disabled</name>
    <required>false</required>
    <deferred-value/>
  </attribute>
  <attribute>
    <name>displayType</name>
    <required>false</required>
    <deferred-value/>
  </attribute>
</tag>
```
B.24 Mail Portal Moderators

The Mail Portal Moderators component is a link that opens a simple send-mail window (Figure B–22).

Figure B–22 Mail Portal Moderators Component

Send Mail to Moderators

Such messages are sent to the in-boxes of all users assigned the role Moderator for the current portal.

This section lists and describes the Display Options associated with the Mail Portal Moderators component. Additionally, it provides the tag that invokes this component on a .jspx page and the XML code that defines this component in a resource catalog.

This section includes the following subsections:

- Section B.24.1, "Mail Portal Moderators Component Display Options"
- Section B.24.2, "Mail Portal Moderators Component Tag and XML"

B.24.1 Mail Portal Moderators Component Display Options

The Mail Portal Moderators component shares many of the same properties with the About Portal component. Table B–23 lists the properties that have defaults other than those specified in Table B–2, "About Portal Component Display Options".

See Also: The Mail Portal Moderators component has Style properties you can use to change the component's look and feel. For more information, see Section 14.3.6, "Working with Style and Content Style Properties."

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Text</td>
<td>The default is Send Email to Moderators. The default is the rendered value of the EL expression #{uib_o_w_w_r_webCenter.LABEL_SEND_EMAIL_TO_MODERATORS}.</td>
</tr>
</tbody>
</table>
Mail Portal Moderators Component Tag and XML

The following tag is used to render the Mail Portal Moderators component on a .jspx page:

```xml
<wcdc:emailModeratorsLink id="" xmlns:wcdc="http://xmlns.oracle.com/webcenter/spaces/taglib" text="#{uib_o_w_w_r_WebCenter.LABEL_SEND_EMAIL_TO_MODERATORS}"/>
```

**Example B–16** provides the XML code that represents the component in the resource catalog file (SiteTemplateCatalog.xml) in a Portal Framework application.

**Example B–16  XML Code for the Mail Portal Moderators Component**

```
<tag>
  <name>emailModeratorsLink</name>
  <tag-class>oracle.webcenter.webcenterapp.internal.view.taglib.EmailModeratorsLinkTag</tag-class>
  <body-content>empty</body-content>
  <attribute>
    <name>id</name>
  </attribute>
  <attribute>
    <name>rendered</name>
    <deferred-value>
      <type>boolean</type>
    </deferred-value>
  </attribute>
  <attribute>
    <name>binding</name>
    <deferred-value/>
  </attribute>
  <attribute>
    <name>clientComponent</name>
    <deferred-value>
      <type>boolean</type>
    </deferred-value>
  </attribute>
  <attribute>
    <name>customizationId</name>
    <deferred-value/>
  </attribute>
  <attribute>
    <name>disabled</name>
    <required>false</required>
    <deferred-value/>
  </attribute>
  <attribute>
    <name>displayType</name>
    <required>false</required>
    <deferred-value/>
  </attribute>
</tag>
```

**See Also:** Display Options properties in the Component Properties dialog provide 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 the "Expression Language Expressions" appendix in *Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper*. 
The Manage Pages component is a link that opens the Manage Pages dialog (Figure B–23).

The Manage Pages dialog lists all of the pages to which the current user has access. Manage Pages provides controls for creating more pages, setting page creation defaults (Home portal only), and performing actions on pages, such as editing, renaming, setting access, and the like. Additionally, users can click a listed page name to navigate to that page.

See Also: For information about the types of actions users can perform through Manage Pages, see Chapter 12, "Creating and Editing a Portal Page" and the "Creating and Managing Personal Pages" chapter in Using Oracle WebCenter Portal.

This section lists and describes the Display Options associated with the Manage Pages component. Additionally, it provides the tag that invokes this component on a .jspx page and the XML code that defines this component in a resource catalog.

This section includes the following subsections:

- Section B.25.1, "Manage Pages Component Display Options"
- Section B.25.2, "Manage Pages Component Tag and XML"

B.25.1 Manage Pages Component Display Options

The Manage Pages component shares many of the same properties with the About Portal component. Table B–24 lists the properties that have defaults other than those specified in Table B–2, "About Portal Component Display Options".
See Also: The Manage Pages component has Style properties you can use to change the component's look and feel. For more information, see Section 14.3.6, "Working with Style and Content Style Properties."

Table B–24  Manage Pages Component Display Options

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Short Desc</td>
<td>A field for entering tooltip text to display when users hover their mouse pointers over the component. The default is &quot;Logout of WebCenter Portal.&quot; The default is the rendered value of the EL expression #{uib_o_w_w_r_WebCenter.TITLE_MANAGE_PAGES}.</td>
</tr>
<tr>
<td>Task Flow Id</td>
<td>The component's unique identifier, for example wcde4082953494</td>
</tr>
<tr>
<td>Text</td>
<td>Display text for the component. The default is &quot;Logout.&quot; The default is the rendered value of the EL expression #{uib_o_w_w_r_WebCenter.TITLE_MANAGE_PAGES}.</td>
</tr>
</tbody>
</table>

See Also: Display Options properties in the Component Properties dialog provide 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 the “Expression Language Expressions” appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

B.25.2 Manage Pages Component Tag and XML

The following tag is used to render the Manage Pages component on a .jspx page:

```xml
<wcdc:managePages id="#" __taskFlowId="#"
xmlns:wcdc="http://xmlns.oracle.com/webcenter/spaces/taglib"
displayType='link' inlineStyle='white-space:nowrap;'
text="#{uib_o_w_w_r_WebCenter.TITLE_MANAGE_PAGES}" shortDesc="#{uib_o_w_w_r_WebCenter.TITLE_MANAGE_PAGES}"/>
```

Example B–17 provides the XML code that represents the component in the resource catalog file (SiteTemplateCatalog.xml) in a Portal Framework application.

Example B–17  XML Code for the Manage Pages Component

```xml
<tag>
  <name>managePages</name>
  <tag-class>oracle.webcenter.webcenterapp.internal.view.taglib.ManagePagesTag</tag-class>
  <body-content>empty</body-content>
  <attribute>
    <name>id</name>
  </attribute>
  <attribute>
    <name>rendered</name>
    <deferred-value>
      <type>boolean</type>
    </deferred-value>
  </attribute>
  <attribute>
    <name>binding</name>
    <deferred-value/>
</tag>
```
<attribute>
  <name>clientComponent</name>
  <deferred-value>
    <type>boolean</type>
  </deferred-value>
</attribute>
<attribute>
  <name>customizationId</name>
  <deferred-value/>
</attribute>
<attribute>
  <name>depressedIcon</name>
  <required>false</required>
  <deferred-value/>
</attribute>
<attribute>
  <name>disabled</name>
  <required>false</required>
  <deferred-value/>
</attribute>
<attribute>
  <name>disabledIcon</name>
  <required>false</required>
  <deferred-value/>
</attribute>
<attribute>
  <name>displayType</name>
  <required>false</required>
  <deferred-value/>
</attribute>
<attribute>
  <name>hoverIcon</name>
  <required>false</required>
  <deferred-value/>
</attribute>
<attribute>
  <name>icon</name>
  <required>false</required>
  <deferred-value/>
</attribute>
<attribute>
  <name>iconPosition</name>
  <required>false</required>
  <deferred-value/>
</attribute>
<attribute>
  <name>inlineStyle</name>
  <required>false</required>
  <deferred-value/>
</attribute>
<attribute>
  <name>shortDesc</name>
  <required>false</required>
  <deferred-value/>
</attribute>
<attribute>
  <name>styleClass</name>
  <required>false</required>
  <deferred-value/>
</attribute>
B.26 Page Links

The Page Links component is an icon and link that opens the Links dialog (Figure B–24).

**Figure B–24  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:** The "Linking Information in WebCenter Portal" chapter in *Using Oracle WebCenter Portal*.

This section lists and describes the Display Options associated with the Page Links component. Additionally, it provides the tag that invokes this component on a .jspx page and the XML code that defines this component in a resource catalog.

This section includes the following subsections:

- Section B.26.1, "Page Links Component Display Options"
- Section B.26.2, "Page Links Component Tag and XML"

B.26.1 Page Links Component Display Options

*Table B–25* lists and describes the Display Options properties associated with the Page Links component.
The following tag is used to render the Page Links component on a .jspx page:

```
<wcdc:pageLinks id="#" __taskFlowId="#"
```

Example B–18 provides the XML code that represents the component in the resource catalog file (SiteTemplateCatalog.xml) in a Portal Framework application.

### Table B–25 Page Links Component Display Options

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Task Flow Id</td>
<td>A unique identifier for the component instance</td>
</tr>
<tr>
<td></td>
<td><strong>Caution:</strong> Never change this property’s default value</td>
</tr>
<tr>
<td>Show Label</td>
<td>Display text for the component</td>
</tr>
<tr>
<td></td>
<td>By default, the Page Links component is labeled Links.</td>
</tr>
<tr>
<td>Show Component</td>
<td>An option for hiding or showing the component on the page</td>
</tr>
<tr>
<td></td>
<td>■ Select to show the component</td>
</tr>
<tr>
<td></td>
<td>■ Deselect to hide the component</td>
</tr>
<tr>
<td></td>
<td>Once you hide a component in this way, any child components are also hidden.</td>
</tr>
<tr>
<td></td>
<td>You can show the component again through Composer Structure view (see</td>
</tr>
<tr>
<td></td>
<td>Section 12.4.1.3, &quot;About Structure View in Composer&quot;). Right-click the</td>
</tr>
<tr>
<td></td>
<td>hidden component, and select <strong>Show Component</strong> from the resulting context</td>
</tr>
<tr>
<td></td>
<td>menu.</td>
</tr>
</tbody>
</table>

**See Also:** Display Options properties in the Component Properties dialog provide 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 the "Expression Language Expressions" appendix in *Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper*.

### B.26.2 Page Links Component Tag and XML

The following tag is used to render the Page Links component on a .jspx page:

```
<wcdc:pageLinks id="#" __taskFlowId="#"
```

Example B–18 provides the XML code that represents the component in the resource catalog file (SiteTemplateCatalog.xml) in a Portal Framework application.

**Example B–18 XML Code for the Page Links Component**

```
<tag>
  <name>pageLinks</name>
  <tag-class>oracle.webcenter.webcenterapp.internal.view.taglib.PageLinksTag</tag-class>
  <body-content>empty</body-content>
  <attribute>
    <name>id</name>
  </attribute>
  <attribute>
    <name>rendered</name>
    <deferred-value>
      <type>boolean</type>
    </deferred-value>
  </attribute>
  <attribute>
    <name>binding</name>
    <deferred-value/>
  </attribute>
  <attribute>
    <name>clientComponent</name>
    <deferred-value>
      <type>boolean</type>
    </deferred-value>
  </attribute>
</tag>
```
B.27 Parent Portal

The Parent Portal component is a link that navigates to the top portal in a portal hierarchy (Figure B–25).

Figure B–25  Parent Portal Component

See Also: For information about portal hierarchies, see Chapter 5, "Working with Subportals."

This section lists and describes the Display Options associated with the Parent Portal component. Additionally, it provides the tag that invokes this component on a .jspx page and the XML code that defines this component in a resource catalog.

This section includes the following subsections:

■ Section B.27.1, "Parent Portal Component Display Options"
■ Section B.27.2, "Parent Portal Component Tag and XML"

B.27.1 Parent Portal Component Display Options

The Parent Portal component shares many of the same properties with the About Portal component. Table B–26 lists the properties that have defaults other than those specified in Table B–2, "About Portal Component Display Options".

See Also: The Parent Portal component has Style properties you can use to change the component's look and feel. For more information, see Section 14.3.6, "Working with Style and Content Style Properties."
The following tag is used to render the Parent Portal component on a `.jspx` page:

```xml
<wcdc:parentSpace id="" xmlns:wcdc="http://xmlns.oracle.com/webcenter/spaces/taglib" displayType="link" inlineStyle="white-space:nowrap;" text="#{uib_o_w_w_r_WebCenter.LABEL_NAVIGATE_TO_PARENT_SPACE}" shortDesc="#{uib_o_w_w_r_WebCenter.LABEL_NAVIGATE_TO_PARENT_SPACE}"/>
```

**Example B–19** provides the XML code that represents the component in the resource catalog file (`SiteTemplateCatalog.xml`) in a Portal Framework application.

**Table B–26  Parent Portal Component Display Options**

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Short Desc</td>
<td>A field for entering tooltip text to display when users hover their mouse pointers over the component. The default is <code>Navigate to Parent Portal</code>. The default is the rendered value of the EL expression <code>#{uib_o_w_w_r_WebCenter.LABEL_NAVIGATE_TO_PARENT_SPACE}</code>.</td>
</tr>
<tr>
<td>Text</td>
<td>Display text for the component. The default is <code>Navigate to Parent Portal</code>. The default is the rendered value of the EL expression <code>#{uib_o_w_w_r_WebCenter.LABEL_NAVIGATE_TO_PARENT_SPACE}</code>.</td>
</tr>
</tbody>
</table>

**See Also:** Display Options properties in the Component Properties dialog provide 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 the "Expression Language Expressions" appendix in *Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper*.

**B.27.2 Parent Portal Component Tag and XML**

The following tag is used to render the Parent Portal component on a `.jspx` page:

```xml
<wcdc:parentSpace id=""
 xmlns:wcdc="http://xmlns.oracle.com/webcenter/spaces/taglib"
 displayType="link" inlineStyle="white-space:nowrap;"
 text="#{uib_o_w_w_r_WebCenter.LABEL_NAVIGATE_TO_PARENT_SPACE}"
 shortDesc="#{uib_o_w_w_r_WebCenter.LABEL_NAVIGATE_TO_PARENT_SPACE}"/>
```

**Example B–19** provides the XML code that represents the component in the resource catalog file (`SiteTemplateCatalog.xml`) in a Portal Framework application.

**Example B–19  XML Code for the Parent Portal Component**

```xml
<tag>
 <name>parentSpace</name>
 <tag-class>oracle.webcenter.webcenterapp.internal.view.taglib.ParentSpaceTag</tag-class>
 <body-content>empty</body-content>
 <attribute>
  <name>id</name>
 </attribute>
 <attribute>
  <name>rendered</name>
  <deferred-value>
   <type>boolean</type>
  </deferred-value>
 </attribute>
 <attribute>
  <name>binding</name>
  <deferred-value/>
 </attribute>
 <attribute>
  <name>clientComponent</name>
  <deferred-value>
   <type>boolean</type>
  </deferred-value>
 </attribute>
</tag>
```
<attribute>
  <name>customizationId</name>
  <deferred-value/>
</attribute>
<attribute>
  <name>depressedIcon</name>
  <required>false</required>
  <deferred-value/>
</attribute>
<attribute>
  <name>disabledIcon</name>
  <required>false</required>
  <deferred-value/>
</attribute>
<attribute>
  <name>disabled</name>
  <required>false</required>
  <deferred-value/>
</attribute>
<attribute>
  <name>hoverIcon</name>
  <required>false</required>
  <deferred-value/>
</attribute>
<attribute>
  <name>icon</name>
  <required>false</required>
  <deferred-value/>
</attribute>
<attribute>
  <name>iconPosition</name>
  <required>false</required>
  <deferred-value/>
</attribute>
<attribute>
  <name>inlineStyle</name>
  <required>false</required>
  <deferred-value/>
</attribute>
<attribute>
  <name>shortDesc</name>
  <required>false</required>
  <deferred-value/>
</attribute>
<attribute>
  <name>scopeName</name>
  <required>false</required>
  <deferred-value/>
</attribute>
<attribute>
  <name>styleClass</name>
  <required>false</required>
  <deferred-value/>
</attribute>

B.28 Portal Switcher

The Portal Switcher component is a menu where users can select a portal to which to navigate (Figure B–26).

Figure B–26 Portal Switcher Component

![Portal Switcher Component](image)

This section lists and describes the Display Options associated with the Portal Switcher component. Additionally, it provides the tag that invokes this component on a .jspx page and the XML code that defines this component in a resource catalog.

This section includes the following subsections:

- Section B.28.1, "Portal Switcher Component Display Options"
- Section B.28.2, "Portal Switcher Component Tag and XML"

B.28.1 Portal Switcher Component Display Options

The Portal Switcher component shares many of the same properties with the About Portal component. Table B–27 lists the properties that have defaults other than those specified in Table B–2, "About Portal Component Display Options".

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Short Desc</td>
<td>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}.</td>
</tr>
<tr>
<td>Text</td>
<td>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}.</td>
</tr>
</tbody>
</table>

See Also: Display Options properties in the Component Properties dialog provide 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 the “Expression Language Expressions” appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

B.28.2 Portal Switcher Component Tag and XML

The following tag is used to render the Portal Switcher component on a .jspx page:
Example B–20 provides the XML code that represents the component in the resource catalog file (SiteTemplateCatalog.xml) in a Portal Framework application.

Example B–20  XML Code for the Portal Switcher Component

```xml
<tag>
  <name>portalsSwitcher</name>
  <tag-class>oracle.webcenter.webcenterapp.internal.view.taglib.
    portalsSwitcherTag</tag-class>
  <body-content>empty</body-content>
  <attribute>
    <name>id</name>
  </attribute>
  <attribute>
    <name>rendered</name>
    <deferred-value>
      <type>boolean</type>
    </deferred-value>
  </attribute>
  <attribute>
    <name>binding</name>
    <deferred-value/>
  </attribute>
  <attribute>
    <name>clientComponent</name>
    <deferred-value>
      <type>boolean</type>
    </deferred-value>
  </attribute>
  <attribute>
    <name>customizationId</name>
    <deferred-value/>
  </attribute>
  <attribute>
    <name>depressedIcon</name>
    <required>false</required>
    <deferred-value/>
  </attribute>
  <attribute>
    <name>disabled</name>
    <required>false</required>
    <deferred-value/>
  </attribute>
  <attribute>
    <name>disabledIcon</name>
    <required>false</required>
    <deferred-value/>
  </attribute>
  <attribute>
    <name>displayType</name>
    <required>false</required>
    <deferred-value/>
  </attribute>
</tag>
```
B.29 Print Preview

The Print Preview component is a link that opens a print preview of the current page in the browser (Figure B–27).

Figure B–27 Print Preview Component

This section lists and describes the Display Options associated with the Print Preview component. Additionally, it provides the tag that invokes this component on a .jspx page and the XML code that defines this component in a resource catalog.

This section includes the following subsections:

- Section B.29.1, "Print Preview Component Display Options"
Section B.29.2, "Print Preview Component Tag and XML"

B.29.1 Print Preview Component Display Options

The Print Preview component shares many of the same properties with the About Portal component. Table B–28 lists the properties that have defaults other than those specified in Table B–2, "About Portal Component Display Options".

See Also: The Print Preview component has Style properties you can use to change the component's look and feel. For more information, see Section 14.3.6, "Working with Style and Content Style Properties."

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Short Desc</td>
<td>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}.</td>
</tr>
<tr>
<td>Text</td>
<td>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}.</td>
</tr>
</tbody>
</table>

See Also: Display Options properties in the Component Properties dialog provide 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 the "Expression Language Expressions" appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

B.29.2 Print Preview Component Tag and XML

The following tag is used to render the Print Preview component on a .jspx page:

```xml
<wcdc:printPreview id="" xmlns:wcdc="http://xmlns.oracle.com/webcenter/spaces/taglib" text="#{uib_o_w_w_r_WebCenter.LABEL_PAGE_PRINT_PREVIEW}" shortDesc="#{uib_o_w_w_r_WebCenter.LABEL_PAGE_PRINT_PREVIEW}" inlineStyle="white-space:nowrap;"/>
```

Example B–21 provides the XML code that represents the component in the resource catalog file (SiteTemplateCatalog.xml) in a Portal Framework application.

Example B–21 XML Code for the Print Preview Component

```xml
<tag>
  <name>printPreview</name>
  <tag-class>oracle.webcenter.webcenterapp.internal.view.taglib.PrintPreviewTag</tag-class>
  <body-content>empty</body-content>
  <attribute>
    <name>id</name>
  </attribute>
  <attribute>
    <name>rendered</name>
    <deferred-value>
```

Example B–21 XML Code for the Print Preview Component

```xml
  </deferred-value>
</tag>
```
<attribute>
   <name>binding</name>
   <deferred-value/>
</attribute>

<attribute>
   <name>clientComponent</name>
   <deferred-value/>
   <type>boolean</type>
</deferred-value>
</attribute>

<attribute>
   <name>customizationId</name>
   <deferred-value/>
</attribute>

<attribute>
   <name>depressedIcon</name>
   <required>false</required>
   <deferred-value/>
</attribute>

<attribute>
   <name>disabled</name>
   <required>false</required>
   <deferred-value/>
</attribute>

<attribute>
   <name>disabledIcon</name>
   <required>false</required>
   <deferred-value/>
</attribute>

<attribute>
   <name>displayType</name>
   <required>false</required>
   <deferred-value/>
</attribute>

<attribute>
   <name>hoverIcon</name>
   <required>false</required>
   <deferred-value/>
</attribute>

<attribute>
   <name>icon</name>
   <required>false</required>
   <deferred-value/>
</attribute>

<attribute>
   <name>iconPosition</name>
   <required>false</required>
   <deferred-value/>
</attribute>

<attribute>
   <name>inlineStyle</name>
   <required>false</required>
   <deferred-value/>
</attribute>

<attribute>
   <name>shortDesc</name>
   <required>false</required>
</attribute>
B.30 Privacy URL

The Privacy URL component is a link that displays the application privacy statement (Figure B–28).

Figure B–28  Privacy URL Component

This section lists and describes the Display Options associated with the Privacy URL component. Additionally, it provides the tag that invokes this component on a .jspx page and the XML code that defines this component in a resource catalog.

This section includes the following subsections:

- Section B.30.1, "Privacy URL Component Display Options"
- Section B.30.2, "Privacy URL Component Tag and XML"

### B.30.1 Privacy URL Component Display Options

The Privacy URL component shares many of the same properties with the About Portal component. Table B–29 lists the properties that have defaults other than those specified in Table B–2, "About Portal Component Display Options".

**See Also:** The Privacy URL component has Style properties you can use to change the component’s look and feel. For more information, see Section 14.3.6, "Working with Style and Content Style Properties."

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Short Desc</td>
<td>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}.</td>
</tr>
<tr>
<td>Text</td>
<td>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}.</td>
</tr>
<tr>
<td>Type</td>
<td>The component type. The default is privacyURL.</td>
</tr>
</tbody>
</table>
See Also: Display Options properties in the Component Properties dialog provide 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 the "Expression Language Expressions" appendix in *Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper*.

### B.30.2 Privacy URL Component Tag and XML

The following tag is used to render the Privacy URL component on a .jspx page:

```
    type="privacyURL" displayType="link" inlineStyle="white-space:nowrap;"
    text="#{uib_o_w_w_r_WebCenter.PRIVACY_STMT}"
    shortDesc="#{uib_o_w_w_r_WebCenter.PRIVACY_STMT_DESC}"/>
```

In the resource catalog, the Privacy URL component uses the same XML code as the About WebCenter component. For more information, see Section B.4.2, "About WebCenter Component Tag and XML."

### B.31 RSS

The RSS component is a link that opens the RSS Manager (Figure B–29).

*Figure B–29  RSS Component*

The RSS Manager enables users to subscribe to news feeds from WebCenter Portal tools and services. For more information, see Chapter 54, "Adding RSS Feeds to a Portal."

This section lists and describes the Display Options associated with the RSS component. Additionally, it provides the tag that invokes this component on a .jspx page and the XML code that defines this component in a resource catalog.

This section includes the following subsections:

- Section B.31.1, "RSS Component Display Options"
- Section B.31.2, "RSS Component Tag and XML"

#### B.31.1 RSS Component Display Options

The RSS component shares many of the same properties with the About Portal component. Table B–30 lists the properties that have defaults other than those specified in Table B–2, "About Portal Component Display Options".

See Also: The RSS component has Style properties you can use to change the component's look and feel. For more information, see Section 14.3.6, "Working with Style and Content Style Properties."
**Table B–30  RSS Component Display Options**

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Short Desc</td>
<td>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}.</td>
</tr>
<tr>
<td>Text</td>
<td>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}.</td>
</tr>
<tr>
<td>Type</td>
<td>The component type. The default is rss.</td>
</tr>
</tbody>
</table>

**See Also:** Display Options properties in the Component Properties dialog provide 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 the “Expression Language Expressions” appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

**B.31.2 RSS Component Tag and XML**

The following tag is used to render the RSS component on a .jspx page:

```xml
<wcdc:spacesAction id="#"
    xmlns:wcdc="http://xmlns.oracle.com/webcenter/spaces/taglib"
    type="rss" displayType="link" text="#{uib_o_w_w_r_WebCenter.GLOBAL_LINK_RSS}" inlineStyle="white-space:nowrap;"/>
```

In the resource catalog, the RSS component uses the same XML code as the About WebCenter component. For more information, see Section B.4.2, "About WebCenter Component Tag and XML."

**B.32 Search**

**See Also:** Chapter 55, "Adding Search to a Portal"

The Search component provides a means entering search terms against the application or the current portal, depending on how its parameters are configured (Figure B–30).

**Note:** The tip text and operation of the Search box is dependent on the version of SES configured. For example, SES 11.2.2.2 displays tip text Search Everything in the Search box as shown in Figure B–30. SES 11.1.2.2 does not display any tip text. For more information, see Chapter 55, "Adding Search to a Portal" and the "Searching for Documents" section in Using Oracle WebCenter Portal.

![Search Component](image)
Self-Registration

**Note:** The Search component is a task flow and has no associated XML definition. This component is the same as the Search - Toolbar task flow available in the resource registry, along with other Search task flows (see Section 55.1.2, "Understanding Search with Oracle SES").

**See Also:** The Search component has Style properties you can use to change the component’s look and feel. For more information, see Section 14.3.6, "Working with Style and Content Style Properties."

### B.33 Self-Registration

The Self-Registration component is a link that opens the Self-Registration page (Figure B–31).

**Figure B–31 Self-Registration Component**

The Self-Registration page is a system page that enables users to create their own application login credentials. For more information, see Section 7.10, "Administering System Pages in a Portal," and the "Registering Yourself with WebCenter Portal" section in Using Oracle WebCenter Portal.

This section lists and describes the Display Options associated with the Self-Registration component. Additionally, it provides the tag that invokes this component on a .jspx page and the XML code that defines this component in a resource catalog.

This section includes the following subsections:

- **Section B.33.1, "Self-Registration Component Display Options"
- **Section B.33.2, "Self-Registration Component Tag and XML"

#### B.33.1 Self-Registration Component Display Options

The Self-Registration component shares many of the same properties with the About Portal component. Table B–31 lists the properties that have defaults other than those specified in Table B–2, "About Portal Component Display Options".

**See Also:** The Self-Registration component has Style properties you can use to change the component’s look and feel. For more information, see Section 14.3.6, "Working with Style and Content Style Properties."
### Table B–31  Self-Registration Component Display Options

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Short Desc</td>
<td>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}.</td>
</tr>
<tr>
<td>Text</td>
<td>Display text for the component. The default is Register. The default is the rendered value of the EL expression #{uib_o_w_w_r_WebCenter.GLOBAL_LINK_SELFREG}.</td>
</tr>
<tr>
<td>Type</td>
<td>The component type. The default is selfRegistration.</td>
</tr>
</tbody>
</table>

**See Also:** Display Options properties in the Component Properties dialog provide 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 the “Expression Language Expressions” appendix in *Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper*.

### B.33.2 Self-Registration Component Tag and XML

The following tag is used to render the Self-Registration component on a `.jspx` page:

```xml
<wcdc:spacesAction id="" xmlns:wcdc="http://xmlns.oracle.com/webcenter/spaces/taglib" type="selfRegistration" displayType="link" text="#\{uib_o_w_w_r_WebCenter.GLOBAL_LINK_SELFREG\}" shortDesc="#\{uib_o_w_w_r_WebCenter.GLOBAL_LINK_SELFREG_DESC\}" inlineStyle="white-space:nowrap"/>
```

In the resource catalog, the Self-Registration component uses the same XML code as the About WebCenter component. For more information, see Section B.4.2, “About WebCenter Component Tag and XML.”

### B.34 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–32).

**Figure B–32  Share Resource Component**

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 the "Sharing Messages, Files, and URLs" section in Using Oracle WebCenter Portal.

This section lists and describes the Display Options associated with the Share Resource component. Additionally, it provides the tag that invokes this component on a .jspx page and the XML code that defines this component in a resource catalog.

This section includes the following subsections:

- Section B.34.1, "Share Resource Display Options"
- Section B.34.2, "Share Resource Component Tag and XML"

B.34.1 Share Resource Display Options

The Share Resource component shares many of the same properties with the About Portal component. Table B–32 lists the properties that have defaults other than those specified in Table B–2, "About Portal Component Display Options".

See Also: The Share Resource component has Style properties you can use to change the component's look and feel. For more information, see Section 14.3.6, "Working with Style and Content Style Properties."

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
</table>
| Short Desc | A field for entering tooltip text to display when users hover their mouse pointers over the component. The default is Share Link. The default is the rendered value of the EL expression 
#{uib_o_w_w_r_WebCenter['NAV_TOOLS_ACTIONS_FOLDER_SHARE.TITLE']}.

| Text | Display text for the component. The default is Share Link. The default is the rendered value of the EL expression 
#{uib_o_w_w_r_WebCenter['NAV_TOOLS_ACTIONS_FOLDER_SHARE.TITLE']}.

See Also: Display Options properties in the Component Properties dialog provide access to an Expression Language (EL) editor for entering and testing EL values.

If you need EL assistance, an application developer can provide an EL expression; see the "Expression Language Expressions" appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

B.34.2 Share Resource Component Tag and XML

The following tag is used to render the Share Resource component on a .jspx page:

```xml
<wcdc:shareResource id="#" __taskFlowId="#"
xmlns:wcdc="http://xmlns.oracle.com/webcenter/spaces/taglib"
displayType="link" inlineStyle="white-space:nowrap;"
text="#{uib_o_w_w_r_WebCenter['NAV_TOOLS_ACTIONS_FOLDER_SHARE.TITLE']}"
shortDesc="#{uib_o_w_w_r_WebCenter['NAV_TOOLS_ACTIONS_FOLDER_SHARE.TITLE']}"/>
```

Example B–22 provides the XML code that represents the component in the resource catalog file (SiteTemplateCatalog.xml) in a Portal Framework application.
**Example B–22  XML Code for the Share Resource Component**

```xml
<tag>
    <name>shareResource</name>
    <tag-class>oracle.webcenter.webcenterapp.internal.view.taglib.ShareResourceTag</tag-class>
    <body-content>empty</body-content>
    <attribute>
        <name>id</name>
        <deferred-value/>
    </attribute>
    <attribute>
        <name>rendered</name>
        <deferred-value>
            <type>boolean</type>
            <required>false</required>
        </deferred-value>
    </attribute>
    <attribute>
        <name>binding</name>
        <deferred-value/>
    </attribute>
    <attribute>
        <name>clientComponent</name>
        <deferred-value>
            <type>boolean</type>
            <required>false</required>
        </deferred-value>
    </attribute>
    <attribute>
        <name>customizationId</name>
        <deferred-value/>
    </attribute>
    <attribute>
        <name>depressedIcon</name>
        <deferred-value/>
    </attribute>
    <attribute>
        <name>disabled</name>
        <deferred-value/>
    </attribute>
    <attribute>
        <name>disabledIcon</name>
        <deferred-value/>
    </attribute>
    <attribute>
        <name>displayType</name>
        <deferred-value/>
    </attribute>
    <attribute>
        <name>hoverIcon</name>
        <deferred-value/>
    </attribute>
    <attribute>
        <name>icon</name>
        <deferred-value/>
    </attribute>
</tag>
```
The Status Indicator component is an animated icon that spins when WebCenter Portal is processing information (Figure B–33).

**Figure B–33  Status Indicator Component**

This section lists and describes the Display Options associated with the Status Indicator component. Additionally, it provides the tag that invokes this component on a .jspx page and the XML code that defines this component in a resource catalog.

This section includes the following subsections:

- Section B.35.1, "Status Indicator Component Display Options"
- Section B.35.2, "Status Indicator Component Tag and XML"
B.35.1 Status Indicator Component Display Options

The Status Indicator component shares many of the same properties with the About Portal component. Table B–33 lists the properties that have defaults other than those specified in Table B–2, "About Portal Component Display Options".

**See Also:** The Status Indicator component has Style properties you can use to change the component’s look and feel. For more information, see Section 14.3.6, "Working with Style and Content Style Properties."

**Table B–33 Status Indicator Component Display Options**

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
<td>The component type</td>
</tr>
<tr>
<td></td>
<td>The default is statusIndicator.</td>
</tr>
</tbody>
</table>

**See Also:** Display Options properties in the Component Properties dialog provide 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 the "Expression Language Expressions" appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

B.35.2 Status Indicator Component Tag and XML

The following tag is used to render the Status Indicator component on a .jspx page:

```xml
<wcdc:spacesAction id="#"
    xmlns:wcdc="http://xmlns.oracle.com/webcenter/spaces/taglib"
    type="statusIndicator" displayType="link" />
```

In the resource catalog, the Status Indicator component uses the same XML code as the About WebCenter component. For more information, see Section B.4.2, "About WebCenter Component Tag and XML."

B.36 Subscription Preferences

The Subscription Preferences component is a link users can click to subscribe to notifications about specific types of activities that occur in the context of the portal (Figure B–34).

**Figure B–34 Subscription Preferences Component**

**See Also:** The "Setting Portal-Level Subscriptions" section in Using Oracle WebCenter Portal

This section lists and describes the Display Options associated with the Subscription Preferences component. Additionally, it provides the tag that invokes this component on a .jspx page and the XML code that defines this component in a resource catalog. This section includes the following subsections:
Section B.36.1, "Subscription Preferences Component Display Options"

Section B.36.2, "Subscription Preferences Component Tag and XML"

B.36.1 Subscription Preferences Component Display Options

The Subscription Preferences component shares many of the same properties with the About Portal component. Table B–34 lists the properties that have defaults other than those specified in Table B–2, "About Portal Component Display Options".

See Also: The Subscription Preferences component has Style properties you can use to change the component’s look and feel. For more information, see Section 14.3.6, "Working with Style and Content Style Properties."

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Short Desc</td>
<td>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}.</td>
</tr>
<tr>
<td>Text</td>
<td>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}.</td>
</tr>
</tbody>
</table>

See Also: Display Options properties in the Component Properties dialog provide 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 the "Expression Language Expressions" appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

B.36.2 Subscription Preferences Component Tag and XML

The following tag is used to render the Subscription Preferences component on a .jspx page:

```xml
<wcdc:notificationSubscriptionsLink id="#" __taskFlowId="#"
   xmlns:wcdc="http://xmlns.oracle.com/webcenter/spaces/taglib"
   text="#{uib_o_w_w_r_WebCenter.LABEL_SUBSCRIBE_TO_GET_NOTIFICATION}"
   shortDesc="#{uib_o_w_w_r_WebCenter.LABEL_SUBSCRIBE_TO_GET_NOTIFICATION}" />
```

Example B–23 provides the XML code that represents the component in the resource catalog file (SiteTemplateCatalog.xml) in a Portal Framework application.

Example B–23  XML Code for the Subscription Preferences Component

```xml
<tag>
  <name>notificationSubscriptionsLink</name>
  <tag-class>oracle.webcenter.webcenterapp.internal.view.
    taglib.NotificationSubscriptionsLinkTag</tag-class>
  <body-content>empty</body-content>
  <attribute>
    <name>id</name>
  </attribute>
</tag>
```
<name>rendered</name>
<deferred-value>
  <type>boolean</type>
</deferred-value>
</attribute>
<attribute>
  <name>binding</name>
  <deferred-value/>
</attribute>
<attribute>
  <name>clientComponent</name>
  <deferred-value>
    <type>boolean</type>
  </deferred-value>
</attribute>
<attribute>
  <name>customizationId</name>
  <deferred-value/>
</attribute>
<attribute>
  <name>depressedIcon</name>
  <required>false</required>
  <deferred-value/>
</attribute>
<attribute>
  <name>disabled</name>
  <required>false</required>
  <deferred-value/>
</attribute>
<attribute>
  <name>disabledIcon</name>
  <required>false</required>
  <deferred-value/>
</attribute>
<attribute>
  <name>displayType</name>
  <required>false</required>
  <deferred-value/>
</attribute>
<attribute>
  <name>hoverIcon</name>
  <required>false</required>
  <deferred-value/>
</attribute>
<attribute>
  <name>icon</name>
  <required>false</required>
  <deferred-value/>
</attribute>
<attribute>
  <name>iconPosition</name>
  <required>false</required>
  <deferred-value/>
</attribute>
<attribute>
  <name>inlineStyle</name>
  <required>false</required>
  <deferred-value/>
</attribute>
<attribute>
  <name>isDisabled</name>
  <deferred-value/>
</attribute>
<attribute>
  <name>isDepressed</name>
  <deferred-value/>
</attribute>
<attribute>
  <name>isHovered</name>
  <deferred-value/>
</attribute>
<attribute>
  <name>isHighlighted</name>
  <deferred-value/>
</attribute>
<attribute>
  <name>isFocused</name>
  <deferred-value/>
</attribute>
<attribute>
  <name>isHighlightedWhenFocused</name>
  <deferred-value/>
</attribute>
<attribute>
  <name>isRequired</name>
  <deferred-value/>
</attribute>
<attribute>
  <name>isStateful</name>
  <deferred-value/>
</attribute>
<attribute>
  <name>isPrepared</name>
  <deferred-value/>
</attribute>
B.37 Tags

The Tags component is an icon that users click to open the Add Tags dialog (Figure B–35).

Figure B–35 Tags Component

Add tags to associate personally meaningful search terms to a page or a portal item. For more information, see Chapter 56, "Adding Tagging to a Portal."

This section lists and describes the Display Options associated with the Tags component. Additionally, it provides the tag that invokes this component on a .jspx page and the XML code that defines this component in a resource catalog.

This section includes the following subsections:

- Section B.37.1, "Tags Component Display Options"
- Section B.37.2, "Tags Component Tag and XML"

B.37.1 Tags Component Display Options

Table B–35 lists and describes the Display Options associated with the Tags component.

See Also: The Tags component has Style properties you can use to change the component's look and feel. For more information, see Section 14.3.6, "Working with Style and Content Style Properties."
The following tag is used to render the Tags component on a .jspx page:

```
```

**Example B–24** provides the XML code that represents the component in the resource catalog file (SiteTemplateCatalog.xml) in a Portal Framework application.

