

Oracle® Fusion Middleware

Using Oracle WebCenter Portal

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Documentation for knowledge workers that describes how to explore and interact with WebCenter Portal.

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Preface

This guide describes how to interact with information and users through WebCenter Portal. It provides instructions for tasks such as working in a personal environment in the Home portal; working in a portal as a portal member; finding and updating content; creating new content; collaborating with other business users to create, edit, and share documents; and sending and receiving instant messages with peers.

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 from the views depicted in screenshots.

Audience

This document is intended for knowledge workers who consume or update information presented by Oracle WebCenter Portal. For a complete description of this role, 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:

- *Building Portals with 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:

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

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 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.
 - Oracle Public Cloud: provisioning and running WebCenter Portal on Oracle Java Cloud Service (JCS).
- 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 upgrading a pre-11.1.1.8.0 portal to the current release. See the "Upgrading a Pre-11.1.1.8.0 Portal" section in *Building Portals with Oracle WebCenter 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:

- Support for 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:

Asset Type	File Names
Page Templates	pageTemplate_Skyros_Side_Navigation_Stretch_v2.ear
	pageTemplate_Skyros_Side_Navigation_v2.ear
	pageTemplate_Skyros_Top_Navigation_Stretch_v2.ear
	pageTemplate_Skyros_Top_Navigation_v2.ear
Skins	skin_Skyros_v2_Skin.ear
Task Flows	taskFlow_Portal_Side_Navigation.ear
	taskFlow_Portal_Top_Navigation.ear

Perform the following steps to use the new page templates:

1. 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*.
2. To change the page template used by an individual portal, see the "Changing the Page Template for a Portal" section in *Building Portals with Oracle WebCenter Portal*.
3. To change the preferred skin used by a page template, see the "Setting the Preferred Skin for a Page Template" section in *Building Portals with Oracle WebCenter Portal*.

For more information, see the "Working with Page Templates" chapter in *Building Portals with Oracle WebCenter Portal* 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)

WebCenter Portal 11g Release 1 (11.1.1.8.0) included the following new and changed features:

- Terminology changes:

Prior Releases	11g Release 1 (11.1.1.8.0)
WebCenter Portal: Spaces	WebCenter Portal
space	portal
space template	portal template
resource	asset

- End-User Experience
 - Updated profile user interface that includes improved organization of profile information, click to edit, and clear profile photo functionality. See [Chapter 6, "Managing Your Profile."](#) 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 [Chapter 3, "Searching for Information."](#)
- Portal Builder

- Simplified portal creation that includes in-place page creation. See the "Creating and Building a New Portal" chapter in *Building Portals with Oracle WebCenter Portal*.
- Redesigned portal edit and administration user interface (Portal Builder) that consolidates tasks into fewer steps. See the "Editing a Portal" and "Administering a Portal" chapters in *Building Portals with Oracle WebCenter 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 the "Working with Portal Pages" part in *Building Portals with Oracle WebCenter Portal*.
- Automatic update of portal navigation as new pages are created. See the "Creating a Page or Subpage in an Existing Portal" section in *Building Portals with Oracle WebCenter 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 the "About Creating a New Portal" section in *Building Portals with Oracle WebCenter Portal*.
- Hierarchical page support (subpages). See the "Creating Pages or Subpages in a Portal" section in *Building Portals with Oracle WebCenter 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 the "Adding Activity Graphs and Recommendations to a Portal," "Adding Connections to a Portal," and "Adding Profiles to a Portal" chapters in *Building Portals with Oracle WebCenter 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 the "Administering Device Settings in a Portal" section, the "Managing Device Groups for a Portal" chapter, and the "Creating a Page Variant for a Device Group" section in *Building Portals with Oracle WebCenter Portal*. Additional documentation for mobile 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 the "Using Responsive Templates" section in *Building Portals with Oracle WebCenter Portal*. Additional documentation for mobile 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*.
- Restructured documentation library according to personas and their roles in WebCenter Portal:
 - *Using Oracle WebCenter Portal* (this guide) 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.
 - *Building Portals with Oracle WebCenter Portal* 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).
 - *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 *Knowledge Worker* persona.

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*.

Part I

Getting Started

Part I contains the following chapters:

- [Chapter 1, "Introduction to WebCenter Portal"](#)
- [Chapter 2, "Exploring WebCenter Portal"](#)
- [Chapter 3, "Searching for Information"](#)
- [Chapter 4, "Managing Your Favorites"](#)
- [Chapter 5, "Setting Your Personal Preferences"](#)
- [Chapter 6, "Managing Your Profile"](#)
- [Chapter 7, "Using WebCenter Portal Impersonation"](#)

Introduction to WebCenter Portal

This chapter describes WebCenter Portal, defines useful terms, and provides an overview of this guide.

This chapter includes the following topics:

- [Section 1.1, "About This Guide"](#)
- [Section 1.2, "WebCenter Portal Concepts"](#)
- [Section 1.3, "Basic WebCenter Portal Tasks"](#)

1.1 About This Guide

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

WebCenter Portal provides the tools to quickly and easily create portals, build communities, and participate in social networking. It enables users to share and consume information and interact with other users effectively and efficiently.

1.2 WebCenter Portal Concepts

This section contains the following topics:

- [Section 1.2.1, "What Is a Portal?"](#)
- [Section 1.2.2, "What Is the Home Portal?"](#)
- [Section 1.2.3, "What Are Pages?"](#)
- [Section 1.2.4, "What Are Portal Components?"](#)
- [Section 1.2.5, "What Are Portal Tools and Services?"](#)

1.2.1 What Is a Portal?

A *portal* is an online gateway to a wide variety of tools, services, and applications. A portal can provide networking tools within an organization, easing the way towards building connections, posting content, and sharing files across teams. It can provide external users with a clear pathway to company services and information. It can provide support networks for small and large internal teams as well as thousands of partners, suppliers, and customers.

A portal presents information and resources that are diverse in location, technology, and derivation, through a single point of entry. Content and technology that originate

from widespread sources appear as a cohesive set of information and services that are easily available from one location.

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

Portals also deliver personalization capabilities. With personalization, you can leverage the information in a user's Profile to tailor his or her experience of the portal. For example, Mary the manager logs in and sees reports on department-wide results and links to reporting applications, while Sal the salesman logs in and sees reports on his own results and links to leads.

1.2.2 What Is the Home Portal?

The Home portal is your portal landing page. It's where you have access to your profile, preferences, and all the portals that are available to you, and where you can customize certain elements of your own view. You can create your own *personal pages* in the Home portal, and system administrators can expose *system pages* and *business role pages* to selected audiences.

For more information, see [Chapter 2, "Exploring WebCenter Portal."](#)

1.2.3 What Are Pages?

WebCenter Portal offers several types of *pages*. These may be out-of-the-box or user-created.

Out-of-the-Box Pages

- *System pages*, such as the **Login** page and the **Documents** page, are prepopulated with relevant input fields and boilerplate text. System pages are managed by portal moderators and system administrators.
- *Business role pages* are populated with information of relevance to a particular business role, such as salesperson, accountant, or marketing associate, and pushed into the Home portals of anyone who is assigned that role. Business role pages are managed by the system administrator.

User-Created Pages

You and other WebCenter Portal users can create new pages to meet your needs:

- *Personal pages* are pages 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 you (the person who created them), but you can also allow others to see your personal pages. For more information, see [Chapter 9, "Creating and Managing Personal Pages."](#)

While you are primarily responsible for managing the content of your personal pages, a system administrator has the authority to administer all personal pages in WebCenter Portal administration.

- *Portal pages* are pages that can be created by anyone with permissions to create pages in a portal. Portal pages may serve different purposes:
 - Portal pages may be created by the portal moderator, designed to contribute to the knowledge base of the portal, and made available to all members of the portal.

- Portal pages may be created by a portal member and exposed in the portal either for personal use or for the use of other selected portal members. While this type of portal page may not be exposed to all portal members, a portal moderator nonetheless has the authority to administer them along with all other portal pages.

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.

You can customize your own view of a page by rearranging items, expanding or collapsing content viewers, and resizing areas, visible only to you.

1.2.4 What Are Portal Components?

As you use WebCenter Portal to build a portal, you will work with elements on the portal pages. These elements are many and varied, and are collectively referred to as *portal components*. Portal components include views/viewers, portlets, content containers, and other types of resources such as images and links.

1.2.5 What Are Portal Tools and Services?

Portal tools and services are provided by WebCenter Portal and available once WebCenter Portal is installed and configured and your system administrator has set up valid connections to the required external back-end servers, tools, and services. They provide such features as activity streaming, connections, scheduling, lists, notifications, and the like.

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

1.3 Basic WebCenter Portal Tasks

This section provides an overview of the tasks involved in using WebCenter Portal. These tasks are described step-by-step in the chapters of this guide:

- [Section 1.3.1, "Getting Started"](#)
- [Section 1.3.3, "Connecting and Collaborating with Other Users"](#)
- [Section 1.3.4, "Working with Documents"](#)
- [Section 1.3.5, "Staying Informed"](#)
- [Section 1.3.6, "Staying Organized"](#)

1.3.1 Getting Started

For more information, see [Part I, "Getting Started,"](#) which includes the following chapters:

- [Chapter 2, "Exploring WebCenter Portal"](#)
- [Chapter 3, "Searching for Information"](#)
- [Chapter 4, "Managing Your Favorites"](#)
- [Chapter 5, "Setting Your Personal Preferences"](#)
- [Chapter 6, "Managing Your Profile"](#)

- [Chapter 7, "Using WebCenter Portal Impersonation"](#)

1.3.2 Working with Portals and Pages

For more information, see [Part II, "Working with Portals and Pages,"](#) which includes the following chapters:

- [Chapter 8, "Working In the Home Portal"](#)
- [Chapter 9, "Creating and Managing Personal Pages"](#)
- [Chapter 10, "Exploring Portals"](#)

1.3.3 Connecting and Collaborating with Other Users

For more information, see [Part III, "Connecting and Collaborating with Other Users,"](#) which includes the following chapters:

- [Chapter 11, "Managing Your Contacts"](#)
- [Chapter 12, "Using Instant Messaging and Presence Viewer"](#)
- [Chapter 13, "Sending and Viewing Mail"](#)
- [Chapter 14, "Working with Feedback and the Message Board"](#)
- [Chapter 15, "Liking, Commenting On, and Sharing Items in WebCenter Portal"](#)
- [Chapter 16, "Viewing and Participating in Discussions"](#)
- [Chapter 17, "Working with Wikis"](#)
- [Chapter 18, "Working with Blogs"](#)

1.3.4 Working with Documents

For more information, see [Part IV, "Working with Documents,"](#) which includes the following chapters:

- [Chapter 19, "Creating and Managing Documents"](#)
- [Chapter 20, "Collaborating on Documents"](#)
- [Chapter 21, "Working with Microsoft Office and Explorer Integration"](#)

1.3.5 Staying Informed

For more information, see [Part V, "Staying Informed,"](#) which includes the following chapters:

- [Chapter 22, "Getting Notified When Things Change"](#)
- [Chapter 23, "Exploring Recommendations and Content"](#)
- [Chapter 24, "Tracking Portal Activities"](#)
- [Chapter 25, "Working with Announcements"](#)
- [Chapter 26, "Working with Polls"](#)
- [Chapter 27, "Monitoring RSS Feeds"](#)
- [Chapter 28, "Exploring Your Worklists"](#)

1.3.6 Staying Organized

For more information, see [Part VI, "Staying Organized,"](#) which includes the following chapters:

- [Chapter 29, "Working with Calendars and Events"](#)
- [Chapter 30, "Managing Your Notes"](#)
- [Chapter 31, "Working with Lists"](#)
- [Chapter 32, "Linking Information in WebCenter Portal"](#)
- [Chapter 33, "Working with Tags"](#)

Exploring WebCenter Portal

This chapter describes how to get started in WebCenter Portal. It provides information about registering yourself (if necessary) and links to more detailed sections that cover, working in the Home portal, searching, saving favorites, and setting preferences. There is also a brief section about how to access help.

This chapter includes the following topics:

- [Section 2.1, "Registering Yourself with WebCenter Portal"](#)
- [Section 2.2, "Working In the Home Portal"](#)
- [Section 2.3, "Searching WebCenter Portal"](#)
- [Section 2.4, "Saving Favorite Web Pages"](#)
- [Section 2.5, "Setting Preferences"](#)
- [Section 2.6, "Working with Your Profile"](#)
- [Section 2.7, "Accessing WebCenter Portal Online Help"](#)

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

Notes:

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

2.1 Registering Yourself with WebCenter Portal

Your system administrator may enable self-registration with WebCenter Portal. This allows you to create your own login credentials and enter the WebCenter Portal as an authenticated user. The privileges of authentication are many: your own view of the

Home portal, access to other features based on your assigned user role, a broader range of available interactive features, to name a few.

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

To register yourself as a WebCenter Portal user:

1. Open WebCenter Portal.

For example:

`http://host:port/webcenter`

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

2. On the login screen, click the **Register** link (Figure 2-1).

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

Figure 2-1 The Register Link on the Welcome Page



3. On the resulting **Self-Registration** page (Figure 2-2), enter your user information: Fields marked with an asterisk require a value.

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

Figure 2–2 WebCenter Portal Self-Registration Page

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

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

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

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

If the name you entered is in use, provide another user name and test that. Continue this cycle until the check assures you that your entry is unique.

- c. Provide a password in the **Choose Password** field.
- d. Reenter the password in the **Re-enter Password** field.
- e. Enter your first name in the **First Name** field.
- f. Enter your last name (that is, your surname) in the **Last Name** field.
- g. Enter your company email address in the **Email Address** field.

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

4. Click the **Register** button.

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

Note: By default, if a user name with the same mail ID exists, when you click **Register**, a dialog opens informing you that the mail ID exists. The dialog includes a button for sending a message to the mail ID associated with the existing user name.

Because you are not yet authenticated, your message is sent to a public mail box, provided your system administrator has configured public mail credentials.

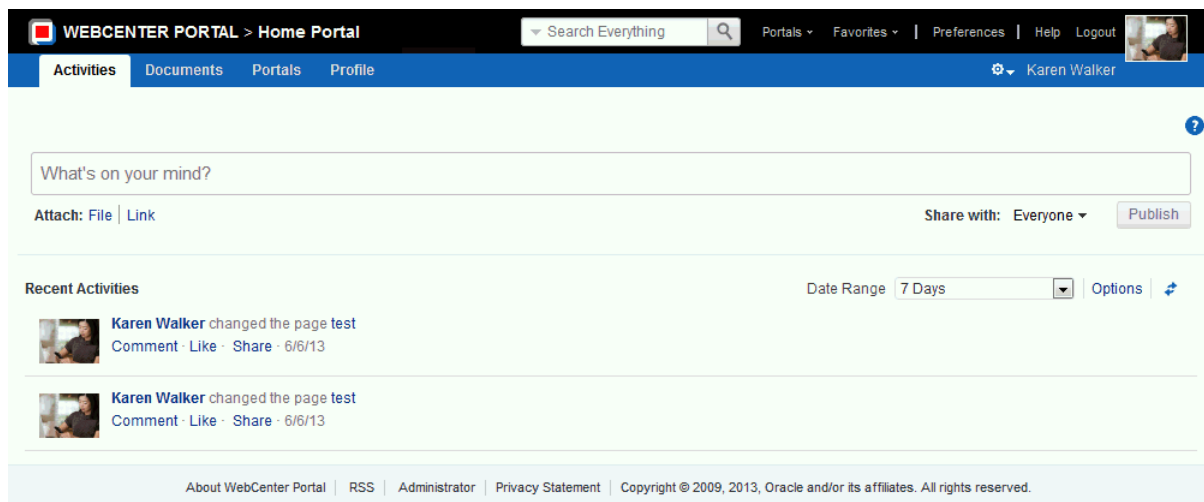
Note that this default behavior may be overridden by customizations provided by your portal developers.

2.2 Working In the Home Portal

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

For more information, see [Chapter 8, "Working In the Home Portal."](#)

Figure 2-3 *The Home Portal*



2.3 Searching WebCenter Portal

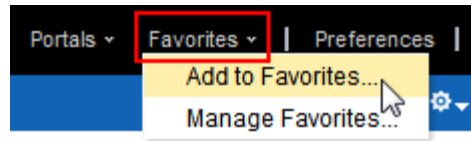
WebCenter Portal provides global (application-wide) search (Figure 2-4). For information, see [Chapter 3, "Searching for Information."](#)

Figure 2-4 *Search Box*



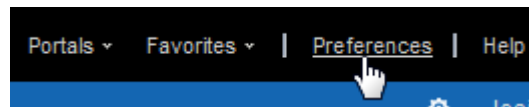
2.4 Saving Favorite Web Pages

Use Favorites (Figure 2-5) to keep your own personal list of favorite web sites and pages to access from any browser you choose. For information, see [Chapter 4, "Managing Your Favorites."](#)

Figure 2-5 Favorites Menu

2.5 Setting Preferences

Your personal preferences, accessed through the Preferences link (Figure 2-6), provide easy configuration settings for tailoring the application to your particular working style. These include settings for your preferred application display language; your preferred application look and feel; your WebCenter Portal password; and the like. Additionally, WebCenter Portal preferences provide an accessibility setting to optimize the application user interface for use with a screen reader, such as JAWS. For information, see [Chapter 5, "Setting Your Personal Preferences."](#)

Figure 2-6 Preferences Link

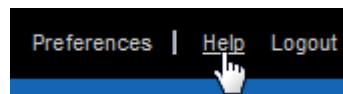
2.6 Working with Your Profile

Your profile is a collection of useful data about you. It can include contact information, a photo, your location within the company hierarchy, and so on. The social networking capabilities in WebCenter Portal enable you to view and manage your own profile and to view the profiles of others if they have made them available to you. For information about how to view and manage your profile, see [Chapter 6, "Managing Your Profile."](#)

2.7 Accessing WebCenter Portal Online Help

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

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

Figure 2-7 Help Link

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

Searching for Information

This chapter describes how to use the search features in WebCenter Portal.

This chapter includes the following topics:

- [Section 3.1, "About Searching in WebCenter Portal"](#)
- [Section 3.2, "Searching with Oracle SES 11.2.2.2"](#)
- [Section 3.3, "Searching with Oracle SES 11.1.2.*"](#)
- [Section 3.4, "Limitations with Search"](#)

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

3.1 About Searching in WebCenter Portal

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

In addition to WebCenter Portal's search, the Documents tool provides its own search engine for file searches. This saves time and increases the relevancy of results by narrowing the scope of a search to files. The Documents tool searches within a specific portal's document library. For more information, see [Section 19.26, "Searching for Documents."](#)

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

Global search does not search portal assets, such as portal templates, page templates, resource catalogs, and navigation models. If you need to search portal assets (as opposed to user-specific data, such as documents and portals), use the **Filter** field on their respective application pages.

3.1.1 Running Various Search Environments

WebCenter Portal provides two ways of searching:

- Oracle Secure Enterprise Search (SES) adapter
- Oracle WebCenter Portal live (delegated) search

For best performance and scalability, most system administrators configure large-scale implementations to use Oracle SES.

Oracle SES provides unified ranking results for the following assets:

- Documents, including wikis and blogs
- Announcements and discussions
- Portals, lists, page metadata, and people

For example, when you run a search for a user name, most likely, you are looking for that person's contact information (that is, the exact user name in your organization), not necessarily documents that the user wrote. The unified ranking in Oracle SES enables you to see the most relevant results.

Additionally, with Oracle SES as the search engine, you can use the wildcard character [*] in the middle or end of a term for wildcard matching. For example, when you search for keywords like `wiki` or `page`, Oracle SES does not return the wiki page `MyWikiPage` in search results. However, `My*` or `My*Page` does return `MyWikiPage`.

3.2 Searching with Oracle SES 11.2.2.2

This section describes your search experience if your application has been configured with Oracle SES 11.2.2.2.

Notes: Your search environment varies depending on how your system administrator configured search. For example:

- **Oracle SES 11.2.2.2** supports faceted search, filtered search in the search box, and document thumbnails, while earlier releases of Oracle SES and implementations with live (delegated) search do not. See [Section 3.2, "Searching with Oracle SES 11.2.2.2."](#)
- **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. See [Section 3.3, "Searching with Oracle SES 11.1.2.*."](#)

Your system administrator can tell you which search environment you have running. The way you access search depends on how the portal is designed. The application specialist might also provide you with a pretty URL to access the page.

This section contains the following topics:

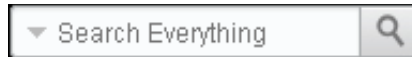
- [Section 3.2.1, "Running a Global Search"](#)
- [Section 3.2.2, "Running Faceted Searches to Narrow Results"](#)
- [Section 3.2.3, "Running Filtered Searches to Narrow Results"](#)
- [Section 3.2.4, "Running Sorted Searches to Narrow Results"](#)

3.2.1 Running a Global Search

To perform a global search:

1. Locate the global search field, and enter a search term. For example, [Figure 3-1](#) shows the search field at the top right of WebCenter Portal.

Figure 3-1 Search Field



2. Press **Enter** or click the **Search** icon ([Figure 3-2](#)) next to the global search field.

Figure 3-2 Search Icon



Results display in the search results page. [Figure 3-3](#) is a result list showing all (Everything) results.

Figure 3-3 Search Results

The screenshot shows the Oracle WebCenter Portal search results page. At the top, there is a navigation bar with the text "DOCUMENTEXCHANGEOFMONTYCOI" and a search bar containing the term "boston". Below the navigation bar, there are tabs for "Home" and "Documents". The main content area displays 6 search results for "boston", sorted by Relevance. The results include:

- Boston Pops mcneedle**: DCR Hatch Memorial Shell **Boston**, MA July 3: 7:30 concert ... WBZ-TV) At 7:30 p.m., **Boston Pops** Concert begins. Created by *monty_coi* Updated by *monty_coi* Last modified on 7/2/13 11:21 AM. Tagged with *boston events*. Preview - Download - 2 KB.
- Food in Boston mcneedle**: MCDiscussionSitePortal. Last modified on 3/20/13 4:58 PM. Forum.
- Food in Boston mcneedle**: Dot8MCDiscussionSitePortal. Last modified on 3/20/13 5:46 PM. Forum.
- BPFS Program 2012 mcneedle.pdf**: **Boston PoPs Fireworks spectacular Boston PoPs Fireworks sp...** Sponsoring freedom and the **Boston Pops** Fireworks Spectacular. Created by *monty_coi* Updated by *monty_coi* Last modified on 7/2/13 11:48 AM. Tagged with *boston events*. Preview - Download - 5.3 MB.
- Fourth of July 2013 mcneedle**: The 40th annual **Boston Pops** Fireworks Spectacular ... to begin at 9:30 p.m. The **Boston Pops** concert will be held at the Hatch Shell. Created by *monty_coi* Updated by *monty_coi* Last modified on 7/2/13 11:19 AM. Tagged with *boston events*. Preview - Download - 5 KB.
- Map1 mcneedle.pdf**: MEMORIAL DRIVE MEMORIAL DRIVE LONGFELLOW BRIDGE BEACON STREET BEACON STREET COMMONWEALTH AVENUE COMMONWEALTH AVENUE BOYLSTON STREET ST JAMES AVENUE PARK PLAZA STUART STREET VASSAR STREET ALBANY STREET BEACON STREET MAIN STREET. Created by *monty_coi* Updated by *monty_coi* Last modified on 7/2/13 11:48 AM. Tagged with *boston events*. Preview - Download - 2.2 MB.

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

3. Click a link to open a result.

You can click the **Preview** button, as highlighted in [Figure 3-4](#), to see a preview of the result before opening it.

Figure 3-4 Search Preview

Boston's parks and other green spaces **mcneedle**



THE GRASS IS ALWAYS GREENER Boston may be a concrete jungle, but there are green spaces to be found if you just know where to look.

Created by *monty_coi* Last modified on 4/9/13 2:02 PM

Preview Topic - 1 Reply

[Figure 3-5](#) shows an example of a result preview.

Figure 3-5 Search Results Preview

The screenshot shows a search results preview window titled "1 search result for 'customer'". The main content is a table titled "PS4 Resourcing by Component / Feature areas". The table has columns for Product Area, Sub Area, QA Test Owner, Dev VP, # Resources Needed, Resources Allocated, and Named Resources. The table lists various product areas such as ACTVORSHIP, SCOUTS/TEAM, ANALYTICS, etc., and their corresponding resource needs and allocations.