```
<tag>
  <name>pageTags</name>
  <tag-class>oracle.webcenter.webcenterapp.internal.view.taglib.PageTagsTag</tag-class>
  <body-content>empty</body-content>
  <attribute>
    <name>id</name>
  </attribute>
  <attribute>
    <name>rendered</name>
    <deferred-value>
      <type>boolean</type>
    </deferred-value>
  </attribute>
  <attribute>
    <name>binding</name>
    <deferred-value/>
  </attribute>
  <attribute>
    <name>clientComponent</name>
    <deferred-value>
      <type>boolean</type>
    </deferred-value>
  </attribute>
</tag>
```

**Table B–35 Tags Component Display Options**

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Show Component</td>
<td>An option for hiding or showing the component on the page</td>
</tr>
<tr>
<td></td>
<td>■ Select to show the component</td>
</tr>
<tr>
<td></td>
<td>■ Deselect to hide the component</td>
</tr>
<tr>
<td></td>
<td>Once you hide a component in this way, any child components are also hidden. You can show the component again through Composer Structure view (see Section 12.4.1.3, ‘About Structure View in Composer’). Right-click the hidden component, and select <strong>Show Component</strong> from the resulting context menu.</td>
</tr>
<tr>
<td>Show Label</td>
<td>Display text for the component</td>
</tr>
<tr>
<td></td>
<td>By default, no display text is associated with the <strong>Tag</strong> icon.</td>
</tr>
<tr>
<td>Task Flow Id</td>
<td>The component's unique identifier, for example wcdc4082953494</td>
</tr>
</tbody>
</table>

**See Also:** Display Options properties in the Component Properties dialog provide 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 the “Expression Language Expressions” appendix in *Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper*.

### B.37.2 Tags Component Tag and XML

The following tag is used to render the Tags component on a .jspx page:

```
```

**Example B–24** provides the XML code that represents the component in the resource catalog file (SiteTemplateCatalog.xml) in a Portal Framework application.

**Example B–24 XML Code for the Tags Component**

```
<tag>
  <name>pageTags</name>
  <tag-class>oracle.webcenter.webcenterapp.internal.view.taglib.PageTagsTag</tag-class>
  <body-content>empty</body-content>
  <attribute>
    <name>id</name>
  </attribute>
  <attribute>
    <name>rendered</name>
    <deferred-value>
      <type>boolean</type>
    </deferred-value>
  </attribute>
  <attribute>
    <name>binding</name>
    <deferred-value/>
  </attribute>
  <attribute>
    <name>clientComponent</name>
    <deferred-value>
      <type>boolean</type>
    </deferred-value>
  </attribute>
</tag>
```
User Preferences

The User Preferences component is a link that opens the Preferences dialog (Figure B–36).

Figure B–36  User Preferences Component

![User Preferences Component](image)

User preferences enable users to configure their views of the application to suit their working styles. For more information, see the "Setting Your Personal Preferences" chapter in Using Oracle WebCenter Portal.

This section lists and describes the Display Options associated with the User Preferences component. Additionally, it provides the tag that invokes this component on a .jspx page and the XML code that defines this component in a resource catalog.

This section includes the following subsections:

- Section B.38.1, "User Preferences Component Display Options"
- Section B.38.2, "User Preferences Component Tag and XML"

B.38.1 User Preferences Component Display Options

The User Preferences component shares many of the same properties with the About Portal component. Table B–36 lists the properties that have defaults other than those specified in Table B–2, "About Portal Component Display Options".

See Also: The User Preferences component has Style properties you can use to change the component’s look and feel. For more information, see Section 14.3.6, "Working with Style and Content Style Properties."
### User Preferences Component Display Options

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Short Desc</td>
<td>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}.</td>
</tr>
<tr>
<td>Text</td>
<td>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}.</td>
</tr>
</tbody>
</table>

**See Also:** Display Options properties in the Component Properties dialog provide 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 the “Expression Language Expressions” appendix in Developing Portals with Oracle WebCenter Portal and Oracle JDeveloper.

### B.38.2 User Preferences Component Tag and XML

The following tag is used to render the User Preferences component on a `.jspx` page:

```xml
<wcdc:userPreferences id="" __taskFlowId=""
xmlns:wcdc="http://xmlns.oracle.com/webcenter/spaces/taglib"
displayType="link" inlineStyle="white-space:nowrap;" text="#{uib_o_w_w_r_WebCenter.GLOBAL_LINK_PREFERENCES}" shortDesc="#{uib_o_w_w_r_WebCenter.GLOBAL_LINK_PREFERENCES_DESC}"/>
```

**Example B–25** provides the XML code that represents the component in the resource catalog file (`SiteTemplateCatalog.xml`) in a Portal Framework application.

**Example B–25  XML Code for the User Preferences Component**

```xml
<tag>
  <name>userPreferences</name>
  <tag-class>oracle.webcenter.webcenterapp.internal.view.taglib.UserPreferencesTag</tag-class>
  <body-content>empty</body-content>
  <attribute>
    <name>id</name>
  </attribute>
  <attribute>
    <name>rendered</name>
    <deferred-value>
      <type>boolean</type>
    </deferred-value>
  </attribute>
  <attribute>
    <name>binding</name>
    <deferred-value/>
  </attribute>
  <attribute>
    <name>clientComponent</name>
    <deferred-value>
      <type>boolean</type>
    </deferred-value>
  </attribute>
</tag>
```
<attribute>
  <name>customizationId</name>
  <deferred-value/>
</attribute>
<attribute>
  <name>depressedIcon</name>
  <required>false</required>
  <deferred-value/>
</attribute>
<attribute>
  <name>disabled</name>
  <required>false</required>
  <deferred-value/>
</attribute>
<attribute>
  <name>disabledIcon</name>
  <required>false</required>
  <deferred-value/>
</attribute>
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</attribute>
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  <deferred-value/>
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  <required>false</required>
  <deferred-value/>
</attribute>
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  <required>false</required>
  <deferred-value/>
</attribute>
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  <deferred-value/>
</attribute>
<attribute>
  <name>shortDesc</name>
  <required>false</required>
  <deferred-value/>
</attribute>
<attribute>
  <name>styleClass</name>
  <required>false</required>
  <deferred-value/>
</attribute>
<attribute>
  <name>__taskFlowId</name>
  <required>false</required>
  <deferred-value/>
</attribute>
<name>text</name>
<required>false</required>
<deferred-value/>
</attribute>
</tag>
This appendix describes a variety of business scenarios that require creation of data visualization, and explains how to use WebCenter Portal’s Data Presenter to meet those requirements.

This appendix includes the following topics:

- Section C.1, "Presenting Data from Analytics"
- Section C.2, "Displaying Employee Data from SQL Data Control"
- Section C.3, "Presenting Data from the WebCenter Portal MDS Repository"
- Section C.4, "Presenting Data from a WebCenter Portal Web Service Data Source"
- Section C.5, "Building and Using a Custom Task Flow Style with Predefined Columns"
- Section C.6, "Building and Using a Custom Task Flow Style with Date Fields"
- Section C.7, "Presenting Data in a Master-Detail Relationship that Contains a Google Maps Task Flow"

**Permissions:** To perform the tasks in this appendix on shared Data Presenter assets, you need the application-level permission Create, Edit, and Delete for each of the different Data Presenter assets: Data Controls, Task Flows, and Task Flow Styles. Users with the Application Specialist role automatically have these permissions. For more information about application-level permissions, see the "About Application Roles and Permissions" section in *Administering Oracle WebCenter Portal*.

To perform the tasks in this appendix on portal-level Data Presenter assets, you need the portal-level permission Create, Edit, and Delete Assets (standard permissions) or Create, Edit, and Delete (advanced permissions) for each of the different Data Presenter assets. For more information about portal-level permissions, see Section 29.1, "About Roles and Permissions for a Portal."

**Note:** This appendix describes only the high level steps to perform a task. For the detailed steps, refer to Chapter 27, "Working with Data Presenter."
Sample Applications on OTN

Sample applications created for some of the examples in this appendix are available on Oracle Technology Network (OTN). The following page on OTN provides links to Data Presenter-specific samples and other sample applications that illustrate the different WebCenter Portal capabilities:

http://www.oracle.com/technetwork/middleware/webcenter/ps3-samples-176806.html

A readme file available with each sample describes what the application illustrates and provides guidance for extending or customizing the application for real life use cases.

C.1 Presenting Data from Analytics

Analytics displays metrics, such as community traffic, portlet traffic, searched keywords, response times, and usage behavior, for the entire WebCenter Portal application. This example describes how to create a task flow with data retrieved from the analytics data source. It includes the following topics:

- Section C.1.1, "Creating a Graph to Display Page Hits"
- Section C.1.2, "Using a Parameterized Task Flow to Display a Graph of Page Hits in a Portal"
- Section C.1.3, "Creating a Graph to View Portal Site Traffic Data"
- Section C.1.4, "Presenting Data with Two Task Flows in a Master-Detail Relationship"

If your system administrator has configured WebCenter Portal tools and services, WebCenter Portal provides an analytics connection, ActivitiesDS, out-of-the-box. You can use this connection to create a SQL data control and consume that data control as a graph to display statistics for the WebCenter Portal application.

Your system administrator configures analytics, as described in the "Managing Analytics" chapter in Administering Oracle WebCenter Portal.

C.1.1 Creating a Graph to Display Page Hits

To create a graph that displays statistics for pages in your application:

1. Create a SQL data control, PageStats, using the ActivitiesDS connection. Specify the following SQL query:

```
SELECT space.name_ spaceName, page.name_ pageName, space.id, page.id, count(1),
    fact.page_, page.resourceid_ FROM asfact_wc_pagevie_0 fact,
    asdim_wc_groupsp_0 space, asdim_wc_pages_0 page, asdim_wc_applica_0 app
WHERE space.id = fact.groupspace_ and page.id = fact.page_ and app.id =
    fact.application_ and fact.occurred between to_date(:startdate, :dateformat)
    and to_date(:enddate, :dateformat) and app.name_ = :appname and page.personal_ =
    :ispersonal and space.name_ is not null and page.name_ is not null and
    space.id is not null and page.id is not null
    and fact.page_ is not null and page.resourceid_ is not null GROUP BY
    space.name_, page.name_, space.id, page.id, fact.page_, page.resourceid_ ORDER
    BY count(1) desc
```

2. Set the bind variables as follows:

- **startdate** - 01/01/2013
- **dateformat** - MM/DD/YYYY
Presenting Data from Analytics

- **enddate** - 01/01/2014
- **appname** - webcenter
- **ispersonal** - 1

For the detailed steps, see Section 27.2.2.1, "Creating a SQL Data Control."

3. Expose the data control in the resource catalog by selecting the check box in the **Available** column.

For more information, see Section 20.5.3, "Showing and Hiding Assets."

4. Create a task flow, **Page Hits**, based on the **Blank** task flow style.

For the detailed steps, see Section 27.3.3, "Creating a Task Flow to Visualize Data."

5. Edit the task flow and from the inline resource catalog, add the **PageStats** data control accessor as a graph with the following options:
   - Select the **Bar** graph type.
   - On the Placement page, select **X Axis** for the **SPACENAME** and **PAGENAME** data columns and **Bars** for **COUNT_1**.
   - Accept the default values on all other pages of the wizard.

For the detailed steps, see Section 27.3.5.4, "Presenting Data as a Graph."

The resulting graph is shown in **Figure C–1**.

**Figure C–1  Bar Graph Displaying Page Hits**

---

**C.1.2 Using a Parameterized Task Flow to Display a Graph of Page Hits in a Portal**

In the previous example, you saw how to view page hits in your WebCenter Portal application. This example describes a similar scenario, but with the ability to display page hits for a specific portal only. In this case, a parameter form is included with the visualization of the data control. The parameter form enables users to specify a portal name and display statistics for that portal in the graph.

To create the data control:
Presenting Data from Analytics

1. Create a SQL data control, PageHits, using the ActivitiesDS connection. Specify the following SQL query