Product Area	Sub Area	QA Test Owner	Dev VP	# Resources Needed	Resources Allocated	Named Resources
ACTVORSHIP	John	Robert	John	0.5	0.5	John (0.5)
SCOUTS/TEAM	John	Robert	Manish	0.5	0.5	Manish (0.5), John (0.5)
ANALYTICS	John	Robert	Stacy	2	2	Stacy (2)
SR	John	Robert	John	0.5	0.5	John (0.5)
SCAL	John	Robert	John	0.5	0.5	John (0.5)
SMALL	John	Robert	John	0.5	0.5	John (0.5)
COMMUNITY	John	Robert	John	0.5	0.5	John (0.5)
INCENTIVE	John	Robert	John	1.5	1.5	John (1.5)
FORUMS	John	Robert	John	0.5	0.5	John (0.5)
SR	John	Robert	John	0.5	0.5	John (0.5)
NOTES	John	Robert	Manish	0.5	0.5	Manish (0.5)
NOTIFICATION	John	Robert	Manish	0.5	0.5	Manish (0.5)
CRM	John	Robert	John	0.5	0.5	John (0.5)
PERSONALIZATION	John	Robert	John	0.5	0.5	John (0.5)
SR	John	Robert	John	0.5	0.5	John (0.5)
PERSONALIZATION	John	Robert	John	0.5	0.5	John (0.5)
SR	John	Robert	John	0.5	0.5	John (0.5)
RELATIONS	John	Robert	Manish	0.5	0.5	Manish (0.5)
SR	John	Robert	Manish	0.5	0.5	Manish (0.5)
SEARCH	John	Robert	John	0.5	0.5	John (0.5)
SR	John	Robert	John	0.5	0.5	John (0.5)
SURVEYS	John	Robert	John	0.5	0.5	John (0.5)
TRAINING	John	Robert	John	0.5	0.5	John (0.5)

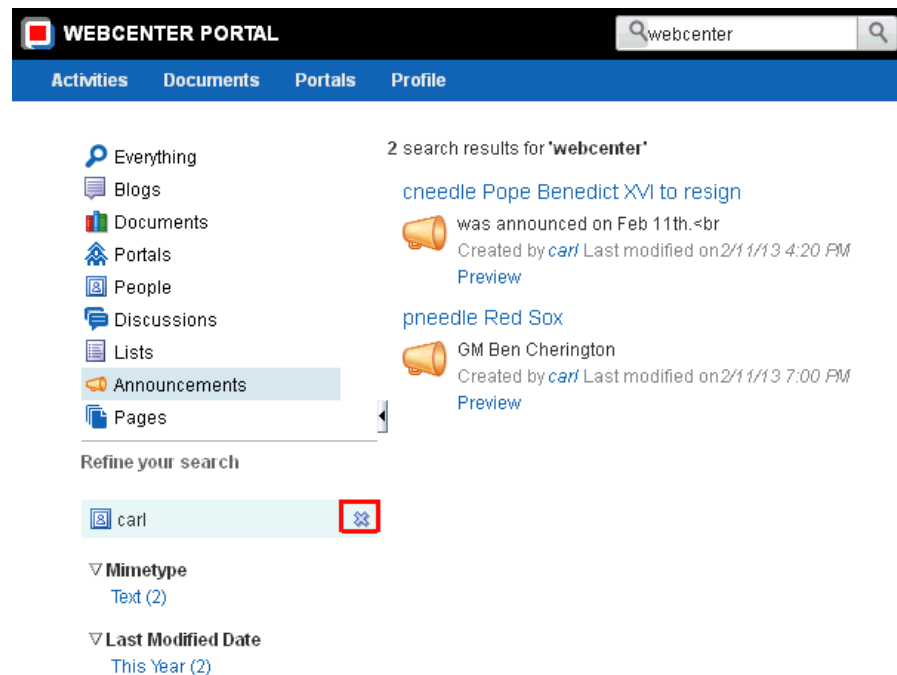
3.2.2 Running Faceted Searches to Narrow Results

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

Note: Oracle SES 11.2.2.2 supports *facets*. Earlier releases of Oracle SES supported *refiners*. Facets and refiners are similar in that you use them to narrow down search results. A system configured with Oracle SES 11.2.2.2 (using facets) looks similar to a system configured with Oracle SES 11.1.2.* (using refiners). However, facets count the full corpus and have better response time than refiners.

For example, [Figure 3–6](#) shows a search filtered to show only announcements created by the **weblogic** user. You can add more facets, for example clicking **This Year** under the **Last Modified Date** facet, to continue narrowing this search.

Figure 3–6 Faceted Result List



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

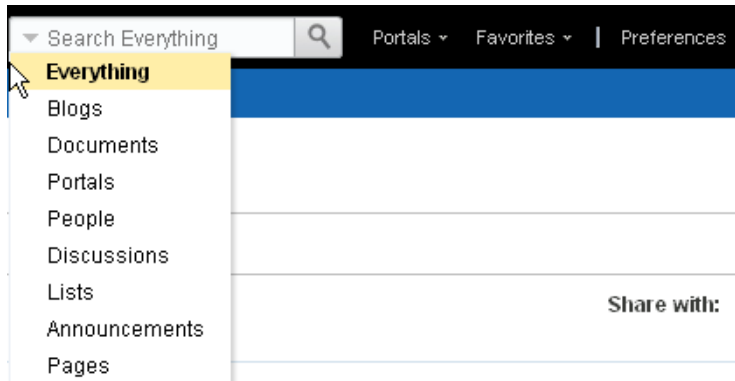
- Author
- Last Modified Date
- Mimetype
- Tags
- Portal

Click the **Remove Filter** icon (highlighted in [Figure 3–6](#)) to remove each facet and return to a complete result list.

3.2.3 Running Filtered Searches to Narrow Results

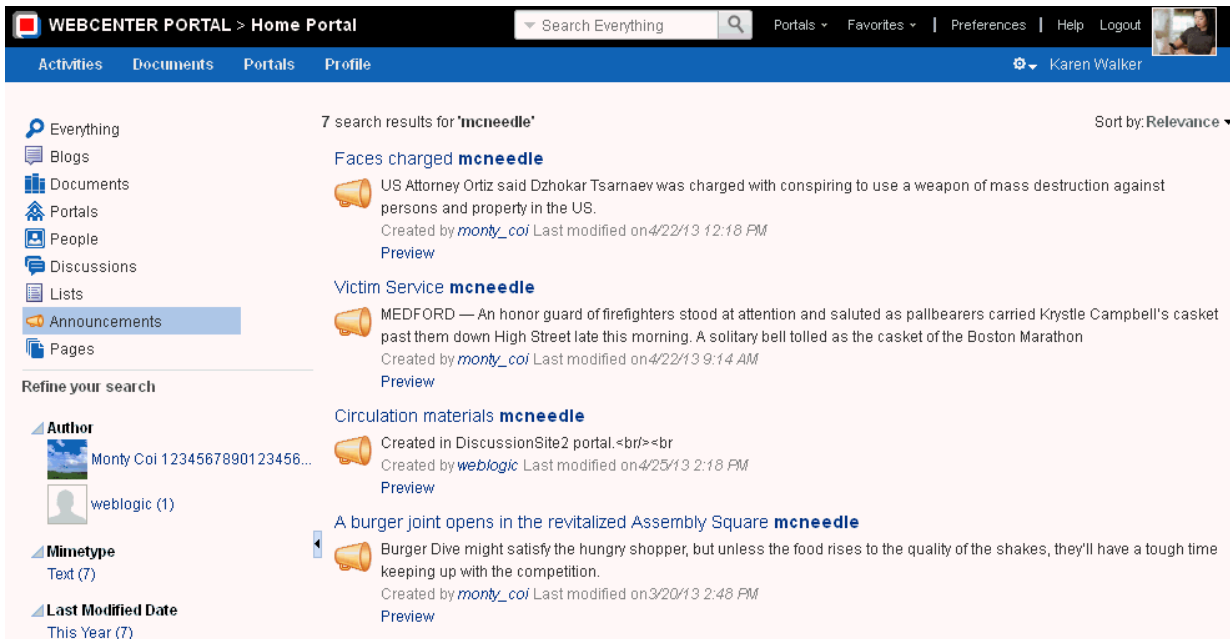
You can narrow your results using the filter list in the global search box ([Figure 3–7](#)).

Figure 3–7 Filtered Search



Or, you can filter results the same way using the facets on the left side of search results. For example, [Figure 3–8](#) shows only announcements in the result list.

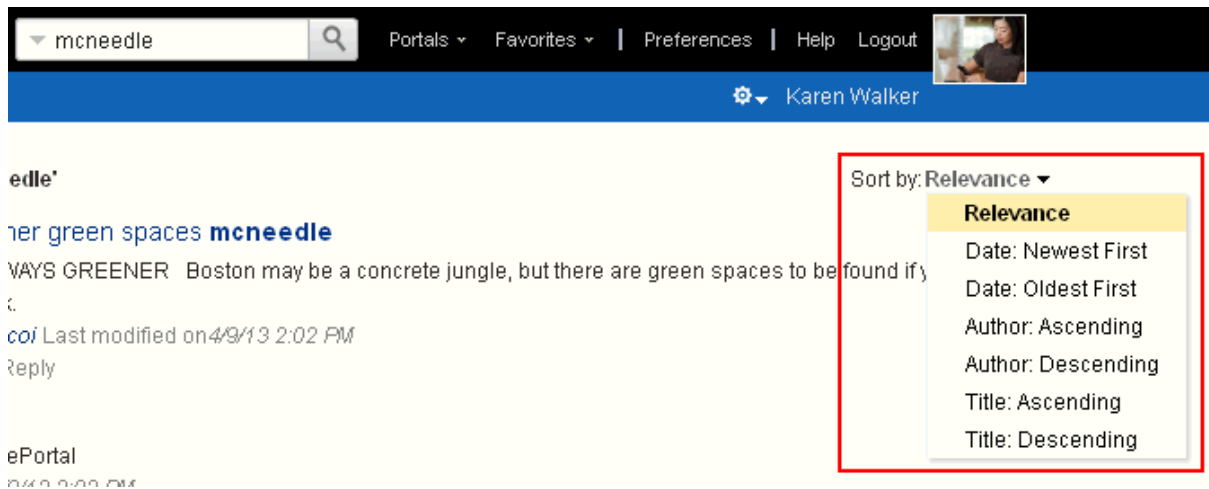
Figure 3–8 Search Results Filtered to Show Only Announcements



3.2.4 Running Sorted Searches to Narrow Results

You can narrow your results using the **Sort by** drop-down list to the right of page ([Figure 3–9](#)).

Figure 3–9 Sorting in Search



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

- Date: Newest First
- Date: Oldest First
- Author: Ascending
- Author: Descending
- Title: Ascending
- Title: Descending

3.3 Searching with Oracle SES 11.1.2.*

This section describes your search experience if WebCenter Portal has been configured with Oracle SES 11.1.2.*.

Notes: Your search environment varies depending on how your system administrator configured search. For example:

- **Oracle SES 11.2.2.2** supports faceted search, filtered search in the search box, and document thumbnails, while earlier releases of Oracle SES and implementations with live (delegated) search do not. See [Section 3.2, "Searching with Oracle SES 11.2.2.2."](#)
- **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. See [Section 3.3, "Searching with Oracle SES 11.1.2.*."](#)

Your system administrator can tell you which search environment you have running.

If your organization customized the search user interface, your screen shots may look different.

This section contains the following topics:

- [Section 3.3.1, "Running a Global Search"](#)
- [Section 3.3.2, "Using Refiners to Narrow Search Results"](#)
- [Section 3.3.3, "Saving Searches"](#)
- [Section 3.3.4, "Setting Individual Preferences for Search Results"](#)

3.3.1 Running a Global Search

To perform a global search:

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

For example, [Figure 3–10](#) shows the search field at the top right of WebCenter Portal.

Figure 3–10 Global Search Field



2. Press **Enter** or click the **Search** icon next to the global search field ([Figure 3–11](#)).

Figure 3–11 Search Icon



Results display in the search results page ([Figure 3–12](#)).

Figure 3–12 Global Search Results

3. Click a link to open a result.

When Oracle SES 11.1.2.* is configured, users can individually configure how their search results are displayed. Specifically, each user can control which tools and services are included in their search and the order in which they are listed in the results. Set this in the Preferences dialog (for information see [Section 3.3.4, "Setting Individual Preferences for Search Results"](#)).

3.3.2 Using Refiners to Narrow Search Results

You can narrow your results in the Refine Search section to produce a smaller set of results. For example, to see all documents that one particular person posted, rather than scrolling through pages of results to find them, you can simply click that person's name or profile picture, and the results are filtered to show only results from that person.

- With the Oracle SES 11.1.2.2 adapter, you can narrow the search by Author (uploader/modifier), Last Modified date, Content Type, Portal, and Tags.
- With WebCenter Portal's live search adapters, you can narrow the search only by Author (uploader/last modifier) or Last Modified date.

Notes: Oracle SES results for Author include *all* user names that have modified a document/wiki/blog, while live results for Author include only the name of the person who *last* modified a document/wiki/blog.

Some WebCenter Portal components, like tagged items and favorites, do not supply refiners for search, and do not appear in refined searches.

To refine the display of search results:

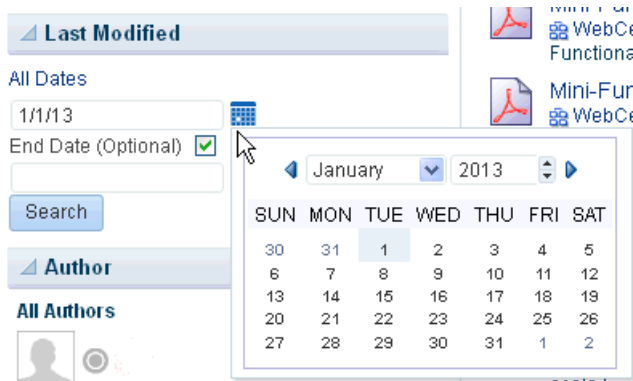
1. Perform a global search as described in [Section 3.3.1, "Running a Global Search."](#)
The search results display on the search results page.
2. To refine the display of search results by date, choose a time-range limitation from the Last Modified box.

For example, click **Since Yesterday** to view results posted since the previous day, or click **Past 7 Days** to view results posted in the past week. The number next to each time range indicates the search's best guess at how many search results fall within the specified range.

Some date selections, such as years or months, provide additional refinement options when you choose them. For example, when you refine a search by all results occurring within 2007, your refined results display and additional refinements appear in the Last Modified box.

Click **Custom Date Range** and enter a date in the field provided (optionally, with an end date also), or click the **Select Date** icon and choose a date from a date picker ([Figure 3-13](#)).

Figure 3–13 Date Picker for Custom Date Range



3. To refine the display of search results to a person who authored/uploaded/modified it, choose someone listed under Author (Figure 3–14).

Figure 3–14 Authors on the Search Results Page



For example, click **pat** to view all results contributed by the user Pat.

The number next to each user name indicates the search's best guess at how many search results are associated with the specified user.

Click **More...** or **Less...** to see more or less authors listed in the Author area.

4. When a refinement is selected, it appears above the Results list with a **Delete** icon, enabling you to remove the refinements you have applied to search results (Figure 3–15).

Figure 3–15 Delete Icon to Remove Refinement of Search Results

Keywords: webcenter | Author: pat ✕

Click the **Delete** icon to remove that particular search results refinement and broaden the list of displayed results.

3.3.3 Saving Searches

After you have performed a search, you can save it so that you can run it again later without having to reenter the search terms. You can also share the saved search with portals.

Note: You can save searches only if you are logged in to an application connected to Oracle SES 11.1.2.* (not Oracle SES 11.2.2.2).

This section includes the following topics:

- [Section 3.3.3.1, "Saving a Search"](#)
- [Section 3.3.3.2, "Running a Saved Search"](#)
- [Section 3.3.3.3, "Sharing a Saved Search"](#)
- [Section 3.3.3.4, "Customizing a Saved Search"](#)
- [Section 3.3.3.5, "Deleting a Saved Search"](#)

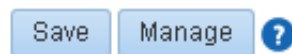
3.3.3.1 Saving a Search

Saved searches are useful for the searches you run frequently. They assist in keeping you current as new information is added to the search pool.

To save a search:

1. Perform a global search as described in [Section 3.3.1, "Running a Global Search."](#)
The search results display on the Search results page.
2. Click **Save** below the search field ([Figure 3–16](#)).

Figure 3–16 Save and Manage Buttons



The Create Saved Search dialog opens ([Figure 3–17](#)).

Figure 3–17 The Create Saved Search Dialog

3. In the **Name** field, enter a meaningful name for the search.

The value you enter in the **Name** field is the value that appears on the dropdown list of saved searches.

The search that was in the **Search** field is saved, no matter what name you give it. For example, if the search term was *admin*, but you enter *jcr* in the **Name** field. The saved search searches for the term *admin* and not *jcr*.

4. Optionally, in the **Description** field, enter a description of the search.

5. Select the **Share in portal** check box to enable other members of the portal to see this search on the portal's dropdown list of saved searches. Only one portal can be specified.
6. Click the **Select Portal** icon to select the portal in which to share the saved search.
7. Click **OK** to save the search.

3.3.3.2 Running a Saved Search

You can save searches for a quick and easy way to do repeat searches. The saved searches to which you have access depends on the location.

- Go to the Home portal (see [Section 8.2, "Accessing the Home Portal"](#)). After you have saved searches, there is a dropdown list for Saved Searches in the Home portal.
- Go to any page containing the All Saved Searches component ([Figure 3–18](#)).
In a portal, All Saved Searches lists all your saved searches for the portal and all shared saved searches for the portal (made both by yourself and other users). It does not list your global saved searches or saved searches made against other portals.

In the Home portal, All Saved Searches lists all your global saved searches.

Figure 3–18 All Saved Searches



- Go to any page where the saved search was placed.
The Saved Search list shows the results of the particular search.
- To run a saved search:
1. Log in and find the saved search:
 - Locate the page containing the All Saved Searches component.
 - Locate the page containing the saved search. In this case, the search results are immediately visible.
 2. From the All Saved Searches component or the Saved Search panel in the Home portal, click the link for the saved search you want to run.

Tip: The description is rendered as a tooltip when you move your cursor over the name of the saved search.

3. View the results on the dynamically-generated Search Results page.

3.3.3.3 Sharing a Saved Search

You can share a saved search if you think the results of a search might be useful for other portal members.

To share a saved search:

1. Go to the portal where the search was performed and saved.
2. Click **Manage** (Figure 3–19).

Figure 3–19 Save and Manage Buttons



3. The **Manage Saved Searches** window opens. In the Saved Searches drop-down list, select the saved search you want to share.
4. Select the **Share in portal** check box, and click the **Select portal** icon to select the portals in which you want to share this saved search.

The saved search is now available for other members of the portal to run. The search is listed in the Saved Searches list for all portal members and in the All Saved Searches list, if one exists.

5. Click **Apply**, then **OK**.

3.3.3.4 Customizing a Saved Search

After you have added a saved search to a page, you can customize it.

Click the **Personalize** icon (Figure 3–20) to make changes to the saved search.

Figure 3–20 Personalize Icon



In the Customizing Saved Searches dialog, you can to change the search terms, add refiners, or choose the tools and services to search (Figure 3–21).

Figure 3–21 Customizing Saved Searches Dialog

3.3.3.5 Deleting a Saved Search

To delete a saved search:

1. Click **Manage** (Figure 3–22).

Figure 3–22 Save and Manage Buttons

2. The **Manage Saved Searches** window opens. In the Saved Searches drop-down list, select the saved search you want to delete.
3. Click the **Delete** button, then **Apply** and **OK**.

3.3.4 Setting Individual Preferences for Search Results

In addition to the customizations the system administrator can make to the way search results are displayed, individual users also can customize the way they see their results. Specifically, each user can control which tools and services are included in their search and the order in which they are listed in the results.

Note: When Oracle SES 11.2.2.2 is configured, these search preferences are not reflected in search results. Oracle SES 11.2.2.2 settings are configured by the system administrator on the Search administration page only.

When you search content, you may find that the results from one tool or service are more relevant to you than results from other tools. You may find it useful to be able to exclude some tools from a search and specify the order in which the results from selected tools are listed.

Use search preferences to choose the tools to search and specify the display order for search results. This section contains the following topics:

- [Section 3.3.4.1, "Selecting the Tools and Services to Search"](#)
- [Section 3.3.4.2, "Specifying a Display Order for Search Results"](#)

See Also: [Section 19.26, "Searching for Documents"](#)

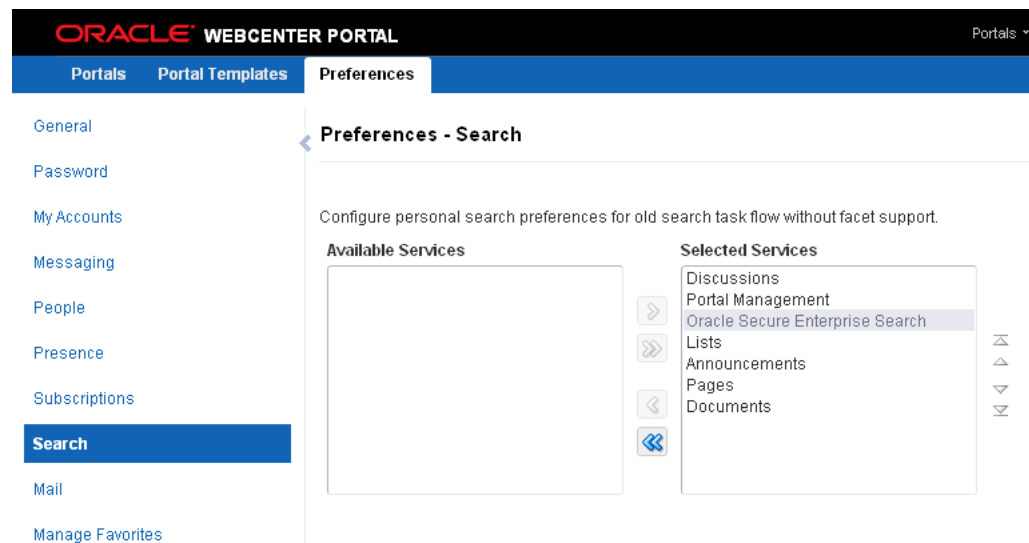
3.3.4.1 Selecting the Tools and Services to Search

Your WebCenter Portal application specialist makes tools and services available to WebCenter Portal. By default, all enabled services are selected to be searched. You can disable any service from which you do not want to see search results. For example, if you frequently search for a particular type of technology, including your personal contacts in the search is probably not useful.

To specify which tools and services should be searched:

1. Click the **Preferences** link at the top of WebCenter Portal.
2. Click **Search** to open the **Search Preferences** pane ([Figure 3–23](#)).

Figure 3–23 The Search Preferences Pane



3. To add a tool or service to a search, choose one or more services on the **Available Services** list and click the **Move selected items to list** icon to move them to the **Selected Services** list.

To remove a tool or services from search, choose one or more services on the **Selected Services** list and click the **Remove selected items from list** icon to move them to the **Available Services** list.

Note: When Oracle SES is configured in WebCenter Portal, Oracle SES cannot be deselected, and components that do not support searching with Oracle SES (such as Notes) are not listed.

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

Alternatively, click **Apply** to save your changes without exiting.

The selections you make in the **Selected Services** list are included in future searches. The services on the **Available Services** list are not searched.

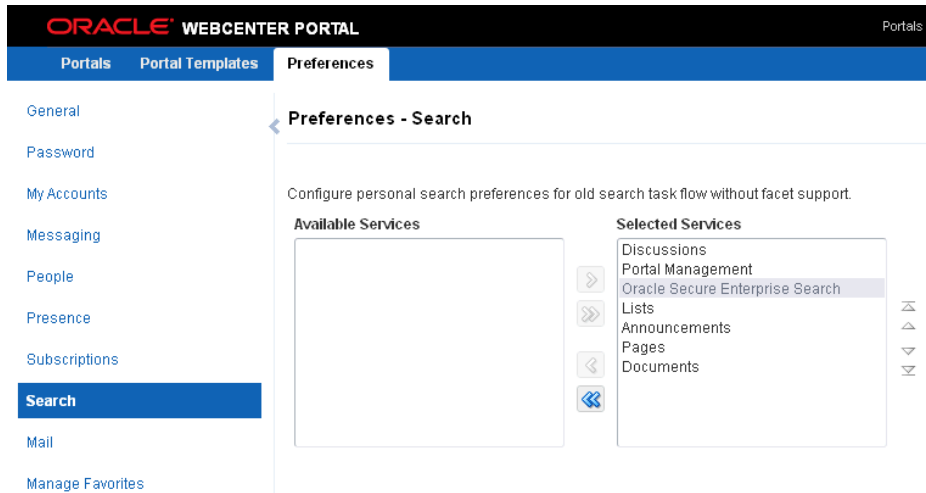
3.3.4.2 Specifying a Display Order for Search Results

You may find that some tools and services provide more relevant search results than others. For example, you may find that search results from Documents prove more useful than Lists. Preferences provide controls for specifying the order in which tools and services are listed in search results.

To specify a display order for search results:

1. Click the **Preferences** link at the top of WebCenter Portal.
2. Click **Search** to open the **Search Preferences** panel (Figure 3–24).

Figure 3–24 Search Preferences



3. Choose one or more tool or service on the **Selected Services** list and click the **Move** icons to the right of the list to move your selections higher or lower on the list.
The order you specify here determines the order they are listed in search results.
4. Click **OK** to save your changes and exit the Preferences dialog.
Alternatively, click **Apply** to save your changes without exiting.

3.4 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 more thorough search: It also searches list *column* names and contents.
- Users can the **Previous** and **Next** links to view any additional results (Figure 3–25). 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 3–25).

Figure 3–25 Estimated Number of Search Results

21 - 30 of about 1,240 | < Previous | 1 2 3 4 5 6 7 8 9 10 11 | Next >

Managing Your Favorites

This chapter describes how to create, organize, and manage Favorites. Favorites assist you in keeping a list of personal links to web sites and pages that is independent of the browser you use.

This chapter includes the following topics:

- [Section 4.1, "About Favorites"](#)
- [Section 4.2, "Accessing Your Favorites"](#)
- [Section 4.3, "Adding Favorites"](#)
- [Section 4.4, "Adding Favorites Folders"](#)
- [Section 4.5, "Managing Favorites in Preferences"](#)

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

4.1 About Favorites

The great advantage to WebCenter Portal Favorites is their portability. They are not dependent on a particular type of browser, so any browser you use to access WebCenter Portal provides access to your WebCenter Portal Favorites. You can create favorites that link to sites within WebCenter Portal or external sites. This makes WebCenter Portal the best choice for managing and tracking your favorites list.

Favorites are personal. The favorites you see on the **Favorites** menu are the favorites you create. No other user sees your favorites, and you do not see any other user's favorites. If you like, though, you can share favorites with other users, by making one or more of them discoverable in a search.

Favorites are created at the application level; consequently, when you move from one portal to another, the favorites on the **Favorites** menu stay the same.

WebCenter Portal provides a Manage Favorites page in Preferences, which you can use to further customize your favorites. Use the Manage Favorites page to:

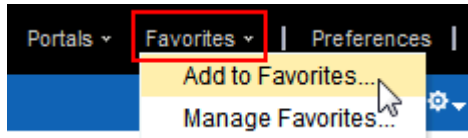
- Control the order of display of links on the **Favorites** menu
- Specify a method for opening a favorite target
- Create folders for organizing your favorites
- Create, edit, or delete favorite links and folders

For more information about the Manage Favorites page, see [Section 4.5, "Managing Favorites in Preferences."](#)

4.2 Accessing Your Favorites

The easiest way to access the Favorites user interface is to open the **Favorites** menu (Figure 4-1). However, the availability of navigational links and menus, such as the **Favorites** menu, is determined by the people who design and build your portal. This being so, you may not see a **Favorites** menu.

Figure 4-1 Favorites Menu



4.3 Adding Favorites

Add favorite links for quick access to WebCenter Portal pages and the web sites you find most useful. If you like, you can share favorites with other users by making one or more of them discoverable in a search. This section describes how to add new favorites and how to share them with other users.

Note: This section describes how to add favorites through the **Favorites** menu. You can also add favorites through the Manage Favorites page in Preferences. For more information, see [Section 4.5.1, "Adding a Favorite Using the Manage Favorites Page."](#)

You can add files, including wikis and blogs, to your Favorites through the Document Previewer. For more information, see [Section 19.25, "Adding a Folder or File to Your Favorites."](#)

To add a favorite:

1. The way you obtain your favorite's URL differs depending on the circumstances:
 - For pages external to WebCenter Portal, go to a favorite web location and copy its URL.
 - For WebCenter Portal pages, log in and go to the page you want to make a favorite.
 - If you know the URL, enter it manually when prompted.
2. Open the Add To Favorites dialog (for more information, see [Section 4.2, "Accessing Your Favorites"](#)).
3. In the **Name** field, enter a display name for the favorite ([Figure 4-2](#)).

Figure 4–2 Add To Favorites Dialog

Note: The value you enter for **Name** becomes the favorite's link text. The name of the current page is provided by default. You can change this or leave it as is.

4. In the **Web Address** field, enter the target URL for the favorite.
The default entry for this field is the URL of the current WebCenter Portal page; you have three options:
 - Leave the default entry (the path to the current page) as is.
 - Paste the URL you copied in step 1.
 - Enter the URL manually.
5. From the **Create In** pick list, select the favorites folder in which to create the favorite.

See Also: WebCenter provides one top-level default folder: **Favorites**. You can also create your own folders by clicking the **New Folder** button. For more information, see [Section 4.4, "Adding Favorites Folders."](#)

6. To enable this favorite to be discovered by other users during a search, select **Shared**.
Deselect **Shared** if you do not want other users to have any access to this favorite.
7. Click **OK** to add the favorite to the **Favorites** menu and the Manage Favorites page.

4.4 Adding Favorites Folders

To keep your list of favorites manageable, you can organize them into folders. The folder hierarchy you create appears on the **Favorites** menu and on the Manage Favorites page. Because the favorite folders you create are user-level customizations, they display only in your view of WebCenter Portal.

Note: This section describes one way to create favorites folders. You can also create them in the Manage Favorites page. For more information, see [Section 4.5.3, "Editing Favorites and Favorites Folders."](#)

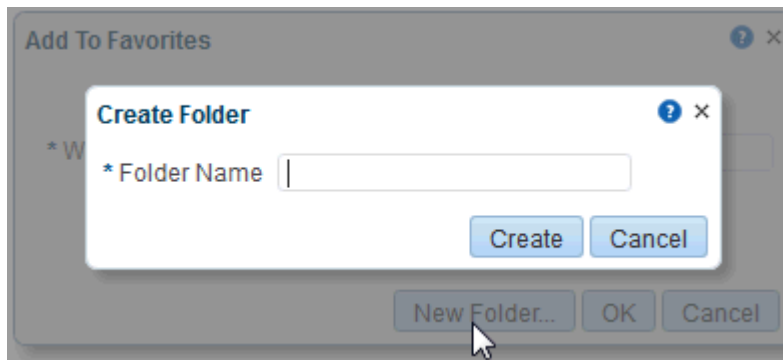
To add a favorites folder:

1. Open the Add To Favorites dialog.

See Also: For more information, see [Section 4.2, "Accessing Your Favorites."](#)

2. Click the **New Folder** button to open the Create Folder dialog ([Figure 4–3](#)).

Figure 4–3 *New Folder Button and Create Folder Dialog*



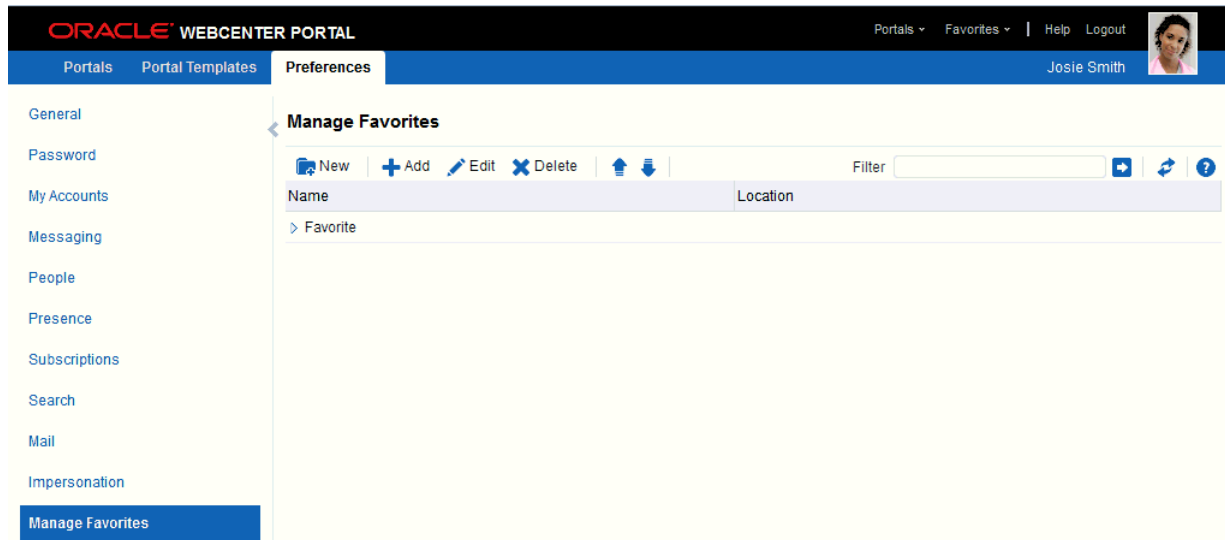
3. In the **Folder Name** field, enter a name for the new folder.
4. Click **Create** to save the new folder and close the Create Folder dialog.

The new folder appears as a selection in the Add To Favorites dialog on the **Create In** list.

5. Click **OK** to close the Add To Favorites dialog.

4.5 Managing Favorites in Preferences

The WebCenter Portal Manage Favorites page ([Figure 4–4](#)) in Preferences provides a convenient, one-stop location for creating, editing, and deleting favorite links and folders and rearranging their display order on the **Favorites** menu.

Figure 4–4 *Manage Favorites Page*

This section describes how to use the controls available on the Manage Favorites page. It contains the following subsections:

- [Section 4.5.1, "Adding a Favorite Using the Manage Favorites Page"](#)
- [Section 4.5.2, "Adding a Favorites Folder Using the Manage Favorites Page"](#)
- [Section 4.5.3, "Editing Favorites and Favorites Folders"](#)
- [Section 4.5.4, "Rearranging Favorites and Favorites Folders"](#)
- [Section 4.5.5, "Searching for Favorites"](#)
- [Section 4.5.6, "Deleting Favorites and Favorites Folders"](#)

4.5.1 Adding a Favorite Using the Manage Favorites Page

When you want to add multiple favorites, the best place to do this is on the Manage Favorites page. This is because the Manage Favorites page remains open until you close it, saving you steps in the creation process.

To add favorites through the Manage Favorites page:

1. Go to the web page of interest, and copy its URL.

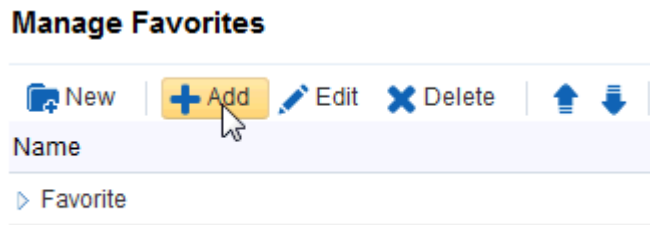
You can skip this step if you plan to enter the URL manually. For information about getting the URL of an application page, see [Section 9.14, "Viewing Information About a Personal Page"](#) (viewing information about a portal page works the same as viewing information about a personal page).

2. Open the Manage Favorites page (for more information, see [Section 4.2, "Accessing Your Favorites"](#)).
3. Select the folder in which to create the new favorite.

Tip: Select a folder by clicking in its row.

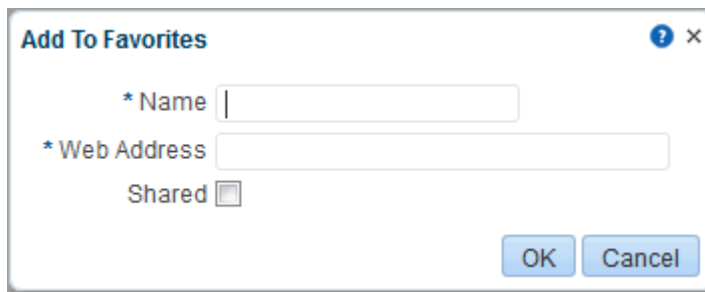
4. Click the **Add** button in the toolbar at the top of the window ([Figure 4–5](#)).

Figure 4–5 Add Button in Manage Favorites Page



5. In the resulting Add To Favorites dialog, in the **Name** field enter a display name for the favorite (Figure 4–6).

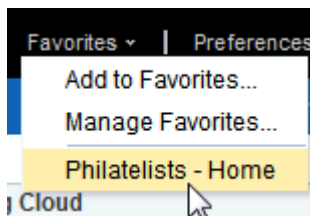
Figure 4–6 Add To Favorites Dialog



6. In the **Web Address** field, paste the URL you copied in step 1, or enter a URL manually.
7. To enable the sharing of this favorite in other users' search results, select **Shared**.
8. Click **OK**.

The new favorite appears in the Manage Favorites page and in the **Favorites** menu (Figure 4–7).

Figure 4–7 New Favorite in Favorites Menu



4.5.2 Adding a Favorites Folder Using the Manage Favorites Page

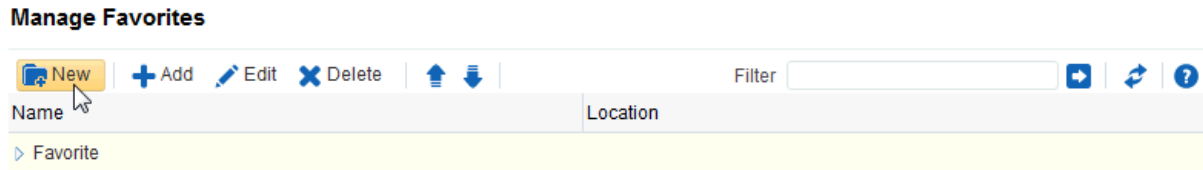
To keep your list of favorites manageable, you can organize them into folders. The folder hierarchy you create appears in the **Favorites** menu and on the Manage Favorites page. Because the favorite folders you create are user-level customizations, they display only in your view of WebCenter Portal.

In addition to adding favorites folders through the Add To Favorites dialog (see [Section 4.4, "Adding Favorites Folders"](#)) you can add them through the Manage Favorites page.

To add a favorites folder through the Manage Favorites page:

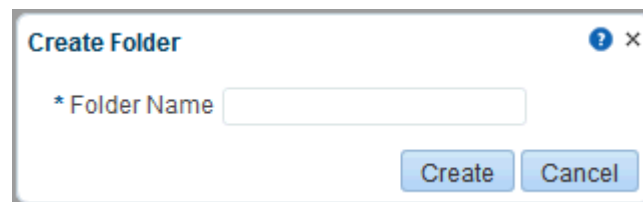
1. Open the Manage Favorites page (for more information, see [Section 4.2, "Accessing Your Favorites"](#)).
2. Select the folder in which to create the new folder, and click the **New** button in the toolbar at the top of the window ([Figure 4–8](#)).

Figure 4–8 New Button in Manage Favorites Page



3. In the resulting Create Folder dialog, in the **Folder Name** box enter a display name for the favorite folder ([Figure 4–9](#)).

Figure 4–9 Create Folder Dialog



4. Click **Create**.

The new folder appears on the Manage Favorites page and on the **Favorites** menu.

Note: Any Favorites folders you create but leave empty appear grayed out on the Favorites menu.

4.5.3 Editing Favorites and Favorites Folders

The Manage Favorites page provides controls for editing favorites and favorites folders. Use this feature to revise a folder or favorite name, a favorite target URL, or a open behavior for a favorite.

Open behavior determines how a favorite target URL opens from the **Favorites** menu or the Manage Favorites page. Select from opening a favorite target in the current browser window, a new browser window, or a new tab.

To edit a favorite or favorite folder:

1. Open the Manage Favorites page (for more information, see [Section 4.2, "Accessing Your Favorites"](#)).
2. If necessary, expand favorites folders to access the favorite or folder you want to edit.

Tip: To expand a folder, click the Expand icon to the left of the folder.

3. Select the favorite or favorite folder you want to edit, and click the **Edit** button in the toolbar to open the Edit Favorite dialog ([Figure 4–10](#)) or Edit Folder dialog.

Tip: To select a favorite or a folder, click in its row.

Figure 4–10 Edit Favorite Dialog

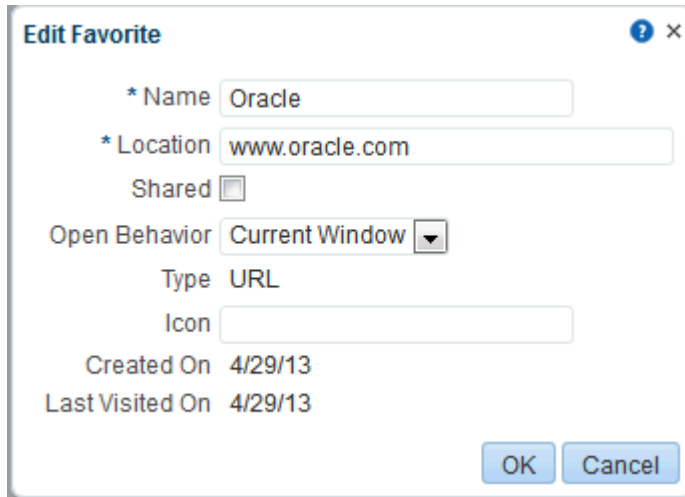


Table 4–1 lists and describes the types of values you can enter for the Edit Favorite and Edit Folder dialogs.

Table 4–1 Values Taken By Edit Favorite and Edit Folder Dialogs

Label	Applies To	Value
Name	Edit Favorite and Folder	The display name of the favorite or folder. This is the name that appears in the Favorites menu and on the Manage Favorites page.
Location	Edit Favorite	The favorite target URL.
Shared	Edit Favorite	Specify whether to allow other users to discover this favorite through a search. For example, if you create a favorite that includes the term <i>nanometrics</i> , sharing the favorite means that when another person searches for <i>nanometrics</i> in the portal, your shared favorite will be included in the search results. Selected means yes, deselected means no.
Open Behavior	Edit Favorite	An option for specifying how a favorite opens <ul style="list-style-type: none"> ■ New Window—The favorite opens in a new browser tab or window. ■ Current Window—The current browser window redraws, displaying the favorite target. <p>Note: The open behavior you specify for a Favorite does not apply to Favorites returned in a search. To control the open behavior of a Favorite returned in a search, right click the search result and select an open behavior from your browser's context menu.</p>
Type	Edit Favorite	The link type, always URL This field is read-only.

Table 4–1 (Cont.) Values Taken By Edit Favorite and Edit Folder Dialogs

Label	Applies To	Value
Icon	Edit Favorite and Folder	An option for providing an icon to display along with the display name shown in the Favorites menu Enter the full URL to the icon.
Created On	Edit Favorite and Folder	The date the favorite or folder was created This field is read-only.
Last Visited On	Edit Favorite	The date the favorite was last visited using the favorites link This field is read-only.

4. Make your changes.
5. Click **OK** to save your changes and close the Edit Favorites or Edit Folder dialog.

4.5.4 Rearranging Favorites and Favorites Folders

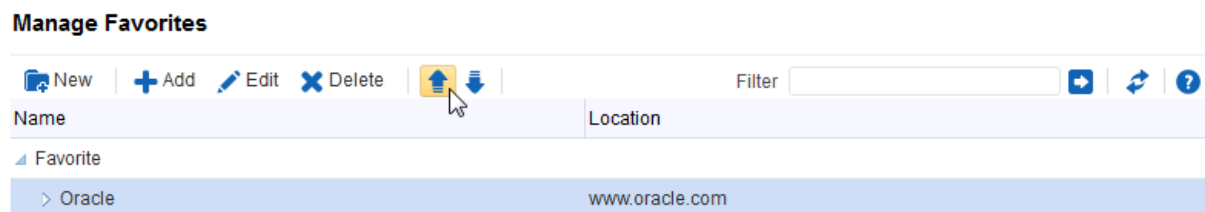
The Manage Favorites page provides controls for moving a favorite or a favorite folder higher or lower in the **Favorites** menu. You can accomplish a move by clicking icons or by dragging and dropping. Use this feature to arrange your view of the **Favorites** menu exactly to your liking.

To rearrange favorites and favorites folders:

1. Open the Manage Favorites page (for more information, see [Section 4.2, "Accessing Your Favorites"](#)).
2. If necessary, expand favorites folders and then select the favorite or folder you want to rearrange.

Tip: To select a favorite or a folder, click in its row.

3. Click the **Move Up** or **Move Down** icon in the toolbar to rearrange the selected favorite or folder ([Figure 4–11](#)).

Figure 4–11 Move Icons in Manage Favorites Page

Alternatively, drag the favorite or folder to its target position.

Note: To move a favorite into an existing folder, drag the favorite to its target folder. For keyboard users, create a duplicate favorite within the target folder, then delete the original favorite.

The favorite or folder is repositioned on the Manage Favorites page and in the **Favorites** menu.

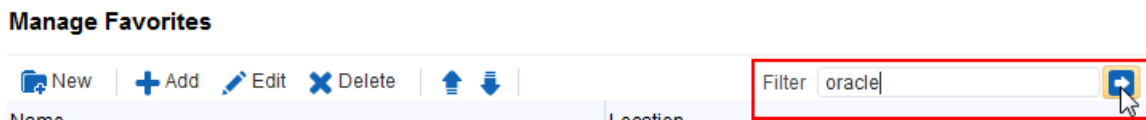
4.5.5 Searching for Favorites

Use the search feature on the Manage Favorites page to find a listed favorite. This is particularly useful when the list of favorites is long. You can search for favorite display names or target URLs. You cannot search for favorite folder names. Search results display on the Manage Favorites page.

To search for favorites:

1. Open the Manage Favorites page (for more information, see [Section 4.2, "Accessing Your Favorites"](#)).
2. Enter a search term in the **Filter** box, and click the **Filter** icon ([Figure 4-12](#)).

Figure 4-12 Filter Feature in Manage Favorites Page



Results display in the Manage Favorites page.

Tip: To exit search results, you must exit the Manage Favorites page. Alternatively, you can delete the search term from the **Filter** box and click the **Filter** icon. A search without a search term returns the Manage Favorites page to its default view.

4.5.6 Deleting Favorites and Favorites Folders

When you delete a favorite or a favorites folder, it is permanently removed from both the **Favorites** menu and the Manage Favorites page. Additionally, when you delete a favorites folder all the favorites it contains are also deleted.

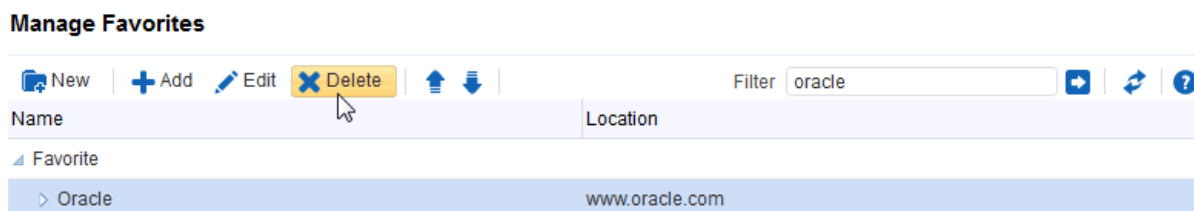
To delete favorites and favorites folders:

1. Open the Manage Favorites page (for more information, see [Section 4.2, "Accessing Your Favorites"](#)).
2. Select the favorite or favorite folder you want to delete.

Tip: To select a favorite or favorite folder, click in its row.

3. Click the **Delete** button on the toolbar ([Figure 4-13](#)).

Figure 4-13 Delete Button in Manage Favorites Page



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

The selected favorite or favorite folder and any favorites the folder contained are permanently removed from the Manage Favorites page and the **Favorites** menu.

Setting Your Personal Preferences

This chapter describes the personal preferences you can use to tailor WebCenter Portal to your particular working style. Preferences include settings for your preferred display language, your preferred look and feel, your password, and the like. Preferences also provide an accessibility setting for optimizing WebCenter Portal for a screen reader. Preference settings are a user-level customization that affects only your view of WebCenter Portal.

This chapter includes the following topics:

- [Section 5.1, "Accessing the Preferences Page"](#)
- [Section 5.2, "Setting Your Preferred Display Language"](#)
- [Section 5.3, "Setting Date and Time Preferences"](#)
- [Section 5.4, "Setting Your Accessibility Options"](#)
- [Section 5.5, "Changing the Look and Feel of Your View"](#)
- [Section 5.6, "Changing Your Application Password"](#)
- [Section 5.7, "Providing Login Information for External Applications"](#)

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

See Also: Preferences associated with specific areas of WebCenter Portal are discussed in the chapters that cover each area.

For information about messaging, subscription, and notification preferences, see:

- [Section 22.2, "Establishing and Managing Your Messaging Channels and Filters"](#)
- [Section 22.3, "Subscribing to the Application, to Portals, and to Objects"](#)
- [Section 22.4, "Viewing and Cancelling Your Subscriptions"](#)

For information about People Connections preferences, see:

- [Section 6.4, "Setting Profile Preferences"](#)
- [Section 11.2, "Setting Connections Preferences"](#)
- [Section 24.3, "Setting Activity Stream Preferences"](#)
- [Section 14.7, "Setting Message Preferences"](#)
- [Section 14.2, "Setting Feedback Preferences"](#)

For information about Instant Messaging and Presence preferences, see [Section 12.2, "Identifying Your Preferred Instant Messaging Provider."](#)

For information about Search preferences, see [Section 3.3.4, "Setting Individual Preferences for Search Results."](#)

For information about Mail preferences, see [Section 13.3, "Selecting Your Preferred Mail Connection."](#)

5.1 Accessing the Preferences Page

Click the **Preferences** link ([Figure 5–1](#)) to open the **Preferences** page ([Figure 5–2](#)).

Figure 5–1 *Preferences Link*



Note: The availability of navigational links, such as the **Preferences** link, is determined by the people who design and build your portal. This being so, you may not see a **Preferences** link. In such a case, ask your system administrator to make the **Preferences** link available.

Figure 5–2 Preferences Page

The screenshot shows the Oracle WebCenter Portal interface. At the top, there is a navigation bar with 'ORACLE WEBCENTER PORTAL' and 'Portals' on the right. Below this is a secondary navigation bar with 'Portals', 'Portal Templates', and 'Preferences'. The 'Preferences' section is active, and a left-hand navigation pane shows 'General' selected. The main content area is titled 'Preferences - General' and contains several settings:

- Language:** A dropdown menu currently set to 'No Preference'.
- Time Format:** A dropdown menu set to '1:08 PM'.
- Date Format:** A dropdown menu set to '4/17/13'.
- Time Zone:** A dropdown menu set to 'No Preference'.
- Accessibility Settings:** Three checkboxes:
 - I use a screen reader
 - I use high contrast colors
 - I use large fonts
- Application Skin:** A dropdown menu set to 'No Preference'.

5.2 Setting Your Preferred Display Language

The display language preference controls the language that user interface (UI) elements are rendered in your browser. UI elements include button and field labels, application links, screen text, and so on. Display language also provides options for reflecting the current locale. Locale controls the appearance of symbols, such as monetary symbols, and the reading direction in which UI text is rendered.