```sql
SELECT * FROM
(SELECT page.name_ pageName, space.name_ spaceName, COUNT(1) hits
FROM asdim_users u, asdim_wc_pages_0 page, asdim_wc_applica_0 app, asdim_wc_groupsp_0 space, asfact_wc_pagevie_0 fact
WHERE fact.page_ = page.id AND fact.userid = u.id AND fact.application_ = app.id
AND fact.groupspace_ = space.id AND fact.occurred BETWEEN (SYSDATE-6) AND (SYSDATE+1) AND app.name_ = 'webcenter'
AND u.userid <> 'anonymous'
AND upper(space.name_) LIKE upper(:portalname) AND space.name_ IS NOT NULL
AND page.name_ IS NOT NULL AND space.id IS NOT NULL AND page.id IS NOT NULL
AND fact.page_ IS NOT NULL AND page.resourceid_ IS NOT NULL
GROUP BY page.name_, space.name_ ORDER BY hits DESC)
WHERE rownum <= 5 ORDER BY rownum
```

2. Set the bind variables as follows:
   - **portalname** - Home Portal
     For the detailed steps, see Section 27.2.2.1, "Creating a SQL Data Control."

3. Test the query and view the data retrieved from the data source, as shown in Figure C–2.

   **Figure C–2  SQL Data Control Query Test Result**

<table>
<thead>
<tr>
<th>Bind Variable</th>
<th>Value</th>
<th>Type</th>
<th>Display Name</th>
<th>Tooltip</th>
</tr>
</thead>
<tbody>
<tr>
<td>portalname</td>
<td>Home Portal</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

4. Expose the data control in the resource catalog by selecting the check box in the Available column.
   For more information, see Section 20.5.3, "Showing and Hiding Assets."

5. Create a task flow, Top Five Page Hits for a Portal, based on the Blank task flow style.
   For the detailed steps, see Section 27.3.3, "Creating a Task Flow to Visualize Data."

6. Edit the task flow and from the inline resource catalog, add the PageHits data control accessor as a graph with the following options:
   - Select the Bar graph type.
   - On the Placement page, select X Axis for the PAGENAME and SPACENAME data columns and Bars for HITS.
On the Visualization Parameter page, select the check box next to the `portname` parameter.

Accept the default values on all other pages of the wizard.

For the detailed steps, see Section 27.3.5.4, "Presenting Data as a Graph."

The graph is displayed showing data for the Home portal (the portal chosen as the default for the `portname` bind variable when the data control was created).

7. Specify a different portal name in the `portname` field and click `Refresh`. The graph displays data specific to that portal (Figure C–3).

**Figure C–3 Bar Graph Displaying Page Hits for a Given Portal**

![Bar Graph Displaying Page Hits for a Given Portal]

C.1.3 Creating a Graph to View Portal Site Traffic Data

This example explains how to retrieve the site traffic data from analytics and display it as a pie graph.

To create a graph to view portal site traffic data:

1. Create a SQL data control, `PortalStats`, using the `ActivitiesDS` connection. Specify the following SQL query:

   ```sql
   SELECT 'Portals' AS Name, COUNT(1) AS Hits
   FROM asfact_wc_groupsp_0 fact, asdim_wc_groupsp_0 space, asdim_wc_applica_0 app
   WHERE space.id = fact.groupspace_ and app.id = fact.application_ and 
   fact.occurred between to_date(:startdate, :dateformat) and to_date(:enddate, :dateformat) and 
   app.name_ = :appname and 
   space.personal_ = :ispersonal
   UNION ALL
   SELECT 'Pages' AS Name, COUNT(1) AS Hits
   FROM asfact_wc_pagevie_0 fact, asdim_wc_pages_0 page, asdim_wc_applica_0 app
WHERE page.id = fact.page_ and app.id = fact.application_ and fact.occurred between to_date(:startdate, :dateformat) and to_date(:enddate, :dateformat) and app.name_ = :appname and page.personal_ = :ispersonal
UNION ALL
SELECT 'Portlets' Name, count(1) Hits 
FROM asfact_wc_portlet_0 fact , asdim_wc_applica_0 app 
WHERE app.id = fact.application_ and fact.occurred between to_date(:startdate, :dateformat) and to_date(:enddate, :dateformat) and app.name_ = :appname
UNION ALL
SELECT 'Logins' Name, count(1) Hits 
FROM asfact_wc_logins_0 fact , asdim_wc_applica_0 app 
WHERE app.id = fact.application_ and fact.occurred between to_date(:startdate, :dateformat) and to_date(:enddate, :dateformat) and app.name_ = :appname
UNION ALL
SELECT 'Searches' Name, count(1) Hits 
FROM asfact_wc_searche_0 fact , asdim_wc_applica_0 app 
WHERE app.id = fact.application_ and fact.occurred between to_date(:startdate, :dateformat) and to_date(:enddate, :dateformat) and app.name_ = :appname
UNION ALL
SELECT 'Wikis' Name, count(1) Hits 
FROM asfact_wc_doclib__0 fact , asdim_wc_documen_0 doc , asdim_wc_applica_0 app 
WHERE app.id = fact.application_ and fact.document_ = doc.id and fact.occurred between to_date(:startdate, :dateformat) and to_date(:enddate, :dateformat) and app.name_ = :appname and doc.objecttype_ like '%WIKI%'
UNION ALL
SELECT 'Blogs' Name, count(1) Hits 
FROM asfact_wc_doclib__0 fact , asdim_wc_documen_0 doc , asdim_wc_applica_0 app 
WHERE app.id = fact.application_ and fact.document_ = doc.id and fact.occurred between to_date(:startdate, :dateformat) and to_date(:enddate, :dateformat) and app.name_ = :appname and doc.objecttype_ like '%BLOG%'
UNION ALL
SELECT 'Documents' Name, count(1) Hits 
FROM asfact_wc_doclib__0 fact , asdim_wc_documen_0 doc , asdim_wc_applica_0 app 
WHERE app.id = fact.application_ and fact.document_ = doc.id and fact.occurred between to_date(:startdate, :dateformat) and to_date(:enddate, :dateformat) and app.name_ = :appname and doc.objecttype_ like '%DOCUMENT%'
UNION ALL
SELECT 'Discussions' Name, count(1) Hits 
FROM asfact_wc_discuss_1 fact , asdim_wc_applica_0 app 
WHERE app.id = fact.application_ and fact.occurred between to_date(:startdate, :dateformat) and to_date(:enddate, :dateformat) and app.name_ = :appname

2. Set the bind variables as follows:
   - **startdate** - 01/01/2013
   - **enddate** - 01/01/2014
   - **dateformat** - MM/DD/YYYY
3. Expose the data control in the resource catalog by selecting the check box in the **Available** column.

For more information, see Section 20.5.3, "Showing and Hiding Assets."

4. Create a task flow, **Portal Traffic**, based on the **Blank** task flow style.

For the detailed steps, see Section 27.3.3, "Creating a Task Flow to Visualize Data."

5. Edit the task flow and from the inline resource catalog, add the **PortalStats** data control accessor as a graph with the following options:

   - Select the **Pie** graph type.
   - On the Placement page, select **Slices** for the **NAME** data column and **Pie** for **HITS**.
   - Accept the default values on all other pages of the wizard.

For the detailed steps, see Section 27.3.5.4, "Presenting Data as a Graph."

The graph is displayed as shown in **Figure C–4**.

**Figure C–4  Graph Displaying Portal Traffic Statistics**

![Graph Displaying Portal Traffic Statistics](image)

C.1.4 Presenting Data with Two Task Flows in a Master-Detail Relationship

This example describes how to wire two task flows in a master-detail relationship so that a selection in one task flow results in an action on the second one.

This section includes the following topics:

- Section C.1.4.1, "Creating the Master Data Control and Task Flow"
- Section C.1.4.2, "Creating the Details Data Control and Task Flow"
- Section C.1.4.3, "Wiring the Master and Details Task Flows"

After performing the above configurations, if you click a user name in the master table, the details are displayed in a popup window.
C.1.4.1 Creating the Master Data Control and Task Flow

The master task flow displays a table with the top five page views for a given portal during the last seven days.

To create the task flow:

1. Create a SQL data control, TopFiveDocViewsForSelectedPortal, using the ActivitiesDS connection. Specify the following SQL query:

   ```sql
   select * from
   (select  u.id id , u.userid userid, count(fact.userid)  pageviews
    from asdim_users u , asfact_wc_pagevie_0 fact,asdim_wc_applica_0 app
    where fact.userid=u.id
    and u.userid <> 'anonymous'
    and fact.application_ = app.id
    and app.name_ = 'webcenter'
    and fact.occurred BETWEEN (SYSDATE-7) and ( SYSDATE+1)
    group by u.id,u.userid
    order by pageviews desc )
   where rownum<11
   ```

   For the detailed steps, see Section 27.2.2.1, "Creating a SQL Data Control."

   This query returns the top five page hits for a given portal for the last seven days.

2. Expose the data control in the resource catalog by selecting the check box in the Available column.

   For more information, see Section 20.5.3, "Showing and Hiding Assets."

3. Create a task flow, Top 10 Visitor Page Hits, based on the Blank task flow style.

   For the detailed steps, see Section 27.3.3, "Creating a Task Flow to Visualize Data."

4. Edit the task flow and from the inline resource catalog, add the TopFiveDocViewsForSelectedPortal data control accessor as a table with the following options:

   - Select the Read-only Table table type.
   - On the Columns page, select the USERID data column. From the Display As drop-down list, select Hyperlink, and in the URL field, enter http://www.oracle.com. Select the Open in New Window check box (Figure C–5).
   - Accept the default values on all other pages of the wizard.
Presenting Data from Analytics

C.1.4.2 Creating the Details Data Control and Task Flow

You have seen how to create a master task flow that displays the top page hits in a table, in which the user names are hyperlinked. The next step is to create a details task flow that is displayed on clicking a user name in the master task flow. This example describes how to create a details task flow that displays a graph of all page hits for a given user.

To create the details data control and task flow:

5. Save and close the task flow.

6. Expose the task flow in the resource catalog by selecting the check box in the Available column.

For more information, see Section 20.5.3, "Showing and Hiding Assets."

Figure C–5  Display Columns as Hyperlinks

The table displays a user-wise listing of the top page hits. The USERID column displays user names as hyperlinks, as shown in Figure C–6.

Figure C–6  Master Task Flow Displaying Top Page Hits

<table>
<thead>
<tr>
<th>ID</th>
<th>USERID</th>
<th>PAGE/VEWS</th>
</tr>
</thead>
<tbody>
<tr>
<td>436</td>
<td>weblogic</td>
<td>192</td>
</tr>
<tr>
<td>309</td>
<td>monty</td>
<td>41</td>
</tr>
<tr>
<td>371</td>
<td>vicki</td>
<td>38</td>
</tr>
<tr>
<td>792</td>
<td>ari</td>
<td>25</td>
</tr>
<tr>
<td>671</td>
<td>karen</td>
<td>16</td>
</tr>
</tbody>
</table>

5. Save and close the task flow.

6. Expose the task flow in the resource catalog by selecting the check box in the Available column.

For more information, see Section 20.5.3, “Showing and Hiding Assets.”
1. Create a SQL data control, `PageHitsForSelectedUser`, using the `ActivitiesDS` connection. Specify the following SQL query:

```sql
SELECT page.name_ as pageName, space.name_ as spaceName, COUNT(1) as hits
FROM asdim_users u, asdim_wc_pages_0 page, asdim_wc_applica_0 app,
    asdim_wc_groupsp_0 space, asfact_wc_pagevie_0 fact
WHERE fact.page_ = page.id AND fact.userid = u.id
    AND u.userid = (:userid) AND fact.application_ = app.id
    AND fact.groupspace_ = space.id AND fact.occurred BETWEEN (SYSDATE-7) and SYSDATE
    AND u.userid <> 'anonymous' AND space.name_ IS NOT NULL
    AND page.name_ IS NOT NULL AND space.id IS NOT NULL
    AND page.id IS NOT NULL AND fact.page_ IS NOT NULL
    GROUP BY page.name_, space.name_
```

2. Set the bind variables as follows:
   - `userid` - `weblogic`
   For the detailed steps, see Section 27.2.2.1, "Creating a SQL Data Control."

3. Expose the data control in the resource catalog by selecting the check box in the Available column.
   For more information, see Section 20.5.3, "Showing and Hiding Assets."

4. Create a task flow, `Page Hits for Selected User`, based on the Blank task flow style.
   For the detailed steps, see Section 27.3.3, "Creating a Task Flow to Visualize Data."

5. Edit the task flow and from the inline resource catalog, add the `PageHitsForSelectedUser` data control accessor as a graph with the following options:
   - Select the Bar graph type.
   - On the Placement page, select X Axis for the SPACENAME and PAGENAME data columns and Bars for HITS.
   - On the Visualization Parameter page, enter the following Default Value for the userid parameter:
     ```sql
     #{pageFlowScope.userid}
     ```
   - Accept the default values on all other pages of the wizard.

   Note that no data is displayed in the graph because the value of the userid bind variable has not yet been set to a specific value.

6. Create a task flow parameter, `userid`, and from the Storage drop-down list, select `pageFlowScope` to set the value to `#{pageFlowScope.userid}`, as shown in Figure C–7.
7. Save and close the task flow.
8. Expose the task flow in the resource catalog by selecting the check box in the Available column.
   For more information, see Section 20.5.3, "Showing and Hiding Assets."