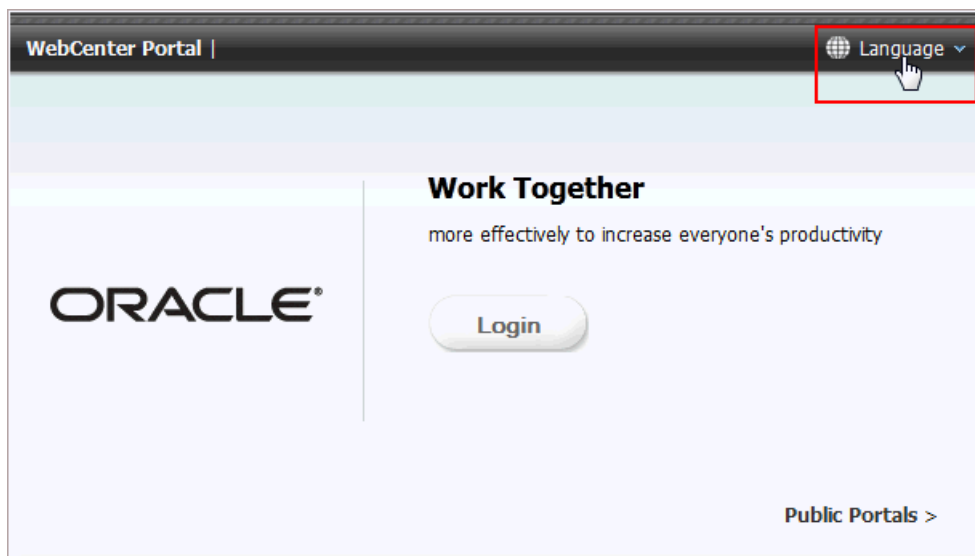
To set your display language:

1. Open the **Preferences** page (see [Section 5.1, "Accessing the Preferences Page"](#)).
2. Click **General** in the left navigation pane to access general preferences ([Figure 5–2](#)).
3. From the **Language** drop-down list, select your preferred display language locale.

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

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

Note: You can set your display language before you log in to WebCenter Portal by selecting a language in the language switcher on the Login page ([Figure 5–3](#)).

Figure 5–3 Language Switcher on Login Page

5.3 Setting Date and Time Preferences

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

Note: Some content may be developed with an intrinsic time display format. Such content is not affected by your date and time preference.

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

1. Open the **Preferences** page (see [Section 5.1, "Accessing the Preferences Page"](#)).
2. Click **General** in the left navigation pane to access general preferences ([Figure 5–2](#)).
3. Set your date and time preferences.

[Table 5–1](#) describes the available date and time options.

Table 5–1 Date and Time Preference Settings

Preference	Description
Time Format	<p>Select your preferred time format. The example formats show the current time.</p> <p>Note: The available time formats depend on the locale you selected from the Language list or the locale set for your browser. For example, if you select <code>English-United Kingdom [en-GB]</code>, the AM/PM is not included in the time format.</p> <ul style="list-style-type: none"> ■ No Preference—The default Time Format established by your system administrator ■ H:M AM/PM—Shows hour, minutes, and AM or PM, such as 4:47 PM ■ H:M:S AM/PM—Shows hour, minutes, seconds, and AM or PM, such as 4:47:52 PM ■ H:M:S AM/PM Time Zone—Shows hour, minutes, seconds, AM or PM, and the abbreviation of the specified time zone, such as 4:47:52 PM PDT ■ H:M:S o'clock Time Zone—(Not available for all locales.) Shows hour, minutes, seconds, "o'clock", and the abbreviation of the specified time zone, such as 4:47:52 o'clock PDT
Date Format	<p>Select your preferred date format. The example formats show the current date.</p> <p>Note: The available date formats depend on the locale you selected from the Language list or the locale set for your browser. For example, if you select <code>English-United Kingdom [en-GB]</code>, the dates are listed in day, month, year order.</p> <ul style="list-style-type: none"> ■ No Preference—The default date format set by your system administrator ■ M/D/YY—A number format, such as 4/21/09 ■ MON D, YYYY—An abbreviation format and the full year, such as Apr 21, 2009 ■ MONTH D, YYYY—The full month name and the full year, such as Apr 21, 2009 ■ DAY, MONTH D, YYYY—The full month name, the full year, and include the day of the week, such as Tuesday, April 21, 2009
Time Zone	Select your preferred time zone, or select No Preference to accept the application-level default set by your system administrator.

Your change is applied immediately.

5.4 Setting Your Accessibility Options

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

This section includes the following subsections:

- [Section 5.4.1, "About Application Accessibility Options"](#)
- [Section 5.4.2, "Applying Accessibility Options"](#)

5.4.1 About Application Accessibility Options

Although WebCenter Portal provides accessibility options to assist users in navigating the application user interface, these tips can assist in using them successfully.

Submenu Items

Normally, screen readers announce links associated with menu selections. With the **Actions** menu, screen readers do not announce submenu items. For example, they do not read the submenu items under **Manage**. The workaround is to select a menu item

using direct keyboard navigation. That is, instead of using your screen reader's Links Chooser, navigate to the **Manage** submenu of the **Actions** menu using the Tab key on your keyboard.

Unlabeled UI Objects

Not all drop-down menus, fields, and radio buttons on WebCenter Portal administration pages are labeled. As a result, screen readers render a pound sign (#) instead of a label when an Insert-F7 command is invoked. The problem occurs in the following areas:

- Drop-down menus in portal administration pages
- Radio buttons on portal administration pages
- Fields on the **Documents** page

The workaround is to use the Tab and arrow keys to navigate to each individual form field in order to hear each form field read.

Add Resources

When you add resources from the resource catalog, your screen reader announces all resource catalog items as *Add*. This makes it difficult to identify the selected resource. To work around this issue, press the Tab key to get to the Add link for the resource, then press the Down Arrow key. Your screen reader then reads the description of the resource.

5.4.2 Applying Accessibility Options

To apply accessibility options to the application UI:

1. Open the **Preferences** page (see [Section 5.1, "Accessing the Preferences Page"](#)).
2. Click **General** in the left navigation pane to access general preferences ([Figure 5-2](#)).
3. Next to **Accessibility Settings**, select your preferred accessibility settings:
 - **I use a screen reader**—Specifically for visually impaired users, enables the use of screen reader software.
 - **I use high contrast colors**—Makes the WebCenter Portal user interface compatible with operating systems or browsers that have high-contrast features enabled. For example, WebCenter Portal changes its use of background images and CSS styles in high-contrast mode to prevent the loss of visual information.

Note: High-contrast mode is more beneficial if used in conjunction with your browser's or operating system's high-contrast mode. Also, some users might find it beneficial to use large-font mode along with high-contrast mode.

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

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

Your changes are applied immediately.

5.5 Changing the Look and Feel of Your View

Use application skins to change the look and feel of your view of the Home portal. Application skins specify the application background color, screen fonts, and, with some skins, the shapes and images used for application buttons and icons.

The skin you select through the Preferences page affects only the look and feel of your view of the Home portal. No other users' views and no other areas of the application are affected.

To change the look and feel of your view:

1. Open the **Preferences** page (see [Section 5.1, "Accessing the Preferences Page"](#)).
2. Click **General** in the left navigation pane to access general preferences ([Figure 5-2](#)).
3. In the **Application Skin** list, select your preferred application skin:
 - **No Preference**—To defer to the application's configured skin setting
 - **Skin_Name**—To select a predefined application skin from the list of skins available to you

Note: Your system administrator makes skins available.

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

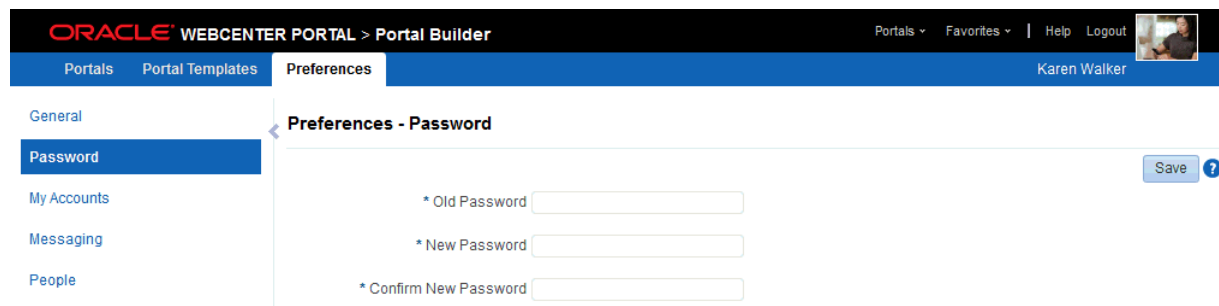
5.6 Changing Your Application Password

Provided your system administrator has enabled you to do so, you can change your WebCenter Portal password. Changing your password on a regular basis is one way you can participate directly in securing your application software.

To change your WebCenter Portal password:

1. Open the **Preferences** page (see [Section 5.1, "Accessing the Preferences Page"](#)).
2. Click **Password** in the left navigation pane to open the **Password** page ([Figure 5-4](#)).

Figure 5–4 Preferences - Password Page



3. In the **Old Password** field, enter your current password.
4. In the **New Password** field, enter your new password.

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

5. In the **Confirm New Password** field, enter your new password again.
6. Click **Save** to save your change.

5.7 Providing Login Information for External Applications

The **My Accounts** page is available for providing login credentials for all external applications that are configured to be accessed through WebCenter Portal. After you have provided your credentials, every time you access an external application within WebCenter Portal, the login credentials are provided automatically. This gives you a single-sign-on type of experience where one login (to WebCenter Portal) provides access to multiple applications.

Note: If you change the login credentials for an application, you must enter them again into the **My Accounts** page as described in this section.

To provide login credentials for external applications:

1. Open the **Preferences** page (see [Section 5.1, "Accessing the Preferences Page"](#)).
2. Click **My Accounts** in the left navigation pane to open the **My Accounts** page ([Figure 5–5](#)).

Figure 5–5 Preferences My Accounts Panel

The screenshot shows the Oracle WebCenter Portal interface. At the top, there is a navigation bar with 'Portals', 'Portal Templates', and 'Preferences'. The 'Preferences' section is active, and the 'My Accounts' sub-section is selected in the left sidebar. The main content area is titled 'Preferences - My Accounts' and displays a list of applications: 'Flights of Fancy', 'LCS', 'Mail', 'My Yahoo!', and 'xApp_PE'. The 'Mail' application is highlighted, and its login fields are shown: '* User Name', '* Password', 'Email Address', and 'Your Name'. There is also a 'Reply-To Address' field and a checked checkbox for 'Remember My Login Information'. An 'Apply' button is located at the bottom right of the form.

3. Enter login credentials as required for the selected application.

Login credential fields and check boxes for the selected application are shown in the right pane. Fields requiring values are marked with an asterisk (*).

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

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

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

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

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

Managing Your Profile

This chapter describes how to view and manage your profile in WebCenter Portal. Your profile is a collection of useful data about you that can include contact information, a profile photo, your position relative to others in your organization, and so on. The social networking capabilities in WebCenter Portal enable you to view and manage your own profile and to view the profiles of others if they have made them available to you.

Note: For information on viewing other users' profiles, see [Section 11.3, "Viewing Another User's Profile."](#)

This chapter includes the following topics:

- [Section 6.1, "About Profiles"](#)
- [Section 6.2, "Viewing a Profile"](#)
- [Section 6.3, "Editing Your Profile"](#)
- [Section 6.4, "Setting Profile Preferences"](#)

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

6.1 About Profiles

When you connect with other users, you give them access to your profile, and gain access to theirs. Your profile can include contact information, portal activity for your connections, a list of your connections, a view of your personal document library, a view of your location in your organization's hierarchy, recommended connections, and a list of your top contributions.

You can control how much of your profile a connection can view through profile preferences. For information about setting your profile preferences, see [Section 6.4, "Setting Profile Preferences."](#)

Your system administrator can set global defaults that affect what all users may see and do in profiles. Some profile information is pulled from the user database that WebCenter Portal uses. Depending on how your system administrator configured the user database, your profile may not show all the information discussed in this chapter and some profile information may not be editable. Because your system administrator can customize how profile information is rendered in WebCenter Portal, the

screenshots embedded with this information may not match what you see in your organization's version of WebCenter Portal.

Notes:

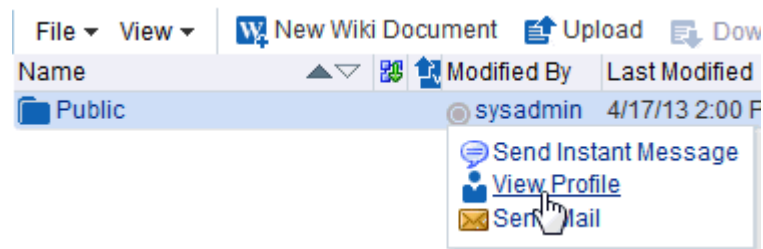
- The Profile user interface was updated in 11g Release 1 (11.1.1.9.0). Depending on how your system administrator configured your installation of WebCenter Portal, you might see the legacy Profile user interface. For information on the legacy Profile user interface, see the "Managing Your Profile" chapter in the *User's Guide for Oracle WebCenter Portal: Spaces* for 11g Release 1 (11.1.1.7.0).
 - Fields without any content do not appear in some profile views.
-
-

6.2 Viewing a Profile

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

In some application contexts, such as in a Document Library or an announcement, a context menu opens in lieu of a profile popup (Figure 6–1). Select **View Profile** to view the user's profile.

Figure 6–1 View Profile Option on the Documents Page



For more information, see:

- [Section 6.2.1, "Profile Popup"](#)
- [Section 6.2.2, "Profile Page"](#)

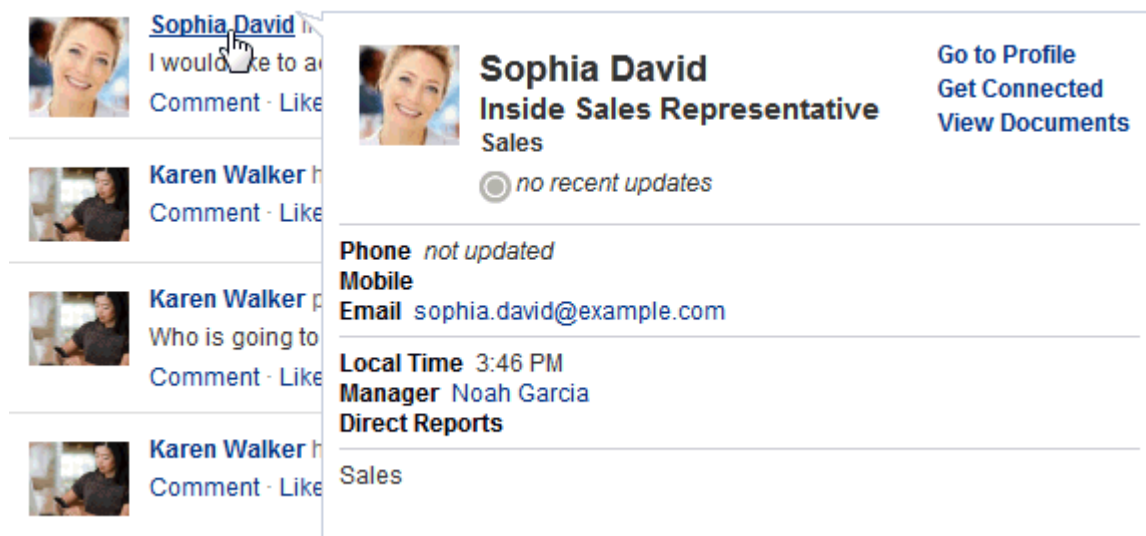
You can also see profile information in one of these views that can be added to a portal page:

- [Section 6.2.3, "Organization View"](#)
- [Section 6.2.4, "Profile"](#)
- [Section 6.2.5, "Profile Gallery"](#)
- [Section 6.2.6, "Profile Snapshot"](#)

6.2.1 Profile Popup

Click a user name wherever it appears in the application to view your own profile in a popup or the profiles of your connections or fellow portal members.

Figure 6–2 Profile Popup

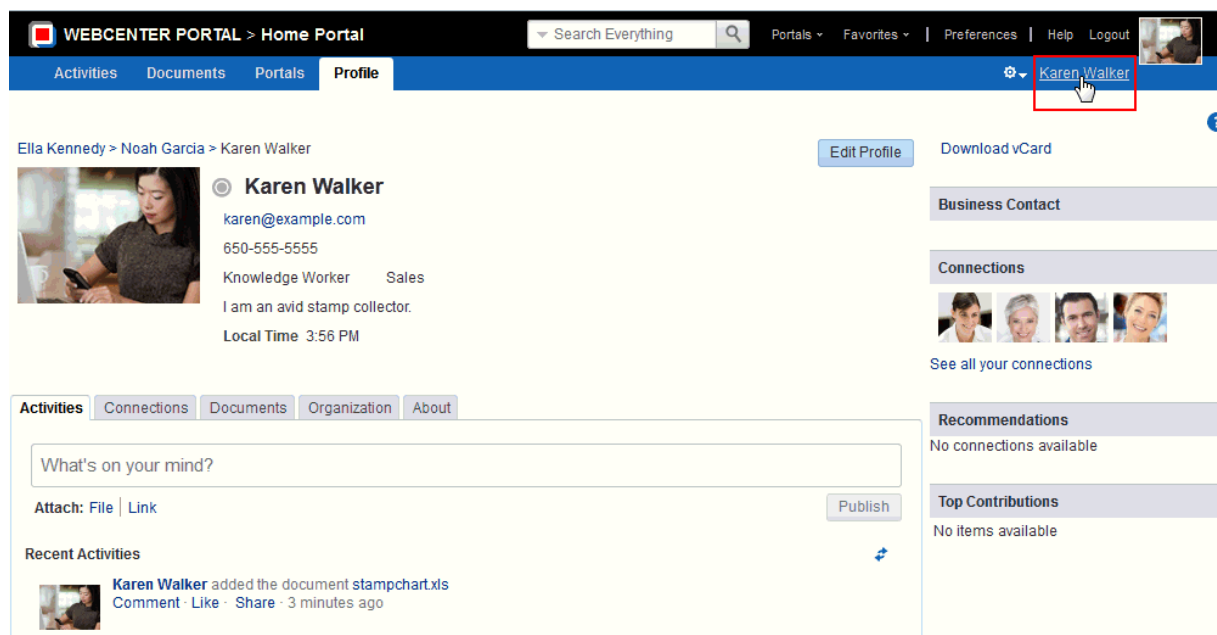


In the popup, click **Go to Profile** to view additional profile details on the WebCenter Portal **Profile** page (described next).

6.2.2 Profile Page

You can view the full details of a profile on the WebCenter Portal **Profile** page by clicking **Go to Profile** in the profile popup or by clicking your own name at the top of the application.

Figure 6–3 Profile Page



Note: The **Profile** page is a business role page included in the Home portal of all users who are logged in to WebCenter Portal.

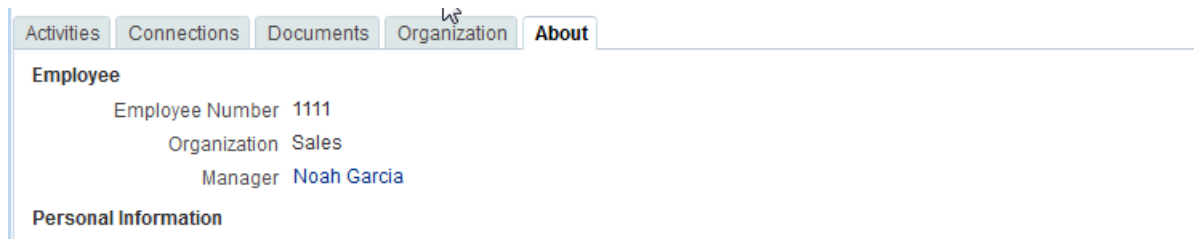
By default, the **Profile** page presents the following information:

- Your contact information, such as photo, email address, position, business phone number and address, and so on.
- A view of your activities and those of your connections on the **Activities** tab. For more information, see [Chapter 24, "Tracking Portal Activities."](#)
- A brief list of your connections on the main **Profile** page, and a detailed view of your connections on the **Connections** tab. For more information, see [Chapter 11, "Managing Your Contacts."](#)
- A view of the documents and folders in the Public folder of your personal document library on the **Documents** tab. For more information, see [Part IV, "Working with Documents"](#).

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

- A chart view of your location within the organization on the **Organization** tab.
- A view of additional profile details on the **About** tab ([Figure 6-4](#)).

Figure 6-4 About Tab on Profile Page



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

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

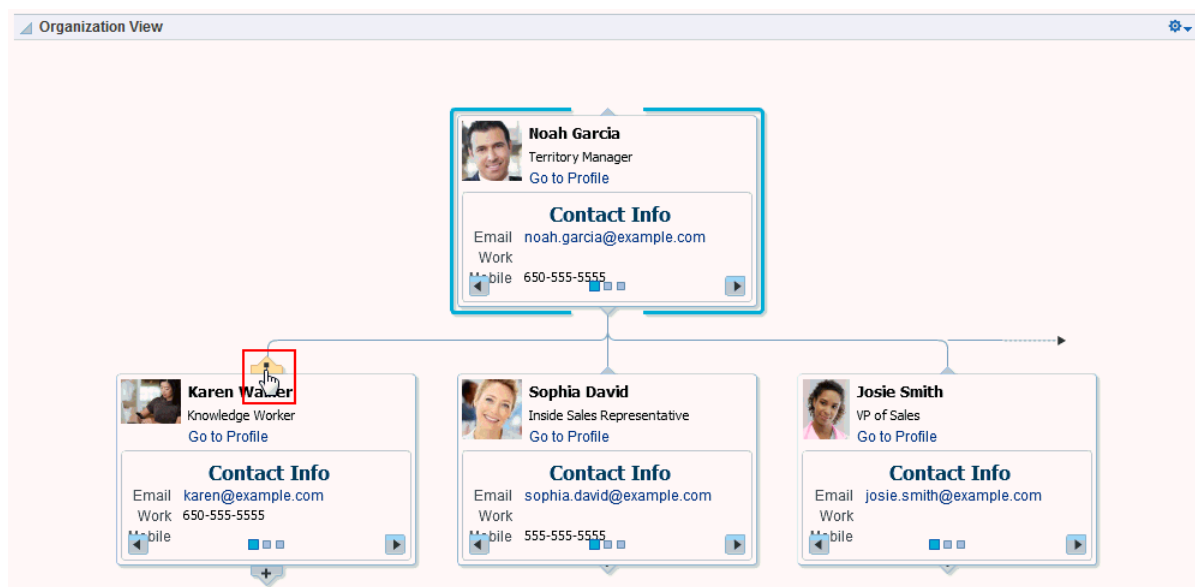
Your system administrator can revise the default **Profile** business role pages to include additional components, remove existing components, and revise the page look and feel. Consequently, the page described in this guide may be different than the **Profile** page that you see. However, the basic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

Note: Fields without any content do not appear on the Profile page.

6.2.3 Organization View

The Organization View (Figure 6–5) can be added to a portal page to present a graphical depiction of the user's position within the company—that is, a detail of the overall organization chart. In Organization View, you can click through three views of the user's profile information, including contact information; the user's address and current time in the user's locale; and a summary About Me statement. You can also expand the Organization View to show the user's reports or managers.

Figure 6–5 Organization View



6.2.4 Profile

The Profile viewer (Figure 6–6) can be added to a portal page to display a user's profile details. If you are viewing your own profile, the Profile viewer allows you to upload a profile photo and (if enabled) allows you to edit your profile details.

Figure 6–6 Profile

Profile ⚙️

Karen Walker 🌐
 Knowledge Worker, Sales
 When is everyone leaving for the tradeshow?

What's on your mind?

Attach: [File](#) | [Link](#) Share with: [Everyone](#) ▼ [Publish](#)

[Upload](#) [Clear](#) [Refresh](#)

Summary [Edit](#)

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 [Edit](#)

Employee Type	FullTime
Employee Number	ORAK9DZ5
Preferred Language	US-English
Organization	Oracle

Business Contact [Edit](#)

Personal Information [Edit](#)

Date of Hire	20120101151052.593
--------------	--------------------

Note: Fields without any content do not appear in the Profile view.

6.2.5 Profile Gallery

The Profile Gallery ([Figure 6–7](#)) can be added to a portal page to provide access to all of your social networking information.

Figure 6–7 Profile Gallery

Profile Gallery

Karen Walker Knowledge Worker, Sales
When is everyone leaving for the tradeshow?

What's on your mind?

Attach: File | Link Share with: Everyone ▾ Publish

View Profile

Profile

Email karen@example.com
Phone 650-555-5555
Time Zone America/Los_Angeles
Manager Noah Garcia

Connections

Invite / Manage Connections Find Connection

No connections to display.

Feedback

View Received ▾

No data to display.

Activity Stream

Today

- Karen Walker changed 6 pages 5 minutes ago

Yesterday

- Karen Walker has created the portal Sales Portal
- Karen Walker changed the page Sales
- Karen Walker created the page Sales
- Karen Walker posted messages When is everyone leaving for the tradeshow?
- Karen Walker added the document ExampleUsers.xls These are example users

Message Board

Karen Walker
When is everyone leaving for the tradeshow?
12:42 PM on 6/5/13 - Comment - Like

Note: Empty fields (fields without any content) do not appear in the Profile Gallery views.

6.2.6 Profile Snapshot

The Profile - Snapshot viewer (Figure 6–8) can be added to a portal page to display a user's photo and status message.

Figure 6–8 Profile - Snapshot

Profile - Snapshot

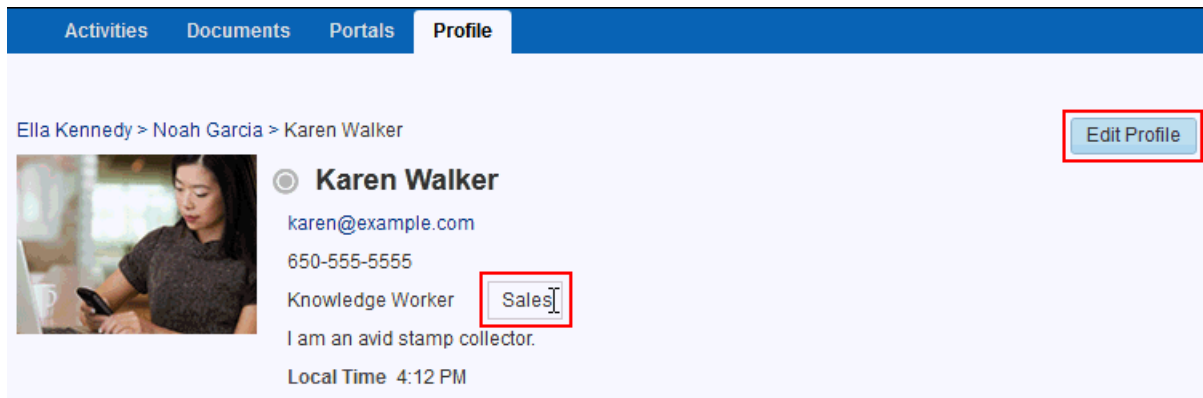
Karen Walker Knowledge Worker, Sales
When is everyone leaving for the tradeshow?