C.1.4.3 Wiring the Master and Details Task Flows

This example describes how to wire the master and details task flows so that a user can click a user name in the master task flow to pop up the details task flow displaying the page hits graph for that user.

To wire the master and details task flows:

1. Edit the source of the master task flow, Top 10 Visitor Page Hits.
   For more information, see Section 20.4.2, "Editing the Source Code of an Asset."

2. In the Edit Source dialog, click the Fragment tab and paste the following code below `<af:panelGroupLayout id="pgl1">` to reference the details task flow in a popup:

   ```xml
   <af:popup id="popup1" launcherVar="source" eventContext="launcher" contentDelivery="lazyUncached">
     <af:dialog>
       <af:region xmlns:af="http://xmlns.oracle.com/adf/faces/rich" id="oc_449838760region1"
                 value="#{bindings.popTaskflow.regionModel}"/>
     </af:dialog>
     <af:setPropertyListener from="#{source.attributes.userid}" to="#{viewScope.userid}" type="popupFetch"/>
   </af:popup>
   ```
3. Find the `<goLink>` code segment and replace it with the following so that the USERID column displays command links that invoke a popup dialog:

```xml
<af:commandLink text="#{row.bindings.USERID.inputValue}" id='userLink'>
  <af:clientAttribute name="userid" value="#{row.bindings.USERID.inputValue}"/>
  <af:showPopupBehavior popupId="::popup1" alignId='userLink'
    align="afterEnd"/>
</af:commandLink>
```

4. Click the **Page Definition** tab, and add a reference to the details task flow. Paste the following code within the `<executable>` tag and below the `<iterator>` tag:

```xml
<taskFlow id="popTaskflow" taskFlowId="details_taskflow_definition_path" xmlns="http://xmlns.oracle.com/adf/controller/binding" Refresh="ifNeeded">
  <parameters>
    <parameter id="userid" value="#{viewScope.userid}"/>
  </parameters>
</taskFlow>
```

where **details_taskflow_definition_path** is the path to the **PageHitsForSelectedUser** task flow in your instance, for example, `/oracle/webcenter/siteresources/scopedMD/s8bba98ff_4cbb_40b8_beee_296c916a23ed/taskFlow/gsr34e6278e_9e9a_45eb_bbbf_31aa5ae34381/taskflow-definition.xml`

You can get this path by selecting the **PageHitsForSelectedUser** task flow and choosing **View Properties** from the **Actions** menu. The **Metadata File** attribute provides the complete path to the task flow.

5. To test the master-detail relationship, preview the **Top 10 Visitor Page Hits** task flow. When you click a user name link, for example `weblogic`, the page hits graph for that user is displayed in a popup window, as shown in **Figure C–8**.
C.2 Displaying Employee Data from SQL Data Control

The following examples describe how to display data retrieved from an employee database and customize the data visualization by performing a few simple configurations. They describe how to add the EmpDetails data control as a table to the Employee Details task flow and perform different customizations on the table, such as showing or hiding columns and sorting rows. It includes the following sections:

- Section C.2.1, "Creating the SQL Data Control and Consuming it in a Task Flow"
- Section C.2.2, "Adding a Parameter Form to a Data Visualization"
- Section C.2.3, "Binding Task Flow Parameters to Data Control Parameters"
- Section C.2.4, "Showing a Hidden Column in the Table"

C.2.1 Creating the SQL Data Control and Consuming it in a Task Flow

Perform the following tasks to create a data control for the employee database:

1. Create a connection to the employee database. For the detailed steps, see the "Creating a JDBC Data Source" section in Configuring and Managing JDBC Data Sources for Oracle WebLogic Server.

2. Create a SQL data control, EmpDetails, using this database connection. Specify the following SQL query:

   ```sql
   select ename, empno, mgr, deptno from emp where job in (:jobId) order by empno asc
   ```

   For the detailed steps, see Section 27.2.1.1, "Creating a SQL Data Control."
This query returns records for all employees whose designation matches the value of `jobId`. The records are sorted by employee number.

3. Set the bind variables as follows:
   - `jobId` - SALESMAN

   For the detailed steps, see Section 27.2.2.1, "Creating a SQL Data Control."

4. Expose the data control in the resource catalog by selecting the check box in the Available column.

   For more information, see Section 20.5.3, "Showing and Hiding Assets."

5. Create a task flow, Employee Details, based on the Blank task flow style.

   For the detailed steps, see Section 27.3.3, "Creating a Task Flow to Visualize Data."

6. Edit the task flow and from the inline resource catalog, add the `EmpDetails` data control accessor as a table with the following options:
   - Select the Read-only Table table type.
   - On the Type page, select Row Selection, Filtering, and Sorting.
   - On the Items page, move MGR to the Available Items list so that it is not displayed in the table. Leave ENAME, EMPNO, and DEPTNO in the Selected Items list.
   - Accept the default values on all other pages of the wizard.

   For the detailed steps, see Section 27.3.5.2, "Presenting Data as a Table."

The table displays with an empty field at the top of each column, as shown in Figure C–9. You can use those fields to specify filter criteria for the columns.

![Figure C–9 Table in the Employee Details Task Flow](image)

<table>
<thead>
<tr>
<th>ENAME</th>
<th>EMPNO</th>
<th>DEPTNO</th>
</tr>
</thead>
<tbody>
<tr>
<td>ALLEN</td>
<td>7499</td>
<td>30</td>
</tr>
<tr>
<td>WARD</td>
<td>7522</td>
<td>30</td>
</tr>
<tr>
<td>JONES</td>
<td>7566</td>
<td>20</td>
</tr>
<tr>
<td>MARTIN</td>
<td>7654</td>
<td>30</td>
</tr>
<tr>
<td>BLAKE</td>
<td>7698</td>
<td>30</td>
</tr>
<tr>
<td>CLARK</td>
<td>7782</td>
<td>10</td>
</tr>
<tr>
<td>TURNER</td>
<td>7844</td>
<td>30</td>
</tr>
</tbody>
</table>

C.2.2 Adding a Parameter Form to a Data Visualization

You can add a parameter form to a data visualization to provide an input field where users can specify a value. This value is passed to a data control accessor parameter so that the accessor displays data based on the user input.

To add a parameter form to a data visualization:

1. Create a task flow, Employee Details with Parameter Form, based on the Blank task flow style.

   For the detailed steps, see Section 27.3.3, "Creating a Task Flow to Visualize Data."

2. Edit the task flow and from the inline resource catalog, add the `EmpDetails` data control accessor as a table with the following options:
Select the **Read-only Table** table type.

- On the Type page, select **Row Selection, Filtering, and Sorting**.
- On the Items page, move **MGR** to the **Available Items** list so that it is not displayed in the table. Leave **ENAME, EMPNO, and DEPTNO** in the **Selected Items** list.
- On the Visualization Parameter page, select the check box next to the **jobId** parameter.
- Accept the default values on all other pages of the wizard.

You can now specify a value in the **jobId** input text field to view the corresponding records in the table.

### C.2.3 Binding Task Flow Parameters to Data Control Parameters

Perform the following steps to bind a task flow parameter to the data control parameter:

1. Edit the **Employee Details** task flow.
2. Create a task flow parameter, **designation**, and from the **Storage** drop-down list, select **pageFlowScope** to set the value to #{pageFlowScope.designation}.
3. Edit the table. In the Component Properties dialog, click the **Data** tab.

   **Tip:** Make sure you are editing the properties of the table and not the surrounding layout component. If necessary switch to Structure view, right-click the table and choose **Edit** from the context menu.

4. Set the **Default Value** of the **jobId** parameter to the storage value of the task flow parameter, #{pageFlowScope.designation}.

   This uses the **designation** task flow parameter to drive the data displayed in the table by setting the value of the **jobId** bind variable to be the same as the value specified for the **designation** parameter.

   For the detailed steps, see Section 27.3.6.3, "Binding a Data Control Parameter to a Task Flow Parameter."

5. Create a page and add the **Employee Details** task flow to the page.

   For the detailed steps, see Section 27.3.9, "Consuming a Task Flow in a Page."

6. Edit the Employee Details task flow on the page, and on the **Parameters** tab, specify a designation to view corresponding details in the table.

### C.2.4 Showing a Hidden Column in the Table

In your SQL query, you specified that the data control must retrieve the columns **ename, empno, deptno, and mgr**. However, you chose to display only the **ename, empno, and deptno** columns. In this case, the data control retrieves data from all four data columns, but displays only three. You can render the fourth column in the table by editing the table’s source code.

To show a hidden column in a table:

1. Edit the source of the **Employee Details** task flow.

   For more information, see Section 20.4.2, "Editing the Source Code of an Asset."
2. In the Edit Source dialog, click the **Fragments** tab, and locate the code for the hidden column. It would be similar to the code in the following example:

```xml
<column sortProperty="MGR" filterable="true" sortable="true"
        headerText="#{bindings.accessor_gsrf2d136f7_d907_481d_ad3a_
eb2b9ebc7c35.hints.MGR.label}"
        id="column4" rendered="false">
    <af:inputText value="#{row.bindings.MGR.inputValue}"
                  label="#{bindings.accessor_gsrf2d136f7_d907_481d_ad3a_
eb2b9ebc7c35.hints.MGR.label}"
                  required="#{bindings.accessor_gsrf2d136f7_d907_481d_ad3a_
eb2b9ebc7c35.hints.MGR.mandatory}"
                  columns="#{bindings.accessor_gsrf2d136f7_d907_481d_ad3a_
eb2b9ebc7c35.hints.MGR.displayWidth}"
                  maximumLength="#{bindings.accessor_gsrf2d136f7_d907_481d_ad3a_
eb2b9ebc7c35.hints.MGR.precision}"
                  shortDesc="#{bindings.accessor_gsrf2d136f7_d907_481d_ad3a_
eb2b9ebc7c35.hints.MGR.tooltip}"
                  id="inputText4">
        <f:validator binding="#{row.bindings.MGR.validator}"/>
        <af:convertNumber groupingUsed="false" pattern="#{bindings.accessor_
gsrf2d136f7_d907_481d_ad3a_eb2b9ebc7c35.hints.MGR.format}"
                        id="convertNumber3"/>
    </af:inputText>
</column>
```

3. Set the **rendered** attribute to **true**.

The table now displays all four columns, as shown in **Figure C–10**.

**Figure C–10  Table Displaying Four Columns**

<table>
<thead>
<tr>
<th>ENAME</th>
<th>EMPNO</th>
<th>DEPTNO</th>
<th>MGR</th>
</tr>
</thead>
<tbody>
<tr>
<td>ALLEN</td>
<td>7499</td>
<td>30</td>
<td>7698</td>
</tr>
<tr>
<td>WARD</td>
<td>7522</td>
<td>30</td>
<td>7698</td>
</tr>
<tr>
<td>JONES</td>
<td>7566</td>
<td>20</td>
<td>7839</td>
</tr>
<tr>
<td>MARTIN</td>
<td>7654</td>
<td>30</td>
<td>7698</td>
</tr>
<tr>
<td>BLAKE</td>
<td>7698</td>
<td>30</td>
<td>7839</td>
</tr>
<tr>
<td>CLARK</td>
<td>7782</td>
<td>10</td>
<td>7839</td>
</tr>
<tr>
<td>TURNER</td>
<td>7844</td>
<td>30</td>
<td>7698</td>
</tr>
</tbody>
</table>

Similarly, you can hide a visible column by setting its **rendered** attribute to **false**.

## C.3 Presenting Data from the WebCenter Portal MDS Repository

A WebCenter Portal application is seeded with the following repository connections:

- **WebCenterDS**
- **mds-owsm**
- **mds-SpacesDS**
- **ActivitiesDS**

You can create data controls for any of these connections and consume them in task flows. This example describes how to create a data control to connect to the WebCenter
Portal repository and display details about the portals and pages in the application and so on.

To present data from the WebCenter Portal MDS repository:

1. Create a SQL data control, WebCenterPages, using the mds-SpacesDS connection. Specify the following SQL query:
   
   ```sql
   select 'Home Portal Pages' metric, count(*) value from mds_paths where path_type = 'DOCUMENT'
   and path_name like '%.jspx' and path_high_cn is null and path_fullname like '%/user/%'
   union select 'Business Role Pages' metric, count(*) value from mds_paths where path_type = 'DOCUMENT'
   and path_name like '%.jspx' and path_high_cn is null and path_fullname like '%/businessRolePages/%'
   union select 'Portal Template Pages' metric, count(*) value from mds_paths where path_type = 'DOCUMENT'
   and path_name like '%.jspx' and path_high_cn is null and path_fullname like '%/spacetemplate/%'
   union select 'Portal Pages' metric, count(*) value from mds_paths where path_type = 'DOCUMENT'
   and path_name like '%.jspx' and path_high_cn is null and (path_fullname not like '%/user/%'
   and path_fullname not like '%/businessRolePages/%' and path_fullname not like '%/spacetemplate/%')
   ```

   This query retrieves page-related data from the WebCenter Portal data source and a count of each page type, as shown in Figure C–11.

   **Figure C–11  Data Control with Page Information from the WebCenter Portal Repository**

   ![Data Control with Page Information from the WebCenter Portal Repository](image)

   This type of information can be represented either in a table or a graph. This example adds the data control as a graph.

2. Expose the data control in the resource catalog by selecting the check box in the Available column.

   For more information, see Section 20.5.3, "Showing and Hiding Assets."

3. Create a task flow, Page Metrics, based on the Blank task flow style.

   For the detailed steps, see Section 27.3.3, "Creating a Task Flow to Visualize Data."

4. Edit the task flow and from the inline resource catalog, add the WebCenterPages data control accessor as a graph with the following options:

   - Select the Pie graph type.
   - On the Placement page, select Slices for the METRIC data columns and Pie for VALUE.
   - Accept the default values on all other pages of the wizard.
Presenting Data from a WebCenter Portal Web Service Data Source

You can create a data control to the WebCenter Portal web service and retrieve information about the application and portals, for example, list the portals in the instance. However, you must first prepare WebCenter Portal to expose web services.

Getting Started
Before you begin with the following examples, you must configure WS-Security for WebCenter Portal. For the detailed steps, see the "Configuring WS-Security" chapter in Administering Oracle WebCenter Portal. If you do not configure WS-Security, an error occurs when retrieving data from the data source.

This section describes the following use cases:

- Section C.4.1, "Listing the Portals in WebCenter Portal"
- Section C.4.2, "Using a Form to Rename a Portal"

C.4.1 Listing the Portals in WebCenter Portal
This example describes how to use the WebCenter Portal web service to display a list of portals. The portal names are displayed as hyperlinks so that users can click a link to view the selected portal.

To list the portals in WebCenter Portal:

1. Create a web service data control, ListPortals, (Figure C–13) using a WSDL URL with the appropriate machine name and port number, for example:

   http://myserver.example.com:8888/webcenter/SpacesWebService?WSDL

   For the detailed steps, see Section 27.2.2.2, "Creating a Web Service Data Control."
2. Click **Show Methods** to view the methods provided by the web service.

3. From the **Methods** list, select **getGroupSpaces**.

4. In the Oracle Web Service Manager Security Policies section, apply the following additional policy:

   ```
   oracle/wss11_saml_token_with_message_protection_client_policy
   ```

   **Tip:** You must click **Next** before you can create the data control.

5. Expose the data control in the resource catalog by selecting the check box in the **Available** column.

   For more information, see **Section 20.5.3, "Showing and Hiding Assets."**

6. Create a task flow, **Portals**, based on the **Blank** task flow style.

   For the detailed steps, see **Section 27.3.3, "Creating a Task Flow to Visualize Data."**

7. Edit the task flow and from the inline resource catalog, add the **Return** attribute of the **getGroupSpaces** method of the **ListPortals** data control as a table with the following options:

   - Select the **Read-only Table** table type.
   - On the Columns page (**Figure C–14**), select the **item** column. From the **Display As** drop-down list, select **Hyperlink**, and in the **URL** field, enter the URL to which the portal name must be appended, for example:

     ```
     /spaces/#{row.item}
     ```

     Select the **Open in New Window** check box.

   - Accept the default values on all other pages of the wizard.
For the detailed steps, see Section 27.3.5.2, "Presenting Data as a Table."

**Figure C–14  Hyperlink Option on the Columns Page of the Create Table Dialog**

The table is displayed as shown in Figure C–15

**Figure C–15  Task Flow Displaying a List of Portals**

<table>
<thead>
<tr>
<th>Portals</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>RuntimeTools</td>
<td></td>
</tr>
<tr>
<td>MyPortal</td>
<td></td>
</tr>
<tr>
<td>Page Metrics</td>
<td></td>
</tr>
</tbody>
</table>

### C.4.2 Using a Form to Rename a Portal

This example describes how to use the WebCenter Portal web service to create a form that can be used to rename a given portal.

To use a form to rename a portal:

1. Create a web service data control, RenamePortal, using a WSDL URL with the appropriate machine name and port number, for example:
   
   http://myserver.example.com:8888/webcenter/SpacesWebService?WSDL

   For the detailed steps, see Section 27.2.2.2, "Creating a Web Service Data Control."

2. Click **Show Methods** to view the methods provided by the web service.

3. From the **Methods** list, select **renameGroupSpace**.
4. In the Oracle Web Service Manager Security Policies section, apply the following additional policy:

```
oracle/wss11_saml_token_with_message_protection_client_policy
```

**Tip:** You must click Next before you can create the data control.

5. Expose the data control in the resource catalog by selecting the check box in the Available column.

For more information, see Section 20.5.3, "Showing and Hiding Assets."

6. Create a task flow, Rename Portal, based on the Blank task flow style.

For the detailed steps, see Section 27.3.3, "Creating a Task Flow to Visualize Data."

7. Edit the task flow and from the inline resource catalog, add the `renameGroupSpace` method of the RenamePortal data control as an ADF Button.

8. Add the arg1 and arg0 attributes as ADF Input Text w/Label.

This step adds two input text fields, where users can specify the old portal name and new portal name, and a button for applying the change.

9. Save and close the task flow.

10. Change the labels for the input text fields:

   a. Select the task flow. From the Actions menu, select Edit Source and then click the Fragment tab.
   
   b. Replace the label value for the first inputText component (`#{bindings.arg0.hints.label}`) to Old Portal Name.
   
   c. Replace the label value for the second inputText component (`#{bindings.arg1.hints.label}`) to New Portal Name.
   
   d. Click Save and Close.

The task flow now appears as shown in Figure C–16.

![Figure C–16  Task Flow to Change a Portal Name](image)

11. Expose the task flow in the resource catalog by selecting the check box in the Available column.

For more information, see Section 20.5.3, "Showing and Hiding Assets."

You can now add this task flow to any page and provide the capability to change portal names.
C.5 Building and Using a Custom Task Flow Style with Predefined Columns

This example describes how to create a custom task flow style and use that style to create a task flow. The custom style is designed to list the top five page hits in a portal in a layout similar to the WebCenter Portal Activity Stream layout. An input text field enables users to specify a portal name to view page hits for that portal.

This section includes the following topics:

- Section C.5.1, "Building the Custom Task Flow Style"
- Section C.5.2, "Creating a Task Flow Based on the Custom Style"

C.5.1 Building the Custom Task Flow Style

As WebCenter Portal does not provide a Create option for task flow styles, the only way to build a new task flow style is by copying an existing task flow style and replacing its source code.

To build the custom task flow style:

1. Create a copy of the Blank task flow style and name it PageHitsStyle.

   For the detailed steps, see Section 20.5.4, "Copying an Asset."

2. Edit the source of PageHitsStyle and replace the code on the Fragment tab with the following:

```xml
<?xml version='1.0' encoding='UTF-8'?>
<jsp:root xmlns:jsp="http://java.sun.com/JSP/Page" version="2.1"
  xmlns:pe="http://xmlns.oracle.com/adf/pageeditor"
  xmlns:cust="http://xmlns.oracle.com/adf/faces/customizable"
  xmlns:f="http://java.sun.com/jsf/core"
  xmlns:af="http://xmlns.oracle.com/adf/faces/rich">
  <af:panelGroupLayout id="pgl1">
    <af:panelGroupLayout id="pg2" layout="horizontal" halign="center"
      inlineStyle="padding-bottom:5px;">
      <af:inputText id="ip1" value="#{pageFlowScope.bindVarId}"
        label="Portal Name"
        shortDesc="Enter A Portal Name, by default it's all portals"/>
      <af:commandButton text="#{dataComposerBundle.MASHUP_STYLES_GO}" id="cb1"/>
    </af:panelGroupLayout>
    <cust:panelCustomizable id="pc1">
      <table border="0" width="100%">
        <af:iterator id="i1" value="#{dataPresenter.dummyData.collectionModel}"
          var="row">
          <tr class="PortletText1">
            <td width="12px">
              <af:image id="img1" source="/adf/webcenter/star_sm_ena.png"/>
            </td>
            <td>
              <af:outputText id="otCol1" value="#{empty row.USERNAME ? '
                '#{row.USERNAME}' : row.USERNAME}"
                inlineStyle="color:#333333; font-size:12px;"/
                font-weight:bold;"/>
              <af:spacer id="spacer1" width="5px"/>
              <af:outputText id="otCol2" value="viewed" inlineStyles="color:#333333; font-size:12px;"/>
              <af:spacer id="spacer2" width="5px"/>
            </td>
          </tr>
        </af:iterator>
      </table>
    </cust:panelCustomizable>
  </af:panelGroupLayout>
</jsp:root>
```
where:

#{pageFlowScope.bindVarId} is a reference that provides the input portal name

#{dataPresenter.dummyData.collectionModel} is a dummy reference that gets replaced when you use the task flow style

#{row.COLUMN} are placeholders that will reference data from data controls when the task flow style is used

(doc path prefix) is the prefix to be used for the document URL. To find the prefix for a document path, select a document on the Documents page and click Get a Link from the View menu. The first part of the Download URL (ending in path) is the prefix to be used. For example:

http://www.example.com:8889/webcenter/content/conn/example-ucm/path

If you preview the task flow style, it displays as shown in Figure C–17.
3. Expose the task flow style by selecting the check box in the Available column.

For more information, see Section 20.5.3, "Showing and Hiding Assets."

You can use this task flow style to build task flows that display page hits.

C.5.2 Creating a Task Flow Based on the Custom Style

This example describes how to use the PageHits task flow style to create a task flow that displays page hits in an Activity Stream layout. To illustrate this, you must create a SQL data control using the ActivitiesDS database connection, then consume the data control in a task flow based on the PageHits task flow style. However, to display the data from the data control in an Activity Stream layout instead of the typical table or graph layout, you must perform the following tasks:

- Create a SQL data control.
- Create a task flow based on the new PageHits task flow style.
- Add the data control as a table.
- Copy the data control's accessor ID from the table's properties.
- Hide the table.
- Wire the input text field in the task flow to the data control using the accessor ID.

To create a task flow based on the custom style:

1. Create a SQL data control, TopFiveViewedDocumentsinaGivenPortal, using the ActivitiesDS connection. Specify the following query:

   ```sql
   SELECT * FROM
   (SELECT users.userid username, doc.name_ docname, doc.path_ download_url,
   count(1) hits, max(fact.occurred) lastviewed
   FROM asfact_wc_doclib__0 fact, asdim_wc_documen_0 doc, asdim_wc_applica_0
   app, asdim_wc_groups_0 space, asdim_users users
   WHERE app.id = fact.application_
   AND app.name_ = 'webcenter'
   AND fact.occurred BETWEEN (SYSDATE-7) AND SYSDATE
   AND fact.document_ = doc.id
   AND doc.name_ is not null
   AND doc.id is not null
   AND fact.document_ is not null
   AND doc.resourceid_ is not null
   AND fact.GROUPSPACE_ = space.id
   AND upper(space.name_) LIKE upper(:portalname)
   AND space.name_ IS NOT NULL
   AND fact.userid=users.id
   GROUP BY users.userid, doc.name_,doc.path_
   ORDER BY hits DESC)
   ```
WHERE rownum <= 5
ORDER BY rownum

2. Set the bind variables as follows:
   • portalname - Home Portal
   For the detailed steps, see Section 27.2.2.1, "Creating a SQL Data Control."

3. Expose the data control in the resource catalog by selecting the check box in the Available column.
   For more information, see Section 20.5.3, "Showing and Hiding Assets."

4. Create a task flow, Top Five Viewed Documents in a Given Portal, using the PageHits task flow style, as shown in Figure C–18.

**Figure C–18  Create New Task Flow Dialog with PageHits Style**

5. Edit the task flow and from the inline resource catalog, add the TopFiveViewedDocumentsinaGivenPortal data control accessor as a table with the following options:
   • Select the Read-only Table table type.
   • On the Visualization Parameter page, enter the following Default Value for the portalname parameter:
     #{pageFlowScope.bindVarId}
   • Accept the default values on all other pages of the wizard.
   For the detailed steps, see Section 27.3.5.2, "Presenting Data as a Table."

6. To get the accessor ID:
   a. Switch to Structure view of the task flow, right-click the table component, and choose Edit.
   b. In the Component Properties dialog, copy the value of the Value attribute. This is the accessor ID for the data control. The value may be similar to the following:
     #{bindings.accessor_gsraffebf20_b500_4880f_bf92_a9d33922a0a7.collectionModel}
7. Select the showDetailFrame component wrapping the table and choose Hide Component on the context menu.

8. Right-click the iterator component, and choose Edit.

9. Replace the value in the Value field with the accessor ID you copied from the table's properties.

   You now have a task flow with the Activity Stream-like seeded layout.

10. Save and close the task flow.

11. Expose the task flow in the resource catalog by selecting the check box in the Available column.

   For more information, see Section 20.5.3, "Showing and Hiding Assets."