What's on your mind?

Attach: File | Link Share with: Everyone ▾ Publish

6.3 Editing Your Profile

Your system administrator determines how much of your personal profile you may edit. When you have permission to edit your profile, an **Edit Profile** button appears on the **Profile** page (Figure 6–9). In addition, when you place your cursor over information that is editable, a gray box appears around editable information.

Figure 6–9 Edit Profile Button and Editable Information on a Profile

Click the **Edit Profile** button or an editable piece of information to open an edit view of your personal profile.

Notes:

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

To edit your personal profile:

1. Open your **Profile** page (as described in [Section 6.2.2, "Profile Page"](#)).
2. Click **Edit Profile** or one of the editable pieces of information to open your profile in edit mode ([Figure 6–10](#)).

Figure 6–10 Profile in Edit Mode

The screenshot displays the 'Profile in Edit Mode' interface. At the top, there is a navigation bar with 'WEBCENTER PORTAL > Home Portal', a search bar, and user options like 'Portals', 'Favorites', 'Preferences', 'Help', and 'Logout'. Below this, a secondary navigation bar shows 'Activities', 'Documents', 'Portals', and 'Profile' (selected). The user's name 'Karen Walker' is visible in the top right.

The main profile area shows the user's name 'Karen Walker' and a profile picture. Below the name are input fields for 'Email' (karen@example.com), 'Phone' (650-555-5555), 'Job Title' (Knowledge Worker), and 'Department' (Sales). A bio field contains the text 'I am an avid stamp collector.' and a 'Time Zone' dropdown set to '(UTC-08:00) Los Angeles - Pacific Time (PT)'. There are 'Cancel' and 'Save' buttons, and a 'Download vCard' link.

On the right side, there are sections for 'Business Contact', 'Connections' (with profile pictures of other users), 'Recommendations', and 'Top Contributions' (listing files like 'Member Meeting Schedule.htm', 'lincoln stamps.doc', 'lincoln stamps large.pdf', 'Upcoming Events', and 'lincoln stamps_files.zip').

At the bottom, there are tabs for 'Activities', 'Connections', 'Documents', 'Organization', and 'About' (selected). Under 'About', there is an 'Employee' section with fields for 'Employee Type' (FullTime), 'Employee Number' (ORAK9DZ5), 'Organization' (Oracle), 'Manager' (Noah Garcia), 'Expertise', and 'Preferred Language' (US-English). Below that is a 'Personal Information' section with a 'Date of Hire' field (20120101151052.593).

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

6.3.1 Uploading and Updating a Personal Profile Picture

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

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

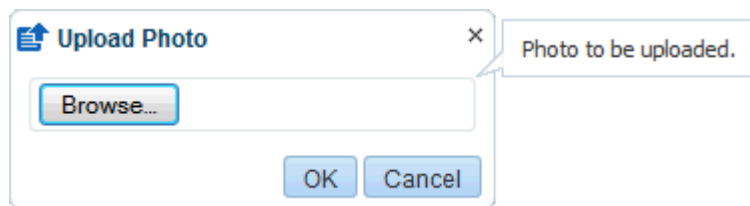
To upload or update your profile image:

1. Open your **Profile** page (as described in [Section 6.2.2, "Profile Page"](#)).
2. Click **Edit Profile**.
3. Upload, change, or remove your photo:

To upload or change your photo:

- a. Click **Change** to open the Upload Photo dialog ([Figure 6–11](#)).

Figure 6–11 Upload Photo Dialog



- b. Click **Browse** to locate and select a photo.
- c. Click **OK** to complete the upload.

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

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

6.4 Setting Profile Preferences

The profile details that are affected by your preferences settings appear in your full profile view, for example, in the Profile viewer and on the **About** tab of the default **Profile** business role page (Figure 6–12).

Figure 6–12 About Tab on Profile Page



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

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

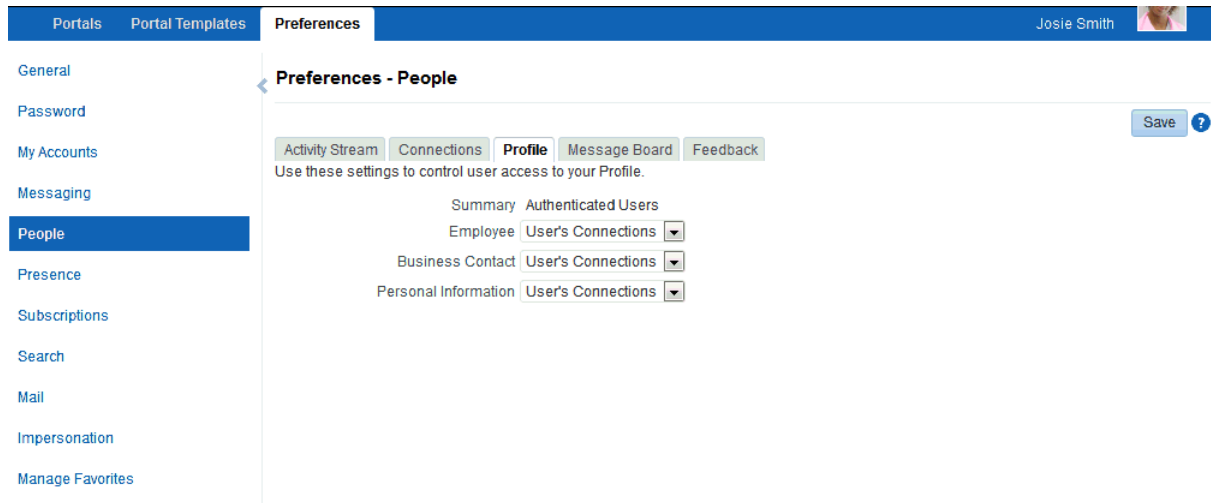
Use profile preferences to specify who can view different types of information associated with your personal profile.

To set profile preferences:

1. Click **Preferences**.
2. Click **People** to display People Connections preferences.

3. Click the **Profile** tab (Figure 6–13).

Figure 6–13 Profile Preferences



For each section of your personal profile, specify the users who can view it:

- **Everyone**—All users, including users who are not logged in, can view the associated section of your profile.
 - **Authenticated Users**—Only users who are logged in can view the associated section of your profile.
 - **User's Connections**—Only you and your connections can view the associated section of your profile.
 - **User Only**—Only you can view the associated section of your profile.
4. When you are done, click **Save**.

Using WebCenter Portal Impersonation

This chapter describes how to use WebCenter Portal Impersonation, which lets designated users impersonate other WebCenter Portal users and perform operations as those users. It provides instructions for initiating an impersonation session (by the impersonator) and allowing an impersonation session (by the impersonatee).

This chapter includes the following topics:

- [Section 7.1, "About WebCenter Portal Impersonation"](#)
- [Section 7.2, "Allowing an Impersonation Session"](#)
- [Section 7.3, "Initiating an Impersonation Session"](#)
- [Section 7.4, "Troubleshooting"](#)

Note: Tasks discussed in this chapter are not available if WebCenter Portal Impersonation is not enabled for the current WebCenter Portal domain. For more information, see the "Preparing WebCenter Portal for Impersonation" section in *Administering Oracle WebCenter Portal*. For instructions on how to configure and manage WebCenter Portal Impersonation, see the "Managing Impersonation" chapter in *Administering Oracle WebCenter Portal*.

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

7.1 About WebCenter Portal Impersonation

WebCenter Portal Impersonation lets a WebCenter Portal administrator or system administrator assign impersonation rights to a group of users ("impersonators"), such as support representatives or application administrators, so that they can impersonate another Portal user and perform operations as that user ("impersonatees"). This may be useful in the following instances:

- A customer support representative may want to perform actions as another user in order to understand the issues being faced by that user
- An administrator may want to perform operations on behalf of a user

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

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

7.2 Allowing an Impersonation Session

This section describes how impersonatees can grant impersonation rights to designated impersonators.

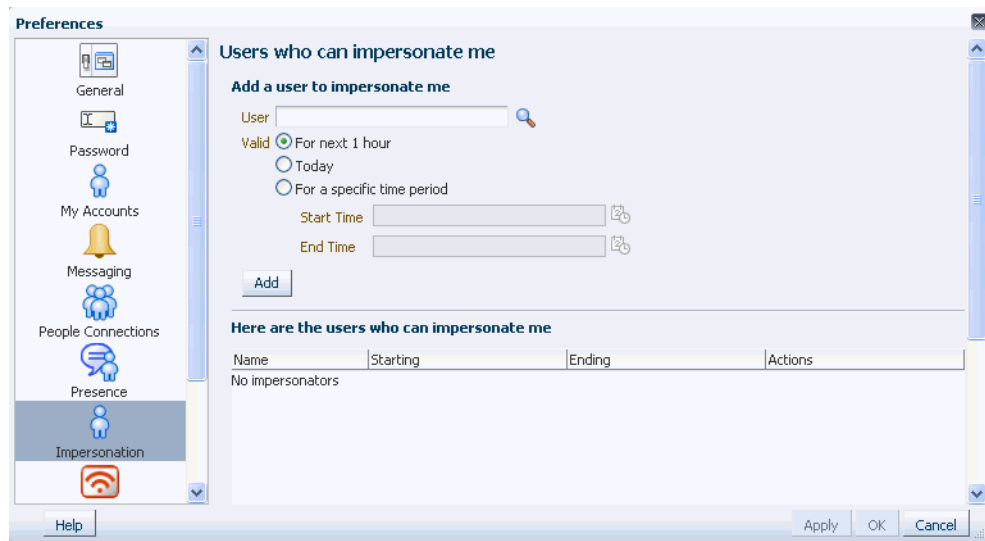
You can allow someone to impersonate you during a specified time slot using the My Impersonators screen. Note that impersonators will not be able to access the My Impersonators screen during an impersonation session.

To allow an impersonation session:

1. Log onto WebCenter Portal and click **Preferences**.
2. From the Preferences screen, click **Impersonation**.

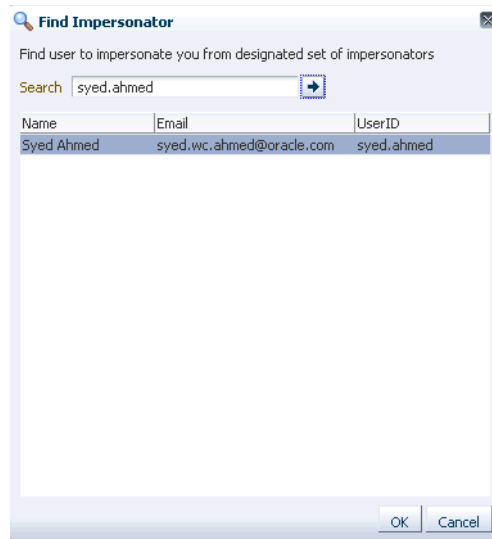
The Impersonation Preferences screen displays (see [Figure 7-1](#)).

Figure 7-1 Impersonation Preferences Screen



3. Enter the **User** name or use the Search function to find the user to set up with an impersonation session as shown in [Figure 7-2](#), and then click **OK**.

Note that only those users who have been granted impersonator privileges by the System Administrator will appear.

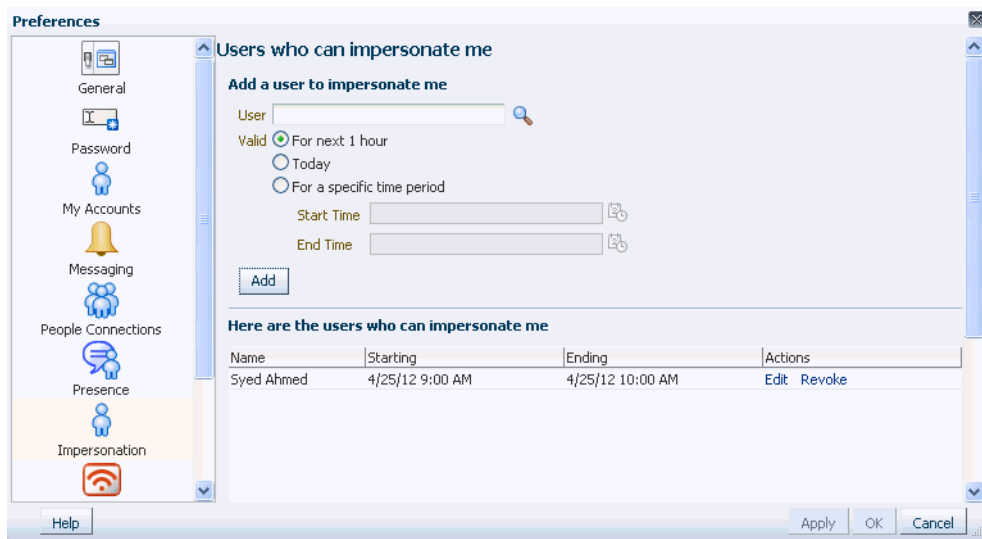
Figure 7-2 Find Impersonator Screen

4. Select the time slot during which the impersonator can impersonate you (see [Figure 7-3](#)), and then click **Add** to add the user to the list of impersonators that can impersonate you.

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

You can select:

- **For Next 1 hour** to allow an impersonator to initiate an impersonation session during the next hour.
- **Today** to allow an impersonator to initiate an impersonation session during the current day. Note that "today" means the end of today as defined by your selected time zone and preferences
- **For a specific time period** to allow an impersonator to conduct an impersonation session during a specific time slot for your time zone and preferences.

Figure 7-3 Impersonation Preferences Screen with Impersonator

The impersonator can now conduct an impersonation session during the allotted time.

5. After adding an impersonator you can change the time slot or revoke impersonation rights.
 - To edit the impersonation session time slot, click **Edit**, change the start and end times, and click **OK**.
 - To revoke an impersonation grant, click **Revoke** and then click **Revoke** again when prompted.

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

7.3 Initiating an Impersonation Session

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

This section contains the following subsections:

- [Section 7.3.1, "Initiating an Impersonation Session Using the Impersonation Preferences Screen"](#)
- [Section 7.3.2, "Initiating an Impersonation Session Using a Hot Key"](#)

7.3.1 Initiating an Impersonation Session Using the Impersonation Preferences Screen

You can view the impersonatees that have granted you impersonation rights and can initiate impersonation sessions using the Impersonation Preferences screen. Note that you must have been granted impersonation rights to access this screen by the administrator (see the "Configuring Impersonators" section in *Administering Oracle WebCenter Portal*).

To view or start impersonation sessions:

1. Log into WebCenter Portal and click **Preferences**.

2. From the Preferences screen, click **Impersonation**.

The Impersonation Preferences screen displays (see [Figure 7-4](#)).

Figure 7-4 Impersonation Preferences Screen (Top)

Name	Starting	Ending
Syed Ahmed	7/1/13 3:28 PM	7/1/13 4:28 PM

At the top of the screen is a list of users who can impersonate you (see [Figure 7-4](#)), and if you scroll to the bottom you will see a list of the users that have granted you impersonation rights (see [Figure 7-5](#)). Note that unless you have been configured as an impersonator, you will not be able to impersonate other users and the list will be empty.

Figure 7-5 Impersonation Preferences Screen (Bottom)

Users whom I can impersonate

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

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

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

3. To initiate an impersonation session from the Impersonation Preferences screen:
 - a. Click **Switch User** to select the user to impersonate.
 - b. When prompted, confirm your credentials to start the impersonation session.

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

Figure 7–6 Impersonation Session - Impersonatee's Screen with Impersonation Overlay

- c. Click **Stop Impersonation** on the impersonation overlay (see [Figure 7–6](#)), or from your (the impersonator's) Impersonation Preferences screen to end the impersonation session.

7.3.2 Initiating an Impersonation Session Using a Hot Key

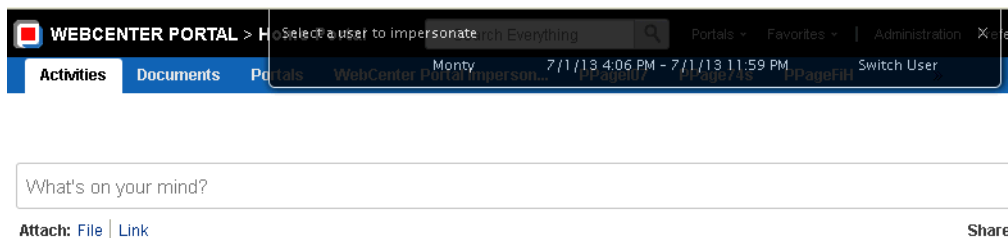
You can initiate an impersonation session using a hot key from within WebCenter Portal at any time provided that you have been granted impersonation rights (see the "Configuring Impersonators" section in *Administering Oracle WebCenter Portal*), and that one or more impersonatees have set up an impersonation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

To initiate an impersonation session using a hot key:

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

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

The impersonation overlay displays (see [Figure 7–7](#)).

Figure 7–7 Impersonation Overlay

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

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

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

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

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

4. Click **Stop Impersonation** on the impersonation overlay (see [Figure 7-6](#)), or from the impersonatee's Impersonation Preferences screen click **Stop Impersonation**, to end the impersonation session.

7.4 Troubleshooting

This section describes common error conditions and their solutions

- [Section 7.4.1, "Clicking Switch User Produces an Error"](#)
- [Section 7.4.2, "Clicking Stop Impersonation Produces an Error"](#)

7.4.1 Clicking Switch User Produces an Error

Problem

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

Solution

The access time may not fall within the impersonation session's allotted time slot. Check the duration on the Impersonation Preferences screen and try again. Alternatively, you can ask the impersonatee to revoke your impersonation rights and grant them to you again. If this fails to resolve the problem then contact the system administrator to inspect the OAM logs to determine the problem.

Also, if you enter incorrect credentials on the consent page the impersonation session will not begin and you will be taken to an error page. To resolve this error, return to your home page and begin the impersonation session again.

One final reason why initiating impersonation session may fail, even when it looks like you are trying to impersonate within the correct duration, is because the OAM server and WebCenter Portal server clocks are not in sync. If you have checked that you are trying to start a session within the correct time frame, and that your credentials are correct contact your administrator to see if this may be the case. Configuring OAM and WebCenter Portal's server clock settings is described in the "Configuring WebCenter Portal for Impersonation" section in *Administering Oracle WebCenter Portal*.

7.4.2 Clicking Stop Impersonation Produces an Error

Problem

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

Solution

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

Part II

Working with Portals and Pages

Part II contains the following chapters:

- Chapter 8, "Working In the Home Portal"
- Chapter 9, "Creating and Managing Personal Pages"
- Chapter 10, "Exploring Portals"

Working In the Home Portal

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

This chapter includes the following sections:

- [Section 8.1, "About the Home Portal"](#)
- [Section 8.2, "Accessing the Home Portal"](#)
- [Section 8.3, "Pages in the Home Portal"](#)
- [Section 8.4, "What You Can Do In the Home Portal"](#)

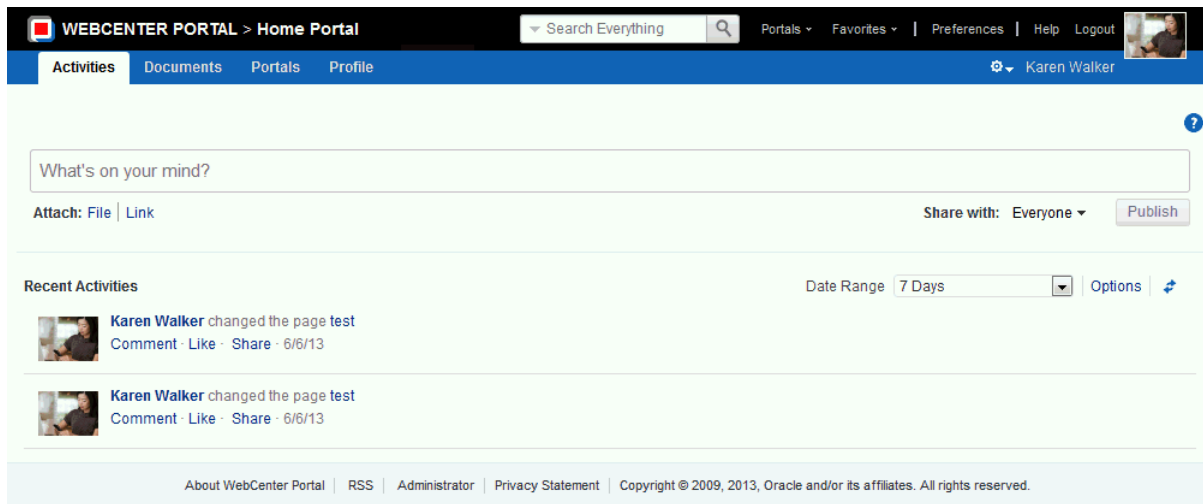
Permissions: The tasks described in this chapter are available to any WebCenter Portal user minimally assigned the role `Authenticated-User`; that is, any user who is logged in.

8.1 About the Home Portal

The *Home portal* ([Figure 8-1](#)) is the area where you have access to WebCenter Portal activities, your personal documents, the portal browser, and your profile. You can also create your own *personal pages* in the Home portal, and system administrators can expose *system pages* and *business role pages* to selected audiences.

Note: Your system administrator may choose to prohibit the creation of personal pages.

Figure 8–1 The Home Portal



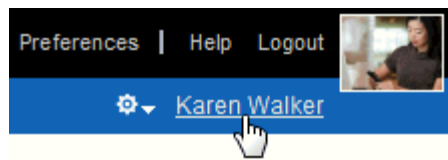
8.2 Accessing the Home Portal

When you log in to WebCenter Portal, the default landing page is the *Home portal*. Your system administrator may have changed the landing page to a different portal or page.

Depending on the navigation model, you may have a number of ways to access the Home portal. For example:

- Use the following URL:
<http://host:port/webcenter/portal/home>
- Click your user name where it appears as a link in the menu bar, as shown in [Figure 8–2](#).

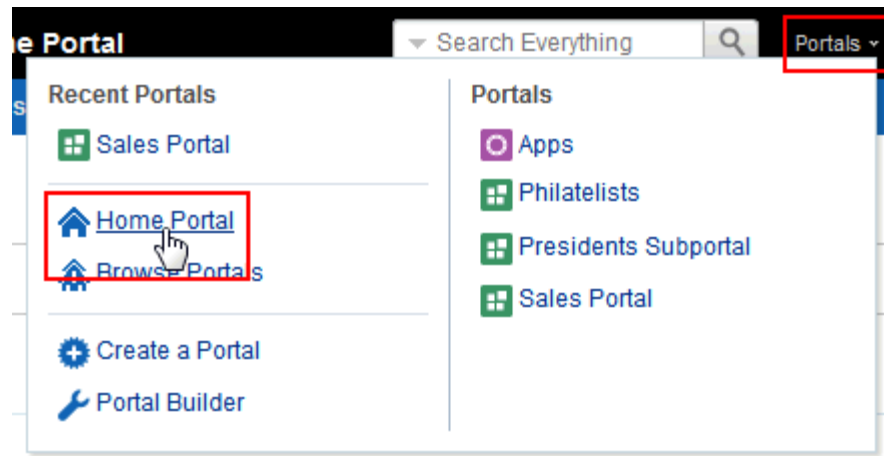
Figure 8–2 Example of a User Name as a Link



This takes you to the **My Profile** page in the Home portal.

- Click the **Portals** menu, and select **Home Portal** ([Figure 8–3](#)).

Figure 8-3 Home Portal Option on the Portals Switcher Menu



8.3 Pages in the Home Portal

By default, the Home portal includes the following pages:

- **Activities:** Includes Publisher, which you can use to make statements about your personal status and provide links to external or internal objects; and Recent Activities, which streams information about activities WebCenter Portal. For more information, see [Section 15.7, "Sharing Messages, Files, and URLs"](#) and [Chapter 24, "Tracking Portal Activities."](#)
- **Documents:** Provides a view of your personal document library, where you can create, view, and manage your documents. For more information, see [Part IV, "Working with Documents."](#)
- **Portals:** Provides access to available portals, including managing your portal memberships. For information, see [Chapter 10, "Exploring Portals."](#)
- **Profile:** Displays information about you, such as contact information, a photo, your location within the company hierarchy, and so on. It also provides access to your *connections*, other WebCenter Portal users with whom you communicate or collaborate. For information on your profile, see [Chapter 6, "Managing Your Profile."](#) For information on your connections, see [Chapter 11, "Managing Your Contacts."](#)

Additionally, any personal pages you create are available in the Home portal. See [Chapter 9, "Creating and Managing Personal Pages."](#)

Some pages are hidden by default:

- **Portal Templates:** This page is intended for advanced users who build portals and custom portal templates. For more information, see the "Working with Portal Templates" chapter in *Building Portals with Oracle WebCenter Portal*.
- **Tag Center:** Allows you to view and manage tags on WebCenter Portal objects. Tags provide a means of applying your own meaningful terms to and bookmark application objects, making them easy to locate the next time you go looking for them. For more information, see [Chapter 33, "Working with Tags."](#)
- **WebCenter Portal Impersonation:** Lets you assign the right for someone else to impersonate you and lets you impersonate a user for whom you have been given impersonation rights. For example, impersonation might be useful if a customer support representative needs to perform actions on your behalf to understand

issues you are experiencing, a system administrator might need to perform operations on your behalf, or you might be delegated someone else's responsibilities while they are away. For more information, see [Chapter 7, "Using WebCenter Portal Impersonation."](#)

For instructions on how to show these pages in the Home portal, see [Section 9.7, "Showing or Hiding Pages in Your View of the Home Portal."](#)

8.4 What You Can Do In the Home Portal

You can perform the following actions in the Home portal:

- Create personal pages. For information, see [Chapter 9, "Creating and Managing Personal Pages."](#)
- Manage your contacts, connect with them through instant messaging and email, and collaborate with other WebCenter Portal users. For more information, see the chapters in [Part III, "Connecting and Collaborating with Other Users."](#)
- Create and manage documents, collaborate with others on documents, and publish content. For more information, see the chapters in [Part IV, "Working with Documents."](#)
- Use tools and services to notify you when things change, track activities, participate in polls, monitor RSS feeds, and view your worklists. For more information, see the chapters in [Part V, "Staying Informed."](#)
- Use tools and services to manage your schedule and work environment through calendars, notes, links, tags, and bookmarks. For more information, see the chapters in [Part VI, "Staying Organized."](#)

Tip: Some tools and services are active only in portals other than the Home portal, such as discussions, events, announcements, and lists.

Creating and Managing Personal Pages

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

This chapter includes the following topics:

- [Section 9.1, "About Personal Pages"](#)
- [Section 9.2, "Opening a Page in the Home Portal"](#)
- [Section 9.3, "Creating a Personal Page in the Home Portal"](#)
- [Section 9.4, "Managing Your Personal Pages"](#)
- [Section 9.5, "Editing a Personal Page"](#)
- [Section 9.6, "Setting Security for a Personal Page"](#)
- [Section 9.7, "Showing or Hiding Pages in Your View of the Home Portal"](#)
- [Section 9.8, "Rearranging Page Order in the Home Portal"](#)
- [Section 9.9, "Customizing Your View of a Page in the Home Portal"](#)
- [Section 9.10, "Resetting All of Your User Customizations from a Personal Page"](#)
- [Section 9.11, "Copying a Personal Page"](#)
- [Section 9.12, "Renaming a Personal Page"](#)
- [Section 9.13, "Sending Mail with a Link to a Personal Page"](#)
- [Section 9.14, "Viewing Information About a Personal Page"](#)
- [Section 9.15, "Deleting a Personal Page"](#)

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

9.1 About Personal Pages

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

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

By default, personal pages can be seen in the Home portal only by the user who created them, but users can also allow other users to see their personal pages (see [Section 9.6, "Setting Security for a Personal Page"](#)). While individuals are primarily responsible for managing the content of their personal pages, a system administrator has the authority to administer all personal pages in WebCenter Portal administration, as described in the "Managing Personal Pages" chapter in *Administering Oracle WebCenter Portal*.

Personal pages are functionally similar to *portal pages*, but their purpose is different: personal pages are for an individual user's use in the Home portal, whereas portal pages are created by a portal moderator for use by all members of a portal. For more information about the different types of *pages* in WebCenter Portal, see [Section 1.2.3, "What Are Pages?"](#)

9.2 Opening a Page in the Home Portal

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

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

To open a page in the Home portal:

- Click the page name in the Home portal navigation, such as tabs along the top.
- Enter the following URL in your browser:

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

See Also: "WebCenter Portal Pretty URLs" appendix in *Building Portals with Oracle WebCenter Portal*.

- Open the **Personalize Pages** page, and click the name of the page you want to open ([Figure 9–1](#)).



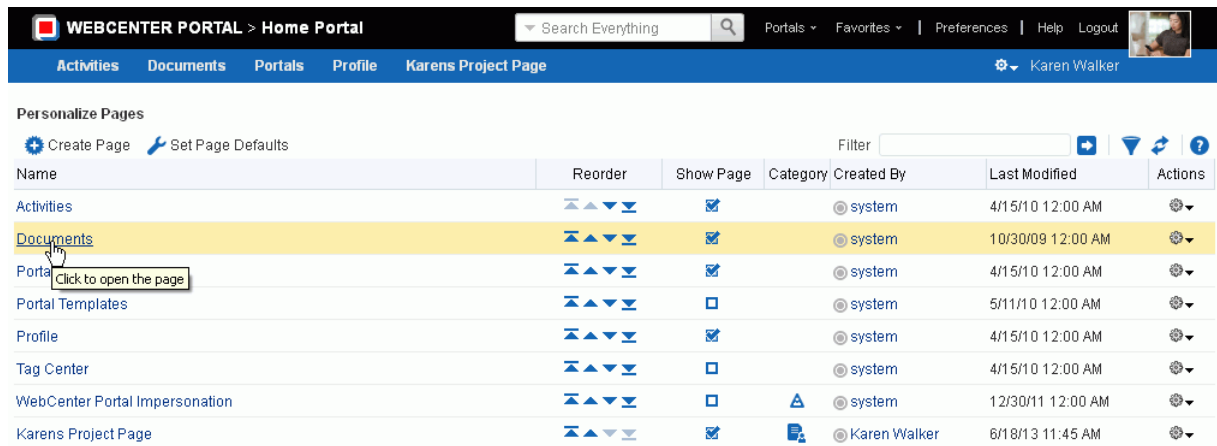
Tip: The way you access this page depends on the page template in use. For example, you may access it through an **Actions**   menu.

Figure 9–1 Personalize Pages: Opening a Page



9.3 Creating a Personal Page in the Home Portal

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

- [Section 9.3.1, "Setting Page Creation Defaults for Personal Pages"](#)
- [Section 9.3.2, "Creating a Personal Page"](#)


9.3.1 Setting Page Creation Defaults for Personal Pages

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

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

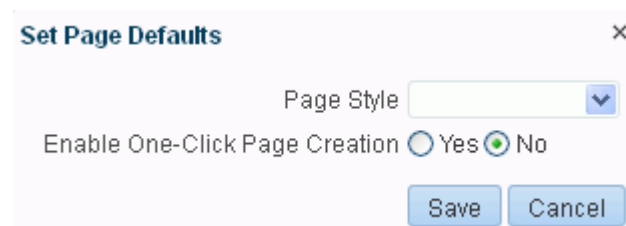
To set personal page creation defaults:

1. In the Home portal (see [Section 8.2, "Accessing the Home Portal"](#)), open the **Personalize Pages** page.

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

2. On the **Personalize Pages** page, click **Set Page Defaults** to open the Set Page Defaults dialog ([Figure 9–2](#)).

Figure 9–2 Set Page Defaults Dialog



3. To set page creation defaults:
 - a. Select a page layout from the **Page Style** dropdown list.

For detailed information about the seeded page styles, click the Help icon. Note, however, that your system administrator may provide additional custom page styles or restrict page styles to a shorter list.
 - b. Select an option next to **Enable One-Click Page Creation**:

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

Tip: When you bypass the Create Page dialog, your result is a page with a generic name. For information about renaming pages, see [Section 9.12, "Renaming a Personal Page."](#)

No—Display the Create Page dialog, with the specified **Page Style** selected as the default in the Create Page dialog for all of your personal pages. You can select a different style for your new personal pages.
4. Click **Save** to save your changes and exit the dialog.

9.3.2 Creating a Personal Page

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

To create a personal page in the Home portal:

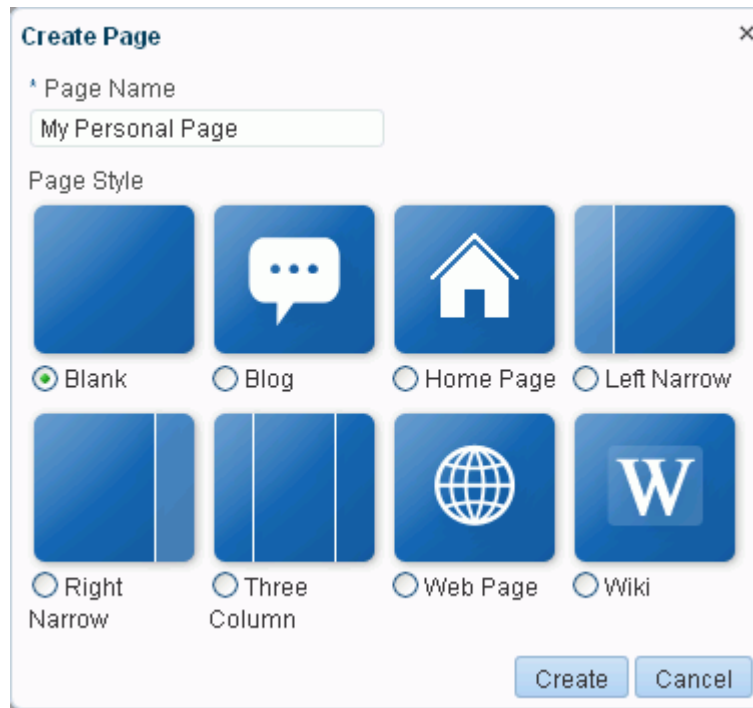
1. In the Home portal (see [Section 8.2, "Accessing the Home Portal"](#)), click **Create Page**.

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

WebCenter Portal will either:

- Open the Create Page dialog ([Figure 9-3](#)).
- Immediately create a new page with a default style, if specified in the Set Page Defaults dialog (see [Section 9.3.1, "Setting Page Creation Defaults for Personal Pages"](#)).

Figure 9-3 Create Page Dialog



Note: Your system administrator can control the options that appear in the Create Page dialog. So, your view may differ from that depicted in Figure 9-3. Additionally, the system administrator can set an attribute on a custom page style that determines whether a newly created page that is based on that style opens in page edit mode or page view mode.

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

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

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

? # & \ / * " | < > : ^

For example, if you create a wiki page named "what's In a Name?", the page will have this title, but the associated wiki document will be named _what's In a Name_.

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

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

4. Click **Create**.

The new page opens in page edit mode (Composer), where you can add content.

See Also: For information about editing personal pages in the Home portal, see [Section 9.5, "Editing a Personal Page."](#)

9.4 Managing Your Personal Pages

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

1. In the Home portal (see [Section 8.2, "Accessing the Home Portal"](#) [Section 8.2, "Accessing the Home Portal"](#)), open the **Personalize Pages** page ([Figure 9-4](#)).


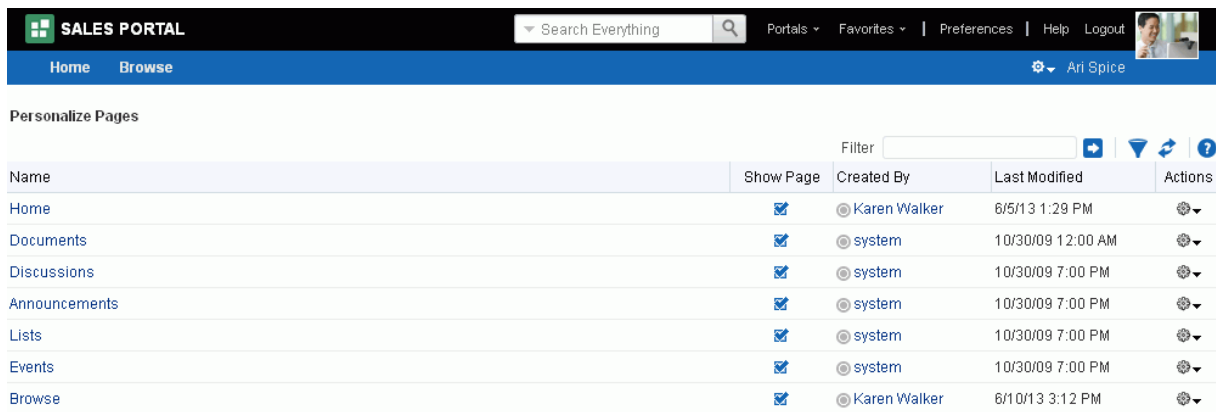
Tip: The way you access this page depends on the page template in use. For example, you may access it through an **Actions**  menu.

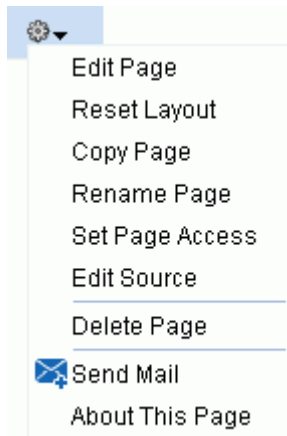
Figure 9-4 Personalize Pages Page



Name	Show Page	Created By	Last Modified	Actions
Home	<input checked="" type="checkbox"/>	Karen Walker	6/5/13 1:29 PM	
Documents	<input checked="" type="checkbox"/>	system	10/30/09 12:00 AM	
Discussions	<input checked="" type="checkbox"/>	system	10/30/09 7:00 PM	
Announcements	<input checked="" type="checkbox"/>	system	10/30/09 7:00 PM	
Lists	<input checked="" type="checkbox"/>	system	10/30/09 7:00 PM	
Events	<input checked="" type="checkbox"/>	system	10/30/09 7:00 PM	
Browse	<input checked="" type="checkbox"/>	Karen Walker	6/10/13 3:12 PM	

2. On the **Personalize Pages** page, select a page, then choose any of the actions available to you on the **Actions** menu for the page ([Figure 9-5](#)):

Figure 9-5 Personalize Pages: Page Actions Menu



- **Edit Page.** Open a page that you own or have privileges to edit in the page editor, Composer. See [Section 9.5, "Editing a Personal Page."](#)
- **Reset Layout.** Remove all of your user customizations from a selected page. This action removes such personal changes as rearrangement, resizing, or collapsing of components in only your view of the page. See [Section 9.10, "Resetting All of Your User Customizations from a Personal Page."](#)
- **Copy Page.** Make a personal copy of a page. See [Section 9.11, "Copying a Personal Page."](#)
- **Rename Page.** Rename a page that you own or have privileges to manage. See [Section 9.12, "Renaming a Personal Page."](#)
- **Set Page Access.** Add or remove access to a page by user name or role. See [Section 9.6, "Setting Security for a Personal Page."](#)
- **Delete Page.** Delete a page that you own or have privileges to manage. See [Section 9.15, "Deleting a Personal Page."](#)
- **Send Mail.** Send a link to a page that you own or have privileges to manage. See [Section 9.13, "Sending Mail with a Link to a Personal Page."](#)
- **About This Page.** View information about a page. See [Section 9.14, "Viewing Information About a Personal Page."](#)

9.5 Editing a Personal Page

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

To edit a personal page:

1. In the Home portal (see [Section 8.2, "Accessing the Home Portal"](#)), open the page in edit mode.

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

2. Edit the page as desired.

See Also: Editing a personal page is no different than editing a page in a portal. This is an advanced task, described in the "Editing a Page" section in *Building Portals with Oracle WebCenter Portal*.

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

9.6 Setting Security for a Personal Page

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

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

See Also: For information about how to show a hidden page, see [Section 9.7, "Showing or Hiding Pages in Your View of the Home Portal."](#)

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

You can grant or revoke access to your personal pages as described in the following sections:

- [Section 9.6.1, "Accessing Personal Page Security Using the Page Properties Dialog"](#)
- [Section 9.6.2, "Accessing Personal Page Security Using the Set Page Access Dialog"](#)
- [Section 9.6.3, "Setting Personal Page Security"](#)

9.6.1 Accessing Personal Page Security Using the Page Properties Dialog

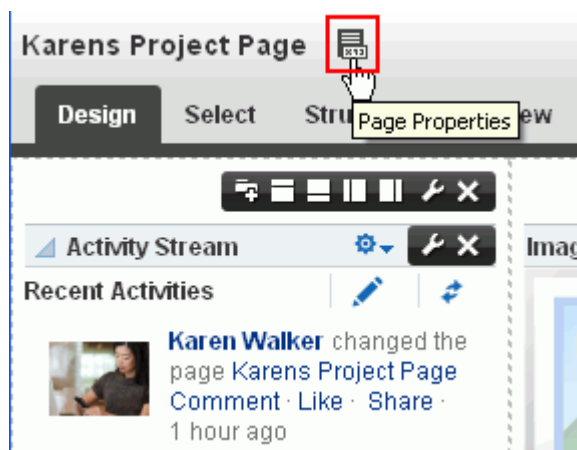
To access security settings for a personal page using the Page Properties dialog:

1. In the Home portal (see [Section 8.2, "Accessing the Home Portal"](#)), open the page in edit mode.

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

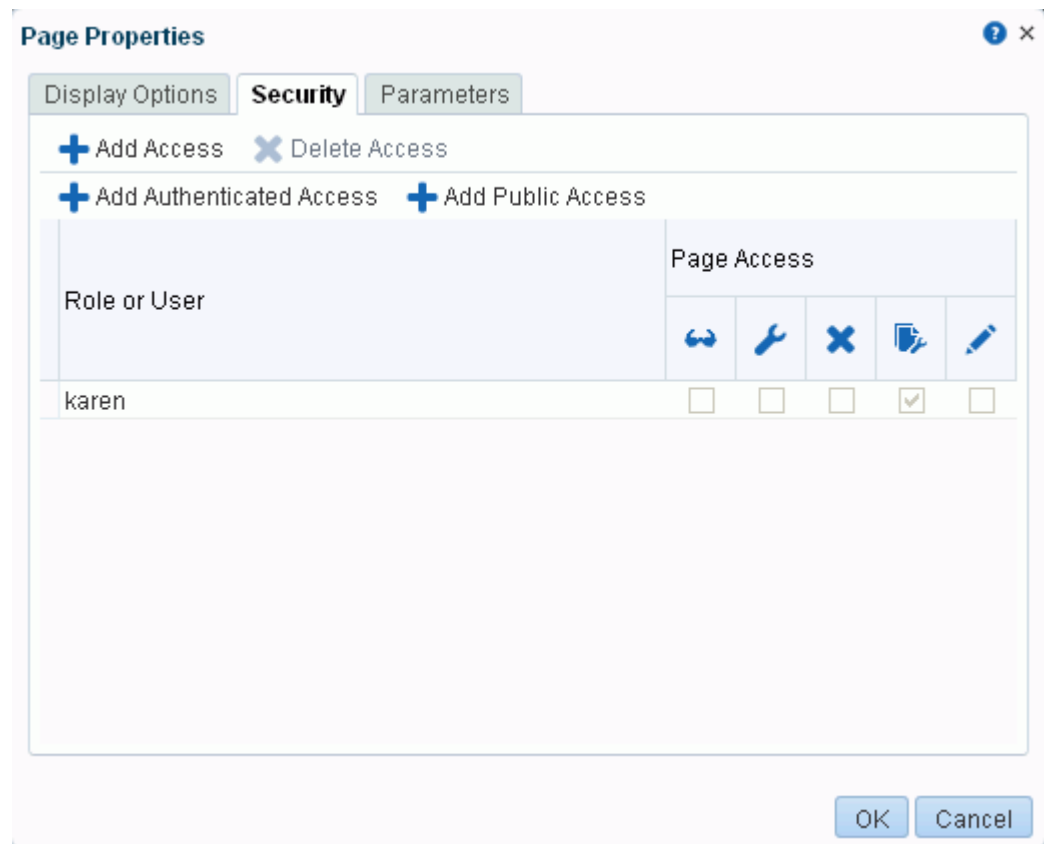
2. Click the **Page Properties** icon ([Figure 9–6](#)).

Figure 9–6 Page Properties Button in Page Edit Mode



3. In the Page Properties dialog, click the **Security** tab ([Figure 9–7](#)).

Figure 9–7 Personal Page: Security Tab in Page Properties Dialog



4. Follow the general steps for setting page access in [Section 9.6.3, "Setting Personal Page Security."](#)

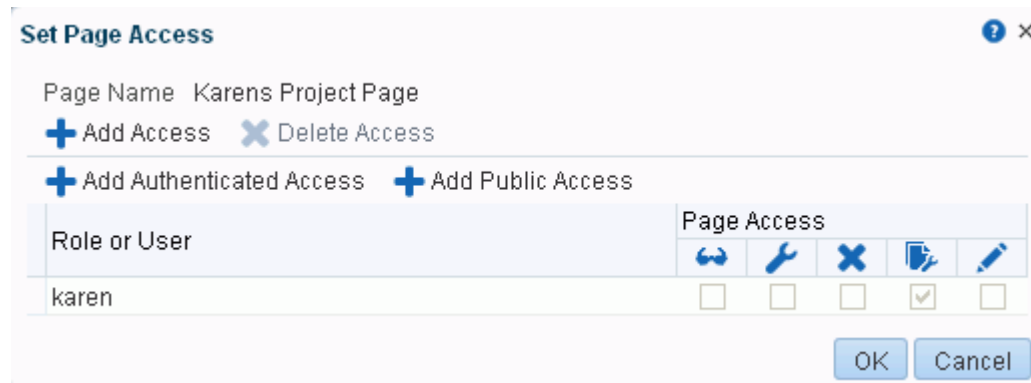
9.6.2 Accessing Personal Page Security Using the Set Page Access Dialog

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

1. In the Home portal (see [Section 8.2, "Accessing the Home Portal"](#)), open the **Personalize Pages** page.

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

2. On the **Personalize Pages** page, click the **Actions** icon for the page, and choose **Set Page Access** to open the Set Page Access dialog ([Figure 9–8](#)).

Figure 9–8 Set Page Access Dialog: Personal Page

3. Follow the general steps for setting page access in [Section 9.6.3, "Setting Personal Page Security."](#)

9.6.3 Setting Personal Page Security

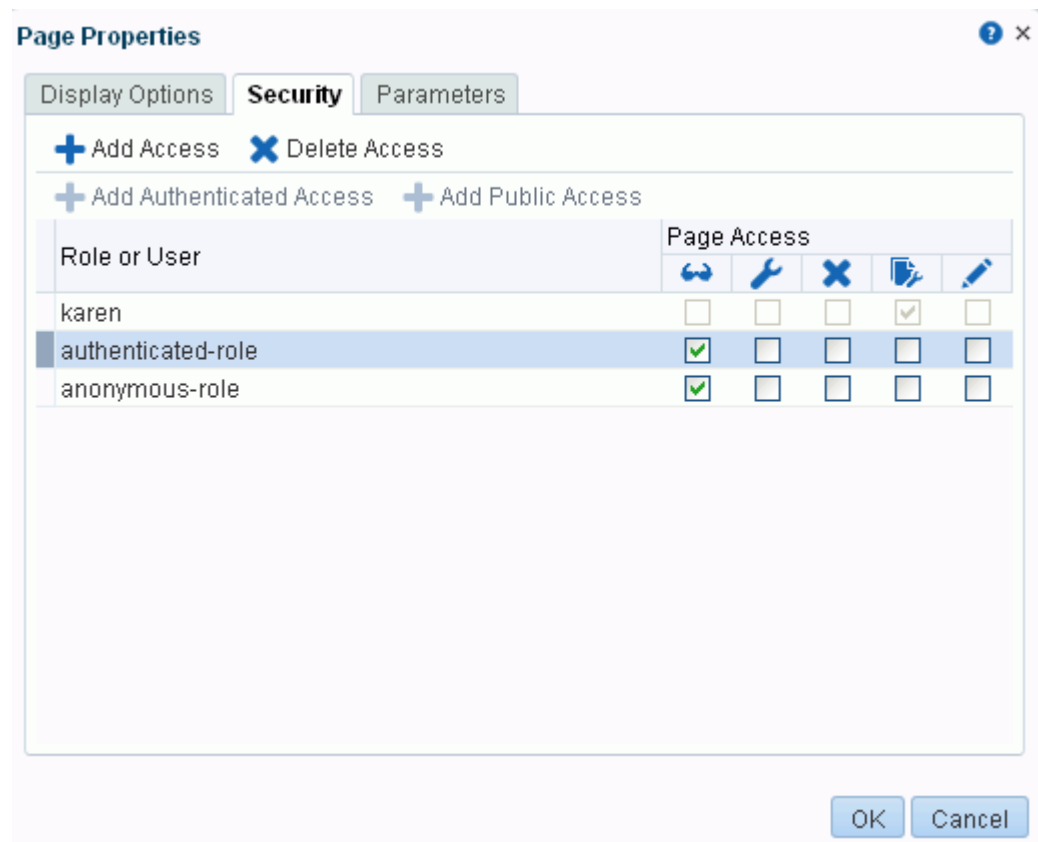
To set security on your personal page in either the Page Properties dialog or the Set Page Access dialog:

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

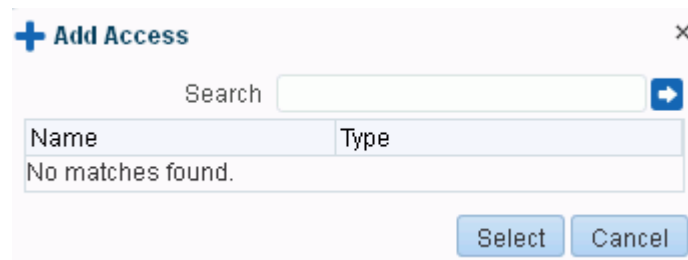
The role `authenticated-role` is added under **Role or User** with default **View** access to the page.

2. To grant page access permissions to all public users (that is, users who have not logged in to WebCenter Portal) click **Add Public Access**.

The role `anonymous-role` is added under **Role or User** with default **View** access to the page ([Figure 9–9](#)).

Figure 9–9 Authenticated and Public User Read Access to a Page

- To grant page access permissions to selected users and roles, click **Add Access** to open the Add Access dialog (Figure 9–10).