12. Consume the task flow in a page. It appears as shown in Figure C–19.

---

**Figure C–19 Page Displaying Top Five Page Hits in a Portal**

---

**C.6 Building and Using a Custom Task Flow Style with Date Fields**

This example describes how to create a custom task flow style with fields to specify a date range and a content area to display a visualization of data for the specified date range. Figure C–20 shows a task flow created using such a task flow style. The example also describes how to create a task flow using the custom style.

This section includes the following topics:

- Section C.6.1, "Building the Custom Task Flow Style"
- Section C.6.2, "Creating a Task Flow Based on the Custom Style"
C.6.1 Building the Custom Task Flow Style

As WebCenter Portal does not provide a Create option for task flow styles, the only way to build a new task flow style is by creating a copy of an existing task flow style and replacing its source code.

To build the custom task flow style:

1. Create a copy of the Blank task flow style and name it Input Dates.

   For the detailed steps, see Section 20.5.4, "Copying an Asset."

2. Edit the source of Input Dates and replace the code on the Fragment tab with the following:

```xml
<?xml version='1.0' encoding='UTF-8'?>
<jsp:root xmlns:jsp="http://java.sun.com/JSP/Page" version='2.1'
    xmlns:pe="http://xmlns.oracle.com/adf/pageeditor"
    xmlns:cust="http://xmlns.oracle.com/adf/faces/customizable"
    xmlns:f="http://java.sun.com/jsf/core"
    xmlns:af="http://xmlns.oracle.com/adf/faces/rich">
    <af:panelGroupLayout id="pg1">
        <af:panelGroupLayout id="pg2" layout="horizontal" halign="center"
            inlineStyle="padding-bottom:5px;">
            <af:panelFormLayout id="pf11" partialTriggers="ipl"
                inlineStyle="padding-bottom:5px;">
                <af:inputDate id="ipl" value="#{pageFlowScope.bindVarId1}" label="Start Date" autoSubmit="true"/>
                <af:inputDate id="ip2" value="#{pageFlowScope.bindVarId2}" label="End Date"/>
                <af:commandButton text="#{dataComposerBundle.MASHUP_STYLES_GO}" id="cb1"/>
            </af:panelFormLayout>
        </af:panelGroupLayout>
    </af:panelGroupLayout>
</jsp:root>
```
The `inputDate` components provide the two date fields, and the `panelCustomizable` provides the content area. When previewed, the task flow style appears as shown in Figure C–21.

![Figure C–21: Preview of Custom Style with Date Fields](image)

3. Expose the task flow style by selecting the check box in the Available column.

   For more information, see Section 20.5.3, "Showing and Hiding Assets."

   You can use this task flow style to build a task flow and populate the content area with a visualization of your choice.

### C.6.2 Creating a Task Flow Based on the Custom Style

This example describes how to use the `Input Dates` task flow style to create a task flow that displays a graph of the page hits for a specified date range. To illustrate this, you must create a SQL data control using the `ActivitiesDS` database connection, then consume the data control in a task flow based on the `Input Dates` task flow style.

To use the custom task flow style:

1. Create a SQL data control, `Page Usage Between Two Dates`, using the `ActivitiesDS` connection. Specify the following SQL query:

   ```sql
   SELECT page.name_ pageName, space.name_ spaceName, COUNT(1) hits
   FROM asdim_users u, asdim_wc_pages_0 page, asdim_wc_applica_0 app, asdim_wc_groupsp_0 space, asfact_wc_pagevie_0 fact
   WHERE
   app.name_ = 'webcenter'
   AND fact.page_ = page.id
   AND fact.userid = u.id
   AND fact.application_ = app.id
   AND fact.groupspace_ = space.id
   AND fact.occurred BETWEEN to_timestamp_tz(to_char(:startdate), :dateformat)
   AND to_timestamp_tz(to_char(:enddate), :dateformat)
   AND space.name_ IS NOT NULL
   AND page.name_ IS NOT NULL
   AND page.id IS NOT NULL
   AND fact.page_ IS NOT NULL
   AND page.resourceid_ IS NOT NULL
   GROUP BY page.name_, space.name_
   ```

2. Set the bind variables as follows:

   - `startdate` - 01/01/2013
- **dateformat** - MM/DD/YYYY
- **enddate** - 01/01/2014

3. Expose the data control in the resource catalog by selecting the check box in the Available column.
   For more information, see Section 20.5.3, "Showing and Hiding Assets."

4. Create a task flow, *Page Usage Between Two Dates*, using the **Input Dates** task flow style, as shown in **Figure C–22**.

**Figure C–22**  **Input Dates Task Flow Style in the Create New Task Flow Dialog**

5. Edit the task flow and add the **Page Usage Between Two Dates** data control accessor as a graph with the following options:
   - Select the **Bar** graph type.
   - On the Placement page, select X Axis for the **PAGENAME** and **SPACENAME** data columns, and Bars for HITS.
   - Accept the default values on all other pages of the wizard.

6. The graph displays data for the default dates. Change the **Start Date** and **End Date** then click **Go** to display different data (Figure C–23).
C.7 Presenting Data in a Master-Detail Relationship that Contains a Google Maps Task Flow

This example describes how to display two task flows wired in a master-detail relationship so that a selection in the master task flow results in an update to the Google Map address in the details task flow, as shown in Figure C–24.
The steps to build such a task flow include:

- Creating a SQL data control to retrieve static data for the purpose of the demo.
- Creating a master task flow that consumes this data control as a static table.
- Adding hyperlinks in the user names column in the table.
- Creating a details task flow to integrate the latest Google Maps API Version 3.
- Wiring the master and detail task flows so that clicking a record in the master table results in a location change in the Google Map.

This section includes the following topics:

- Section C.7.1, "Creating the Data Control"
- Section C.7.2, "Creating the Details Task Flow"
- Section C.7.3, "Creating the Master Task Flow"
- Section C.7.4, "Wiring the Master and Details Task Flows"

### C.7.1 Creating the Data Control

For the purpose of this example, create a data control to get address data using `select * from dual` statements. You can use any existing data source connection to create the data control. In real time, you must replace it with the required SQL data source connection.

To create the data control:
1. Create a SQL data control, addresses, using any available database connection, and specify the following query:

   ```sql
   SELECT 'Steve' Buddy, 'Palo Alto' City, 'CA' State
   FROM dual
   UNION
   SELECT 'Doris' Buddy, 'Belmont' City, 'CA' State
   FROM dual
   UNION
   SELECT 'John' Buddy, 'New York' City, 'NY' State
   FROM dual
   UNION
   SELECT 'Lily' Buddy, 'Boston' City, 'MA' State
   FROM dual
   ```

2. Expose the data control in the resource catalog by selecting the check box in the Available column.

   For more information, see Section 20.5.3, "Showing and Hiding Assets."

### C.7.2 Creating the Details Task Flow

This example describes how to create a details task flow that will display the Google map.

To create the details task flow:

1. Create a task flow, Basic Maps, based on the Blank task flow style.
2. Edit the source code of the task flow.

   For more information, see Section 20.4.2, "Editing the Source Code of an Asset."

3. In the Edit Source dialog, replace the code on the Fragment tab with the following:

   ```xml
   <?xml version='1.0' encoding='UTF-8'?>
   <jsp:root xmlns:jsp="http://java.sun.com/JSP/Page" version="2.1"
    xmlns:pe="http://xmlns.oracle.com/adf/pageeditor"
    xmlns:cust="http://xmlns.oracle.com/adf/faces/customizable"
    xmlns:f="http://java.sun.com/jsf/core"
    xmlns:af="http://xmlns.oracle.com/adf/faces/rich"
    xmlns:trh="http://myfaces.apache.org/trinidad/html">
     <af:resource type="javascript"
      source="http://maps.google.com/maps/api/js?sensor=true"/>
     <af:resource type="javascript">
      var geocoder;
      var map;
      function initialize(){
       geocoder = new google.maps.Geocoder();
       var latlng = new google.maps.LatLng(37.529526, -122.263969);
       var myOptions = {
       zoom: 3,
       center: latlng,
       mapTypeId: google.maps.MapTypeId.ROADMAP
       };
       map = new google.maps.Map(document.getElementById("map_canvas"),myOptions);
      }
      function navigate(event) {
       initialize();
       var city= event.getSource().getProperty('city')+'';
       var state= event.getSource().getProperty('state')+'';
       var address;
       if(city == 'undefined'||state == "undefined"||city == 'NULL'||state == "NULL"){
       address = null;
       }
   ```
address="CA, USA";
} else {
  map.setZoom(8);
  address=city+" *state* USA";
}

googlemap.setAddress(address, function(results, status)
{
  if (status == google.maps.GeocoderStatus.OK) {
    map.setCenter(results[0].geometry.location);
    var marker = new google.maps.Marker({
      map: map,
      position: results[0].geometry.location
    });
  } else {
    alert("Geocode was not successful for the following reason: " + status);
  }
});
</af:resource>

The code in bold, <af:inline>, calls the navigate Google Map javascript method each time the page is loaded, and it parses two pageFlowScope parameters to the navigate method to update the address on the map.

4. Click Save and Close.
5. Edit the task flow and click Task Flow Properties.
6. Create two string task flow parameters, as shown in Table C–1 and Figure C–25:

<table>
<thead>
<tr>
<th>Name</th>
<th>Type</th>
<th>Storage</th>
</tr>
</thead>
<tbody>
<tr>
<td>city</td>
<td>string</td>
<td>#{pageFlowScope.city}</td>
</tr>
<tr>
<td>state</td>
<td>string</td>
<td>#{pageFlowScope.state}</td>
</tr>
</tbody>
</table>
C.7.3 Creating the Master Task Flow

This example describes how to create the master task flow to consume the addresses data control as a table and the Basic Maps task flow.

To create the master task flow:

1. Create a task flow, Address on Google Maps, based on the Blank task flow style.
2. Edit the task flow and add the Basic Maps task flow, as shown in Figure C–26.
3. Add the addresses data control accessor as a **Read-only Table** with **Row Selection** enabled.

The master task flow displays the addresses table on top and the map below it, as shown in Figure C–27.
C.7.4 Wiring the Master and Details Task Flows

This example describes how to wire the master and details task flows so that a user can click a name in the table to show the corresponding location in the map.

To wire the master and details task flows:

1. Edit the master task flow, Address on Google Maps, and edit the properties of the Basic Maps task flow (Figure C–28).

Figure C–27  Master-Detail Task Flow with Table and Google Map
Tip: If you cannot see the Edit icon for the Basic Maps task flow, try hiding the inline resource catalog.

2. In the Component Properties dialog, modify the values for the two task flow parameters, City and State, as follows:

   City: #{empty dataComposerViewContext.dataSelection.CITY ? 'NULL' : dataComposerViewContext.dataSelection.CITY}

   State: #{empty dataComposerViewContext.dataSelection.STATE ? 'NULL' : dataComposerViewContext.dataSelection.STATE}

   Figure C–29 Basic Map Task Flow Properties

3. To hide the header on the map, click the Display Options tab and deselect the Display Header check box.

4. Click OK to save your changes.

   The map displays the location corresponding to the currently selected name in the table.

5. Click Save and Close to exit edit mode.

   The task flow displays as shown in Figure C–30.
6. Optionally, you can change the layout of the task flow so that the table displays to the left of the map. To refine the layout of the master task flow:

   a. Edit the source of the master task flow, Address on Google Maps, and on the Fragment tab, replace the following lines:

      ```xml
      <af:panelGroupLayout id="pgl1">
      <cust:panelCustomizable id="pc1">
      </af:panelGroupLayout>
      <cust:panelCustomizable id="pc1">
      </cust:panelCustomizable>
      </showDetailFrame>
      </cust:panelCustomizable>
      <showDetailFrame>
      with

      ```xml
      <af:panelGroupLayout id="pgl1" layout="horizontal" valign="top">
      <cust:panelCustomizable id="pc1" layout="vertical" valign="top">
      </cust:panelCustomizable>
      </showDetailFrame>
      </cust:panelCustomizable>
      <showDetailFrame>
      
   b. Move the closing </cust:panelCustomizable> tag so that it is between the two showDetailFrame tags, as follows:

      ```xml
      </showDetailFrame>
      </cust:panelCustomizable>
      <showDetailFrame>
      
   c. To disable default selection in the table, remove the selectedRowKeys attribute on the <table> tag.

   d. To ensure that the map stretches when required, change the columnStretching attribute to last.
7. To test the master-detail task flow further, create a page and add the Address on Google Maps task flow to it.

Edit the task flow on the page and set the Stretch Content option to auto.

**Note:** To ensure that the page reflects your recent changes, you may need to directly use the URL to open the page afresh, rather than clicking the Refresh button.

The task flow displays as shown in Figure C–31.

**Figure C–31  Page Displaying Master-Detail Task Flow**

Select a row in the table. The map displays the location corresponding to the city and state in the selected row.