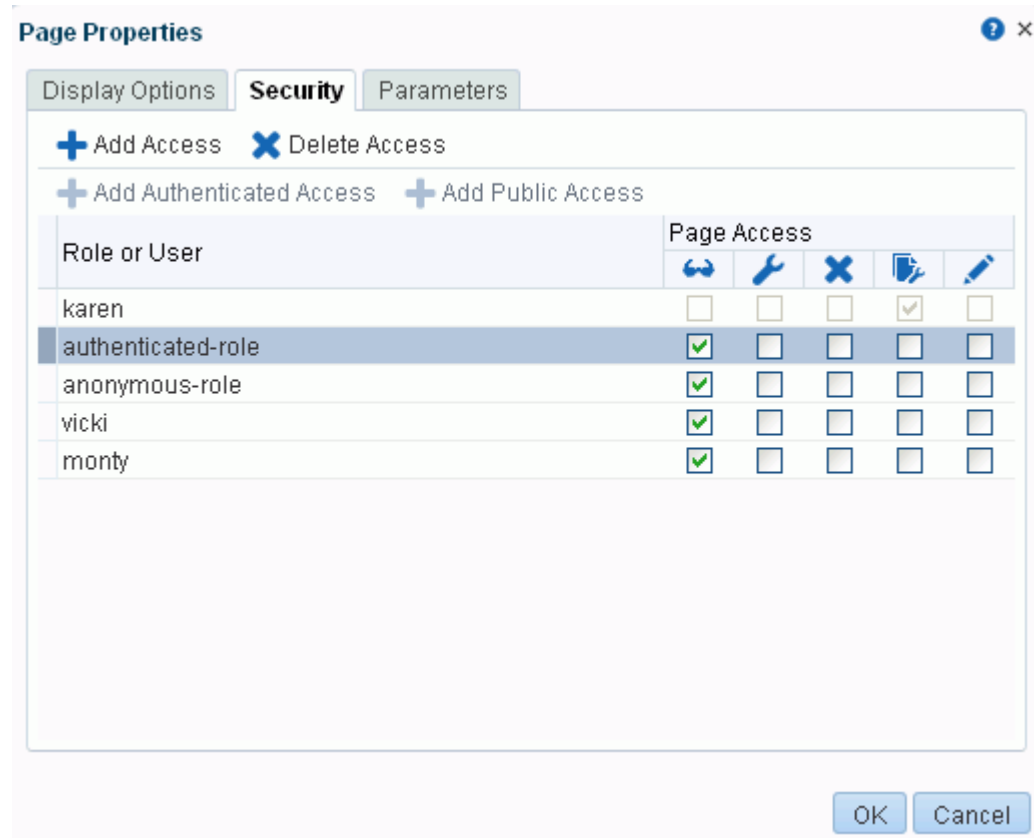
Figure 9–10 The Add Access Dialog

- In the **Search** field, enter a search term or the name of the user or role for whom you want to enable access, and click the **Search** icon. For tips on searching for a user in the identity store, see the "Searching for a User or Group in the Identity Store" section in *Building Portals with Oracle WebCenter Portal*.
- Select a user or role by clicking in its row.

Note: When you select a user name, the permissions you set are granted to that specific user. When you select a group or application role, the permissions you set are granted to all users who are members of that group or who are assigned that role.

- To make multiple selections:
- Ctrl+click to select multiple rows.
 - Shift+click to select a range of rows.
6. Click **Select** to close the Add Access dialog, and populate the **Role or User** list with the selected users, group, or roles (Figure 9–11).

Figure 9–11 Set Page Access Dialog






7. In the Set Page Access dialog, set the **Page Access** permissions as desired for each user or role (Table 9–1).

Table 9–1 Page Access Privileges in the Set Page Access Dialog

Page Access	Role or User Permissions
View Page	Access the page for viewing, but cannot perform any other actions on the page. Other permissions do not implicitly include this privilege
Edit Page	Edit the page using the page editor, Composer. This includes adding, rearranging, and deleting content; renaming the page; and changing page properties. This permission additionally requires the View Page permission.

Table 9–1 (Cont.) Page Access Privileges in the Set Page Access Dialog

Page Access	Role or User Permissions
 Delete Page	Delete the page. This permission additionally requires the View Page permission.
 Perform All Page Actions	Perform all actions on the page.
 Personalize Page	Adjust a user's own view of a page. This includes rearranging page content, collapsing and restoring page content, and removing page content. This permission additionally requires the View Page permission.

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


8. To prevent access to the page, select the user or role from which to revoke page access, and click **Delete Access**.
9. Click **OK** to save your changes.

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

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

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

1. In the Home portal (see [Section 8.2, "Accessing the Home Portal"](#)), open the **Personalize Pages** page.

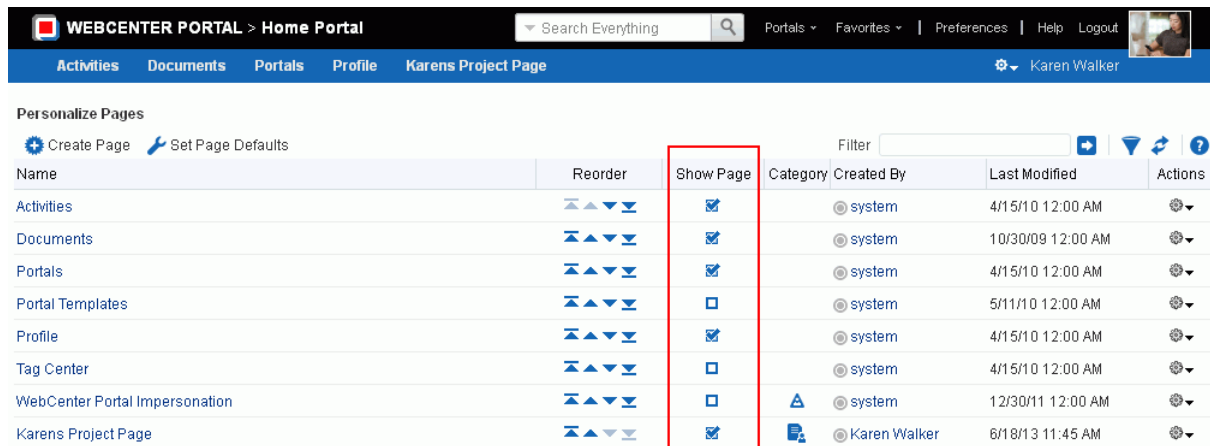
Tip: The way you access this page depends on the page template in use. For example, you may access it through an **Actions**  menu.

2. On the **Personalize Pages** page, select or deselect the **Show Page** check box for the pages you want to show or hide ([Figure 9–12](#)).

Note: If you deselect the **Show Page** check box for the current page, the **Personalize Pages** page closes and the current page is hidden.

Within the Home portal, one page must always be shown; therefore, you cannot hide all pages.

Figure 9–12 Personalize Pages: Show Page




9.8 Rearranging Page Order in the Home Portal

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

To rearrange page order in the Home portal:

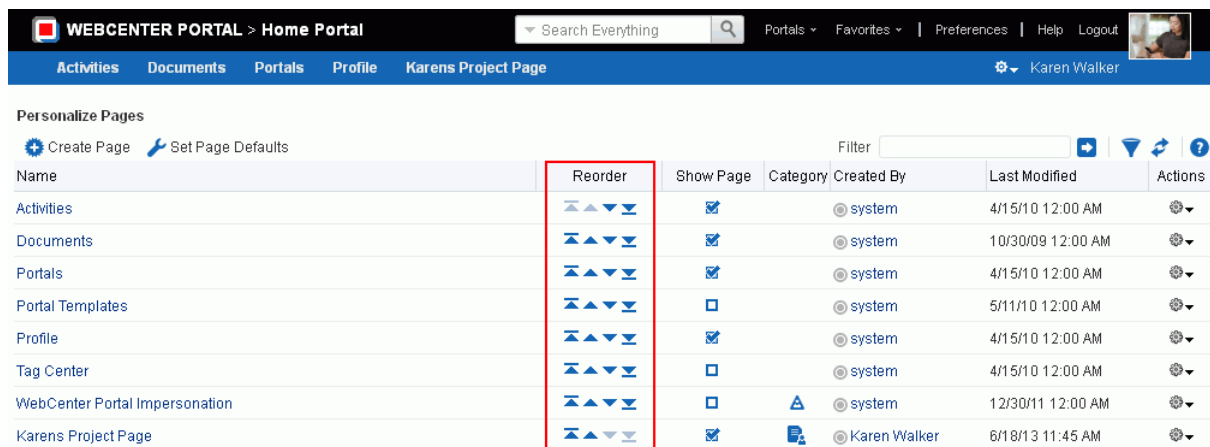
1. In the Home portal (see [Section 8.2, "Accessing the Home Portal"](#)), open the **Personalize Pages** page.

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

2. Use the icons in the **Reorder** column to rearrange page order ([Figure 9–13](#)).

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

Figure 9–13 Personalize Pages: Reorder



9.9 Customizing Your View of a Page in the Home Portal

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

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

- [Section 9.9.1, "About User Customizations on a Page"](#)
- [Section 9.9.2, "Rearranging Page Content"](#)
- [Section 9.9.3, "Removing Components from Your View of a Page"](#)
- [Section 9.9.4, "Resizing Components"](#)
- [Section 9.9.5, "Collapsing and Expanding Components"](#)

9.9.1 About User Customizations on a Page

You can customize the way pages appear in many ways without opening the page editor (Composer). For example, you can reposition, remove, resize, and collapse components, all within just your view of a page.

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

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

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

9.9.2 Rearranging Page Content

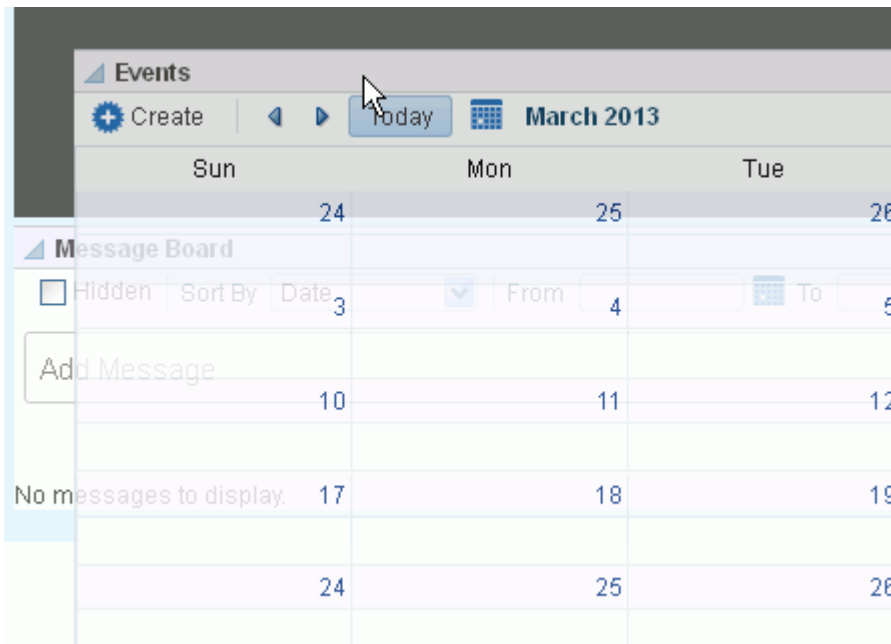
Use drag-and-drop to rearrange the position of a component on a page. Components moved by drag-and-drop can be moved into any open position on a page.

To rearrange components by dragging and dropping on a page:

- Click and hold the header of the component you want rearrange, drag it to its target position, and drop it onto the page.

A shadow indicates where the component is placed when you drop it ([Figure 9-14](#)).

Figure 9–14 Dragging an Issues List Above an Events Viewer



9.9.3 Removing Components from Your View of a Page

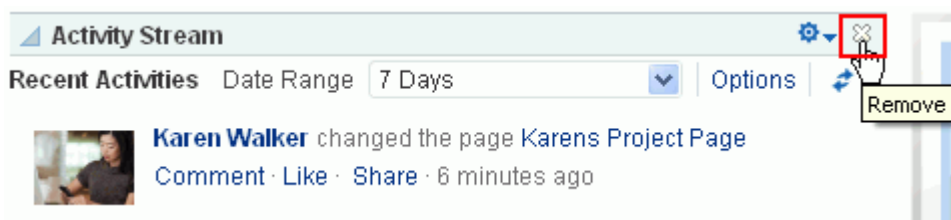
If you find that a component, such as a document viewer or portlet, is not useful to you and the component displays a **Remove** icon, you can remove it from your view of the page.

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

To remove a component from your view of a page:

- Click the **Remove** icon on the component header (see [Figure 9–15](#)).

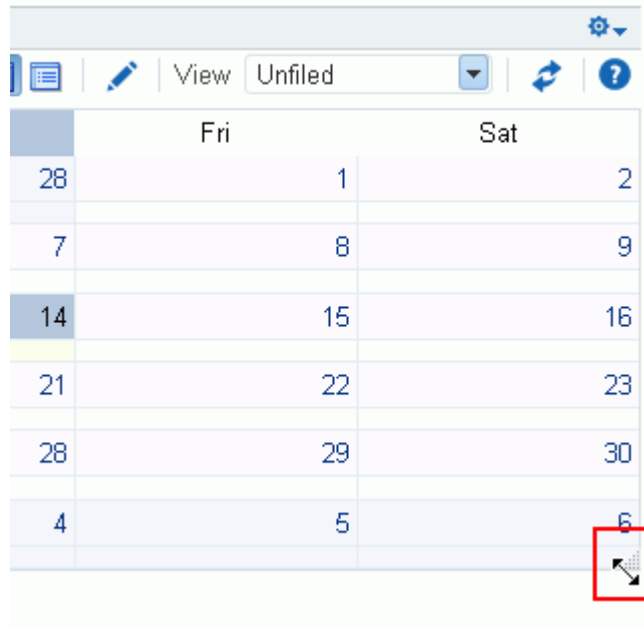
Figure 9–15 Remove Icon on a Component



The component is removed from your view of the page.

9.9.4 Resizing Components

The border and header surrounding a component is also known as *chrome*. Chrome can clarify the boundaries of the component and provide an access point for component actions, such as those on the **Actions** menu and those embedded in the chrome itself. In the latter case, the chrome may include a **Resize** handle that you can use to increase or decrease the height of the component ([Figure 9–16](#)).

Figure 9–16 *Resize Handle on a Component*

Note: The position of the resize handle differs for bidirectionally displayed components. Those components displayed in a right-to-left orientation display the resize handle on the left side.

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

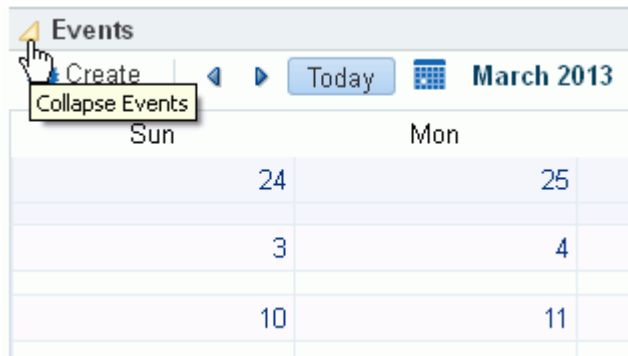
9.9.5 Collapsing and Expanding Components

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

To collapse and expand components on a page:

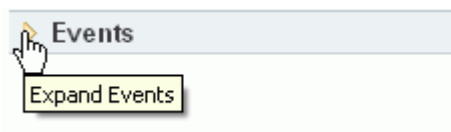
1. Click the **Collapse** icon on the component header to roll the component up like a window shade (Figure 9–17).

Figure 9–17 Collapse/Expand Icon on a Component



2. Click the **Expand** icon on the component header to restore the full component to view (Figure 9–18).

Figure 9–18 Collapsed Component




9.10 Resetting All of Your User Customizations from a Personal Page

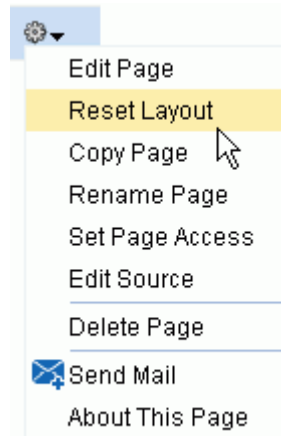
You can change your view of a page in many ways, including rearranging your view of page content, hiding components, and changing your page layout, as described in [Section 9.9, "Customizing Your View of a Page in the Home Portal."](#)

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

1. In the Home portal (see [Section 8.2, "Accessing the Home Portal"](#)), open the **Personalize Pages** page.

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

2. On the **Personalize Pages** page, click the **Actions** icon for the page, and choose **Reset Layout** (Figure 9–19) to open the Reset Layout dialog.

Figure 9–19 Page Actions: Reset Layout

3. To confirm your intent to remove all of your user customizations from the page, click **Reset**.


9.11 Copying a Personal Page

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

Note that a copy does *not* also include the original page's access settings. You must set access on the copy as a new page (see [Section 9.6, "Setting Security for a Personal Page"](#)).

To copy a personal page:

1. In the Home portal (see [Section 8.2, "Accessing the Home Portal"](#)), open the **Personalize Pages** page.

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


2. On the **Personalize Pages** page, click the **Actions** icon for the page, and choose **Copy Page** to open the Copy Page dialog.
3. Enter a name for the page copy in the **Page Name** field, and click **OK**.
The copied page opens in page edit mode (Composer).
4. Edit the copy as desired than click the **Save** icon to exit Composer.

9.12 Renaming a Personal Page

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

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

1. In the Home portal (see [Section 8.2, "Accessing the Home Portal"](#)), open the **Personalize Pages** page.

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


2. On the **Personalize Pages** page, click the **Actions** icon for the page, and choose **Rename Page** to open the Rename Page dialog.
3. Enter a new name for the page, and click the **Save** icon.

9.13 Sending Mail with a Link to a Personal Page

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

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

1. In the Home portal (see [Section 8.2, "Accessing the Home Portal"](#)), open the **Personalize Pages** page.


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

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

9.14 Viewing Information About a Personal Page

To view information about a personal page:

1. In the Home portal (see [Section 8.2, "Accessing the Home Portal"](#)), open the **Personalize Pages** page.


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

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

9.15 Deleting a Personal Page

To delete a personal page:

1. In the Home portal (see [Section 8.2, "Accessing the Home Portal"](#)), open the **Personalize Pages** page.

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

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

Exploring Portals

This chapter describes what a portal is and how to perform the tasks available to any knowledge worker in an existing portal.

This chapter includes the following topics:

- [Section 10.1, "About Portals"](#)
- [Section 10.2, "What Does a Portal Look Like?"](#)
- [Section 10.3, "Interacting with Portals Before Logging In \(Public User\)"](#)
- [Section 10.4, "Viewing and Accessing Available Portals"](#)
- [Section 10.5, "Sending Mail to Portal Members or Moderators"](#)
- [Section 10.6, "Viewing Information About a Portal"](#)
- [Section 10.7, "Viewing Portals Similar to the Current Portal"](#)
- [Section 10.8, "Publishing the Link to a Portal"](#)
- [Section 10.9, "Searching for a Portal"](#)
- [Section 10.10, "Joining a Portal"](#)
- [Section 10.11, "Searching in a Portal"](#)
- [Section 10.12, "Working with Pages in a Portal"](#)
- [Section 10.13, "Changing Your Role in a Portal"](#)
- [Section 10.14, "Cancelling Your Portal Membership"](#)

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

10.1 About Portals

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

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

10.2 What Does a Portal Look Like?

A newly created portal may look similar to [Figure 10-1](#) (side navigation) or [Figure 10-2](#) (top tabbed navigation). It is important to realize, however, that your system administrator or the portal moderator has most likely created and applied a custom page template to expose or hide tabs, features, and display a unique look and feel for your organization. A new portal that you create may look nothing like these examples.

Figure 10-1 Home Page of a New Portal Using a Side Navigation Page Template

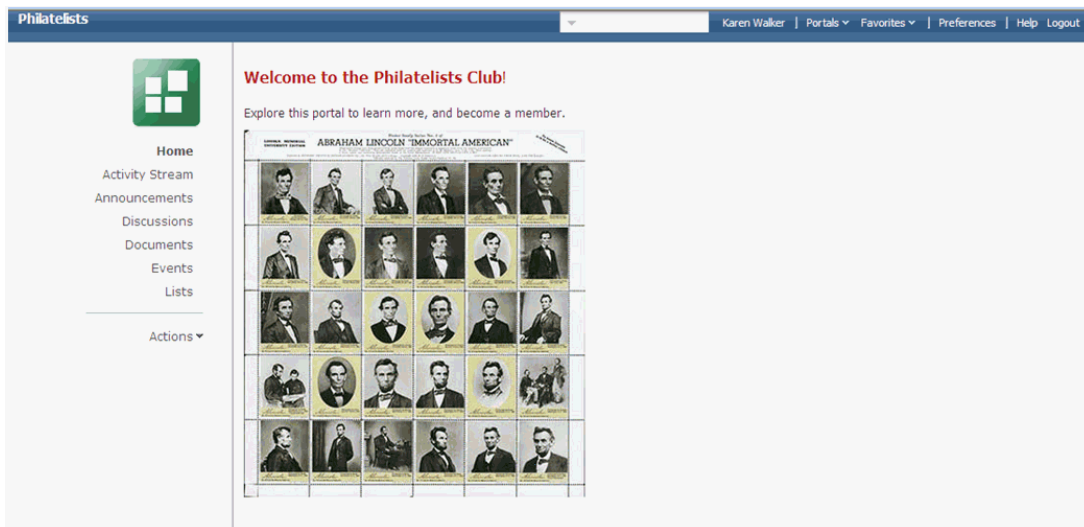
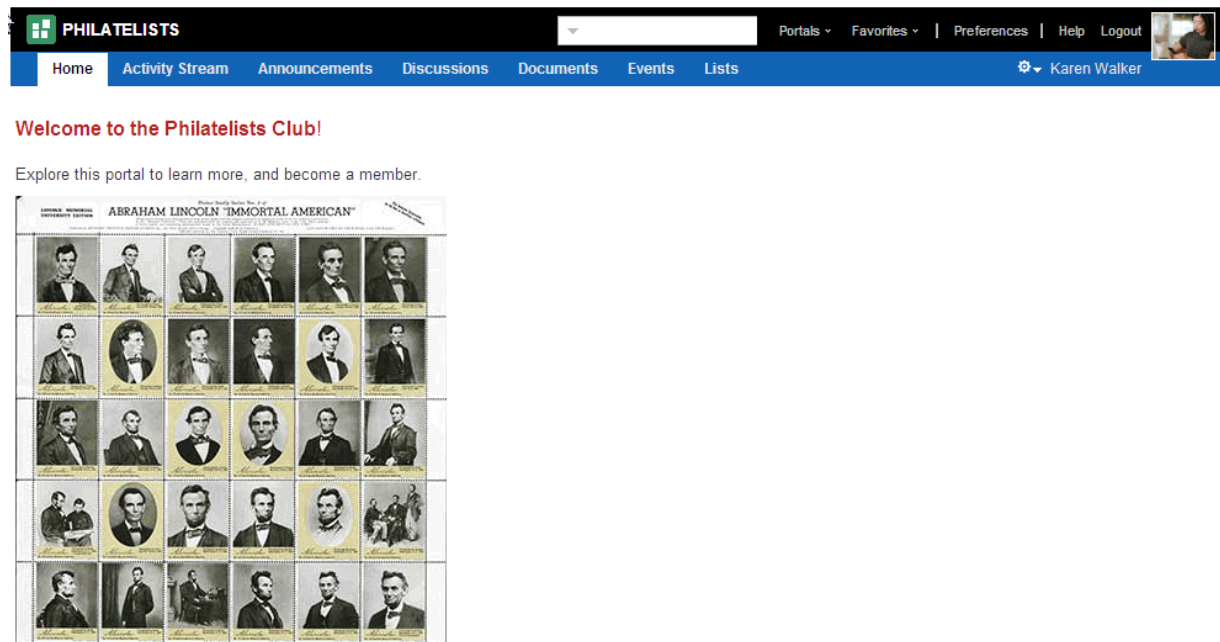


Figure 10–2 Home Page of a New Portal Using a Top Navigation Page Template



Each page in a portal provides access to related information. In the example portal under development above, the **Home** page welcome potential new member to the Philatelists club, the **Documents** page lists folders and files associated with the Philatelists club, the **Discussions** page provides a view of ongoing discussions with discussion forum management features, and so on. The portal moderator (or any portal member with the Portals-Manage Configuration permission) uses the pages available through the portal administration settings to build and manage the portal, expanding and customizing it as needs change and grow.

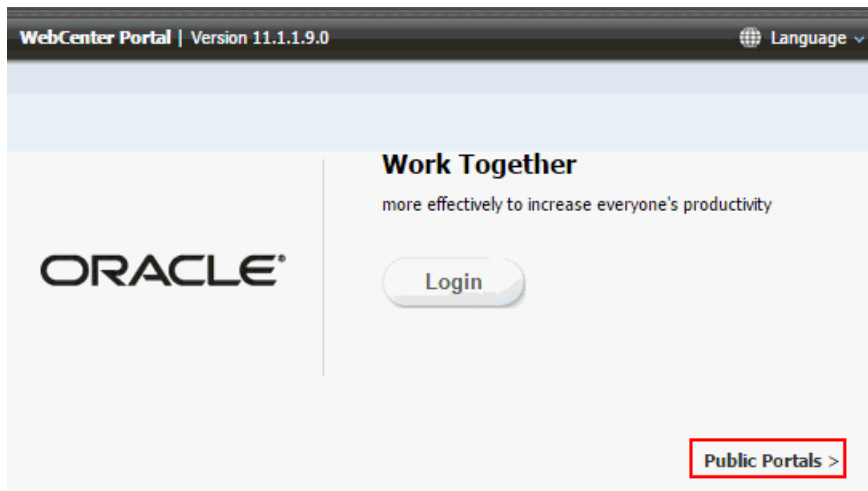
10.3 Interacting with Portals Before Logging In (Public User)

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

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

- Directly, using the portal URL provided to them.
- From the WebCenter Portal Welcome page, if their installation is configured to display this page, exposing a link to public portals (Figure 10–3).

Figure 10–3 Public Portals Link on Welcome Page



When a portal is made public, public users can view pages, lists, events, links and notes. To view Announcements, discussions, and documents, the portal moderator must explicitly grant these permissions. The public permissions granted by the portal moderator override the public permissions set by the system administrator at the application level.

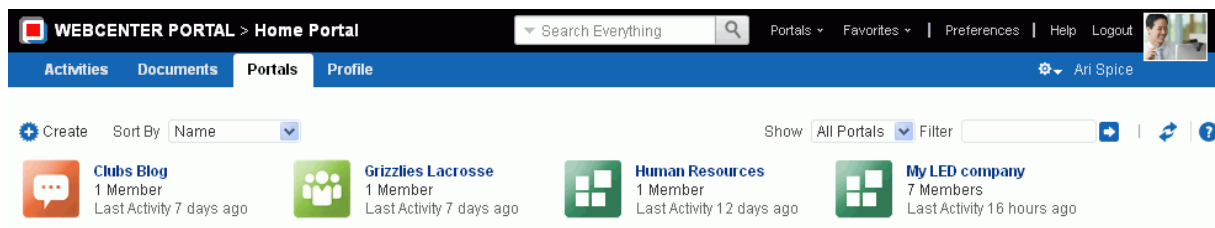
10.4 Viewing and Accessing Available Portals

You can participate in multiple portals and manage your portal memberships on the **Portals** page in the Home portal.

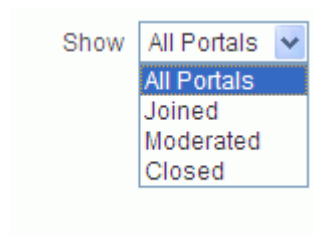
To view and access the portals that are available to you:

1. Open the **Portals** page (Figure 10–4) in either of the following ways:
 - In the Home portal, click the **Portals** tab.
 - From the **Portals** menu, select **Browse Portals**.

Figure 10–4 Portal Browser



2. On the **Portals** page, from the **Show** list, select:
 - **All Portals** (Figure 10–5) to show all portals that are available to you, both public and private. Portals defined as *hidden* when created are not shown.

Figure 10–5 Showing All Portals

- **Joined** to display portals of which you are a member.
 - **Moderated** to display portals for which you have moderator privileges.
 - **Closed** to display portals available to you that have been closed by the portal moderator. The content of a closed portal remains accessible and searchable to those who still want to reference it and portal members can continue working in the portal either by selecting **Closed Portals** as described here, or by direct URL (`http://host:port/webcenter/portal/portalName`).
3. To list one or more specific portals, enter a full or partial search term in the **Filter** field, then click the **Filter** icon to refresh the list with all portals for which a match is found in the **Display Name**, **Description**, or **Search Keywords** (specified when the portal was created or on the **Overview** page in the administration settings for the portal).
 4. To clear the current search string and display all portals, click the **Clear Filter** icon.
 5. To refresh the list of portals, first ensure that any prior search is cleared (click the **Clear Filter** icon), then click the **Refresh** icon.
 6. To go to the Home page of a portal, click the portal name or icon.
 7. To display a menu of actions available on the portal, right-click a portal icon or name to explore the actions that are available to you, depending on your permissions in the portal (Figure 10–6, Figure 10–7, and Figure 10–8):

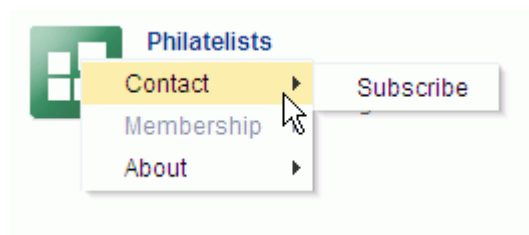
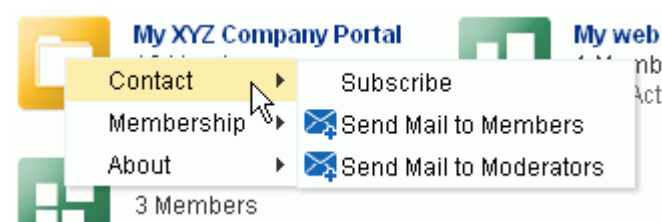
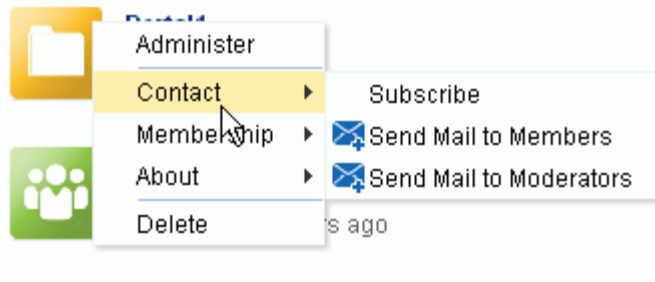
Figure 10–6 Portal Actions Menu for Non-Member**Figure 10–7 Portal Actions Menu for Portal Viewer or Participant**

Figure 10–8 Portal Actions Menu for Portal Moderator or Member with Manage Configuration Permission



Note: Portal administration selections (**Administer** and **Delete**) are shown only if you are the portal moderator or have *Manage Configuration* permission in the portal.

Select the available actions, depending on your permissions in the portal:

- **Administer** to open the portal administration settings pages, available only if you are the portal moderator or have *Manage Configuration* permission in the portal. See the "Administering a Portal" chapter in *Building Portals with Oracle WebCenter Portal*.
- **Contact** menu:
 - **Subscribe** to open the Subscribe dialog, where you can select notification messages that you want to receive whenever the listed actions occur within the scope of the portal. See [Section 22.3.2, "Setting Portal-Level Subscriptions."](#)
 - **Send Mail to Members** and **Send Mail to Moderators**. See [Section 10.5, "Sending Mail to Portal Members or Moderators."](#)
- **Membership** menu:
 - **Change Role** to change your role in the portal. See [Section 10.13, "Changing Your Role in a Portal."](#)
 - **Cancel Membership** to cancel your membership in the portal. See [Section 10.14, "Cancelling Your Portal Membership."](#)
- **About** menu:
 - **Portal** to view information about the portal. See [Section 10.6, "Viewing Information About a Portal."](#)
 - **Similar Portals** to view other portals similar to the current portal. A portal is considered similar to another portal if the same people perform similar actions in it, especially if they edit the content. For more information, see [Section 10.7, "Viewing Portals Similar to the Current Portal."](#)
 - **Share Link** to share the URL link to the portal with others. See [Section 10.8, "Publishing the Link to a Portal."](#)
- **Delete** to delete the portal, available only if you are the portal moderator or have *Manage Configuration* permission in the portal.

10.5 Sending Mail to Portal Members or Moderators

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

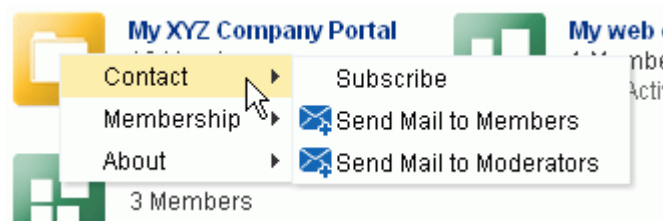
You can send mail to the members or the moderators of a portal using the default mail distribution list for the portal. Advanced users can customize the mail distribution lists for a portal, as described in the "Configuring the Mail Distribution List for a Portal" section in *Building Portals with Oracle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

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 send mail to members of a portal, see [Section 21.3.4.12, "Sending a Message."](#)

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

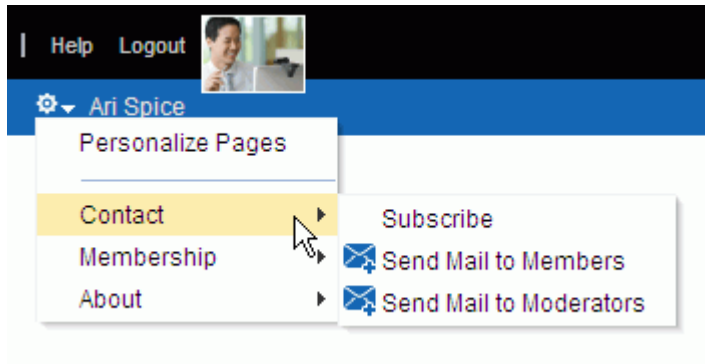
- From the **Portals** menu, select **Browse Portals** to display the **Portals** page in the Home portal. Locate the portal to which the members or moderators belong, then right-click the portal icon or name, and select **Contact**, then **Send Mail to Members** or **Send Mail to Moderators** (Figure 10-9).

Figure 10-9 Portal Actions Menu for Portal Viewer or Participant



- When viewing a portal, click the **Actions** menu, and select **Contact**, then **Send Mail to Members** or **Send Mail to Moderators**.

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

Figure 10–10 Portal Actions Menu: Viewing Portal

Your mail application opens, where you can compose and send mail to all members or moderators of the portal.

10.6 Viewing Information About a Portal

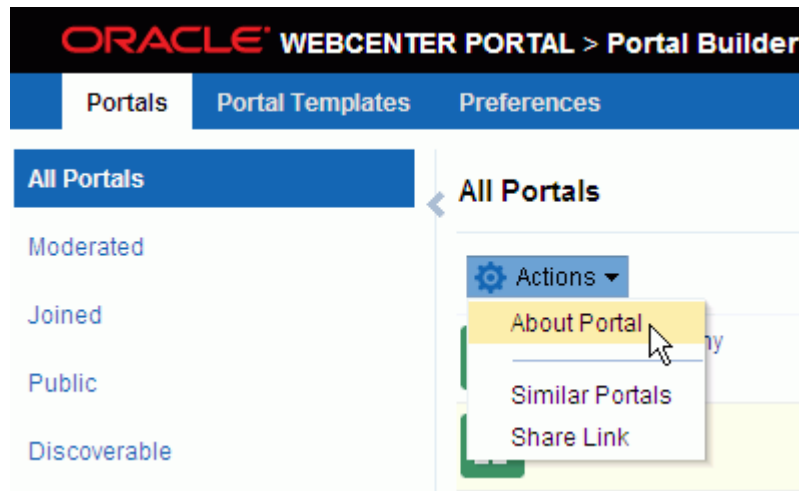
To view information about a portal:

1. Open the About Portal dialog 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 for which you want to view information, then right-click the portal icon or name, and select **About**, then Portal (Figure 10–11).

Figure 10–11 Portal Actions Menu for Portal Viewer or Participant

- From the **Portals** menu, select **Portal Builder** to display the **Portals** page in Portal Builder. Select the portal for which you want to view information, then click the **Actions** icon in the toolbar and select **About Portal**.

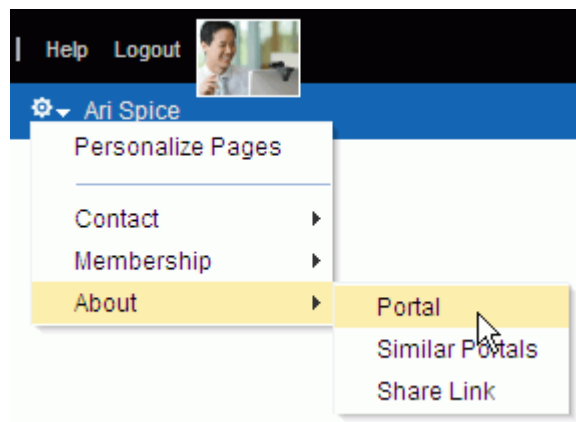
Figure 10–12 Portal Actions Menu: Portal Builder



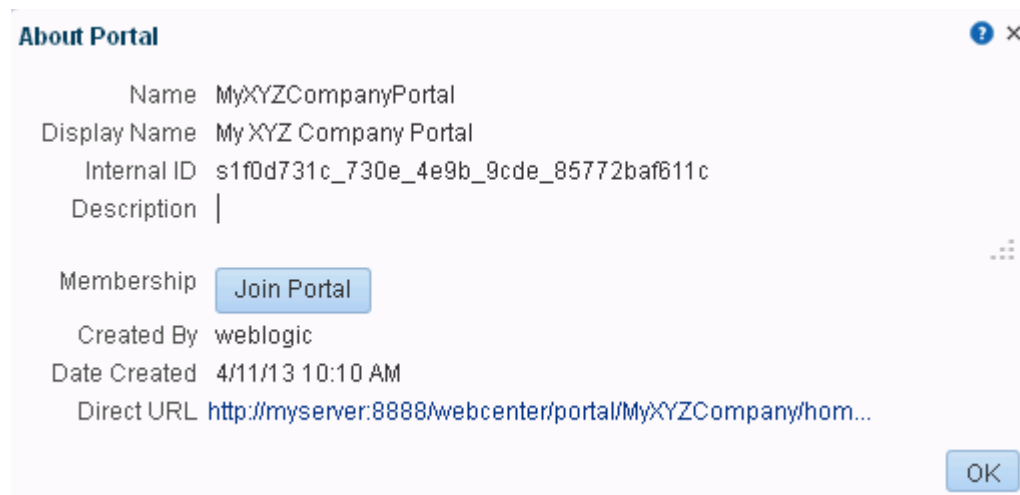
- When viewing a portal, click the **Actions** menu, and select **About**, then **Portal**.

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

Figure 10–13 Portal Actions Menu: Viewing Portal



2. Explore the information in the About Portal dialog (Figure 10–14):

Figure 10–14 About Portal Dialog

- **Name:** Internal name of the portal displayed in the portal URL.
- **Display Name:** Display name of the portal. This name displays at the top of the portal and other places where portals are available for selection, such as the **Portals** page.
- **Internal ID:** ID of the portal, which other applications may use to reference this portal.
- **Description:** A description of the portal, specified when creating the portal or in the portal administration settings.
- **Membership:** Your role in the portal. If you are not a member of this portal and the portal allows self-service membership, a **Join Portal** button displays here. See [Section 10.10, "Joining a Portal."](#)
- **Created By:** User name of the portal creator.
- **Date Created:** Date and time that the portal was created.
- **Direct URL:** URL that provides direct access to the portal.

10.7 Viewing Portals Similar to the Current Portal

A portal is considered similar to another portal if the same people perform similar actions in it, especially if they edit the content.

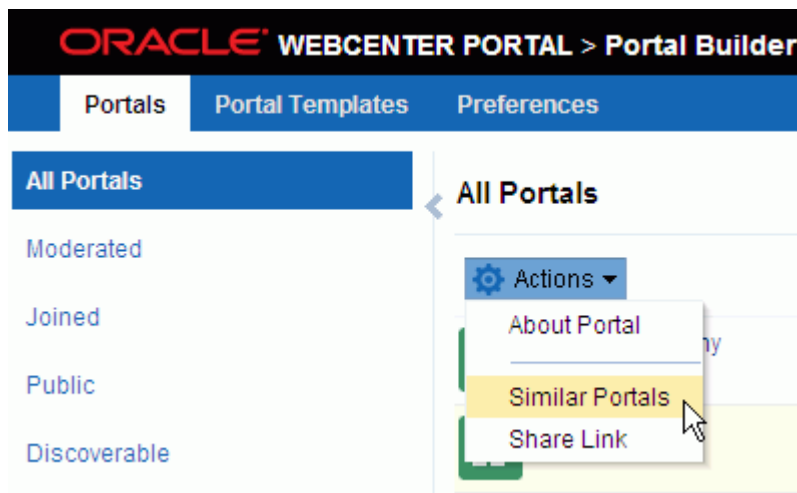
See Also: [Section 23.3, "Working with Similar Portals"](#)

To view a list of portals similar to the current portal:

1. Open the Similar Portals dialog 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 for which you want to view information, then right-click the portal icon or name, and select **About**, then **Similar Portals** ([Figure 10–15](#)).

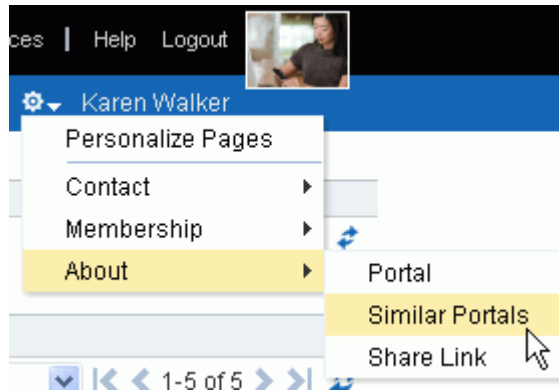
Figure 10–15 Portal Actions Menu for Portal Viewer or Participant

- From the **Portals** menu, select **Portal Builder** to display the **Portals** page in Portal Builder. Select the portal for which you want to view information, then click the **Actions** icon in the toolbar and select **Similar Portals**.

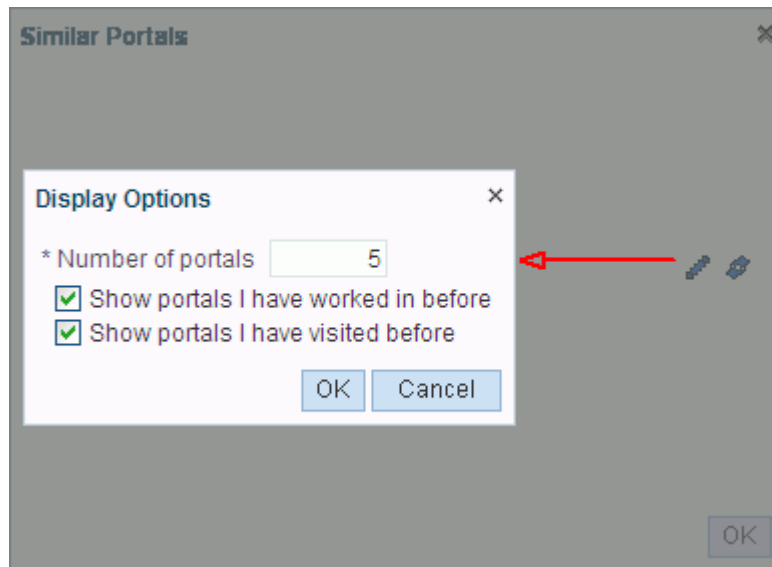
Figure 10–16 Portal Actions Menu: Portal Builder

- When viewing a portal, click the **Actions** menu, and select **About**, then **Similar Portals**.

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

Figure 10–17 Portal Actions Menu: Viewing Portal

2. In the Similar Portals dialog, select a portal to open, or click the **Display Options** (pencil) icon (Figure 10–18) to modify the criteria for similar portals.

Figure 10–18 Similar Portals Display Options Dialog

3. In the Display Options dialog (Figure 10–18), enter the number of portals to display and the display criteria, then click **OK**.

10.8 Publishing the Link to a Portal

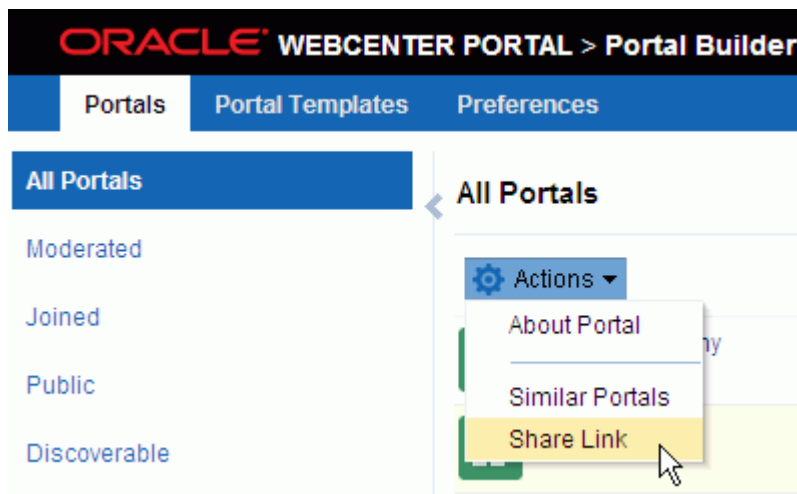
If you want to share a portal with others, you can publish a link to the portal that will appear in activity streams of other users. With appropriate permissions, users can directly access a portal by clicking the link that specifies the portal display name.

To publish the direct link to a portal:

1. Open the Share Link dialog in any of the following ways:
 - From the **Portals** menu, select **Browse Portals** to display the **Portals** page in the Home portal. Locate the portal for which you want to publish the link, then right-click the portal icon or name, and select **About**, then **Share Link** (Figure 10–19).

Figure 10–19 Portal Actions Menu for Portal Viewer or Participant

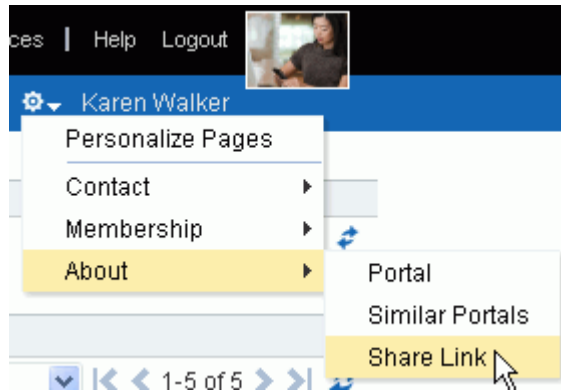
- From the **Portals** menu, select **Portal Builder** to display the **Portals** page in Portal Builder. Select the portal for which you want to view information, then click the **Actions** icon in the toolbar and select **Share Link**.

Figure 10–20 Portal Actions Menu: Portal Builder

- When viewing a portal, click the **Actions** menu, and select **About**, then **Share Link**.

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

Figure 10–21 Portal Actions Menu: Viewing Portal



2. In the Share dialog (Figure 10–22), optionally enter a comment to appear with the link.

Figure 10–22 Share Dialog for a Portal



3. In the **Share with** list, select who you want to share the link with:
 - **Everyone** to share the link with all members of the current portal in their activity streams. This is useful to notify members of updates to the portal.
 - **Portals** to open the Select a Portal dialog, where you can select a portal to share the link in the activity streams of all members of the selected portal. This is useful for sharing information with members of other portals who may be interested in your portal.
4. Click **Publish**.

10.9 Searching for a Portal

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

1. On the **Portals** page (see Section 10.4, "Viewing and Accessing Available Portals"), enter a search string in the **Filter** field.
2. Click the **Filter** icon (Figure 10–23).

Figure 10–23 Filter Icon

The **Portals** page displays portals where the search string is found in the portal name, description, or keywords.

3. To clear the current search string and display all portals, click the **Clear Filter** icon (Figure 10–24).

Figure 10–24 Clear Filter Icon

10.10 Joining a Portal

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

This section includes the following subsections:

- [Section 10.10.1, "Joining a Portal \(Registered WebCenter Portal User\)"](#)
- [Section 10.10.2, "Joining a Portal \(Unregistered WebCenter Portal User\)"](#)

10.10.1 Joining a Portal (Registered WebCenter Portal User)

To become a member of a portal, you can join the portal. If a portal is configured to allow self-service membership, you can request membership to the portal. Or, you may receive an invitation to join a portal.

Some membership requests require approval from the portal moderator so you may not gain access immediately. You will receive a Worklist notification when your membership is approved.

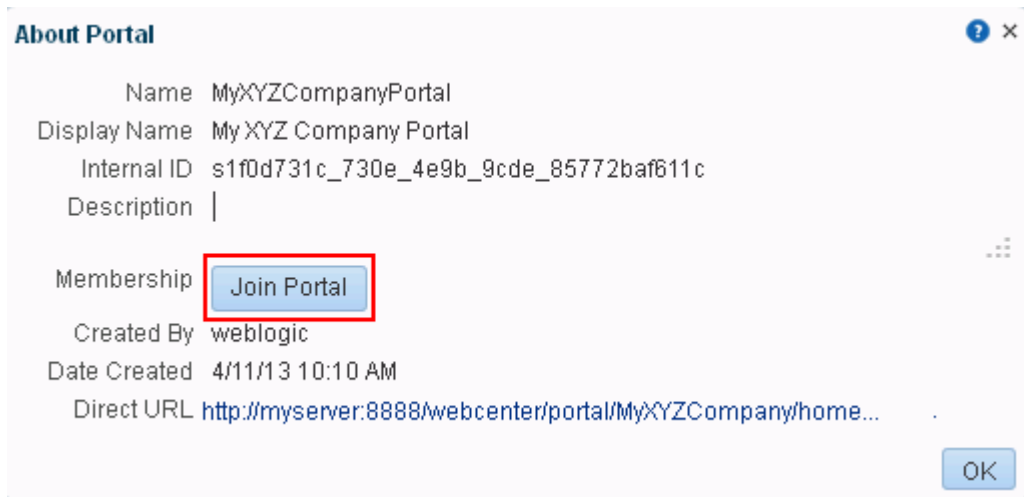
To join a portal:

1. On the **Portals** page (see [Section 10.4, "Viewing and Accessing Available Portals"](#)), from the **Show** menu, select **All Portals**.
2. To join a portal, you may have several options available to you, depending on the page template in use. For example, you may be able to simply click a portal to open the Request Membership dialog.

A generally available method to join a portal is through the About Portal dialog (see [Section 10.6, "Viewing Information About a Portal"](#)).

3. In the About Portal dialog, next to **Membership**, click **Join Portal** (Figure 10–25).

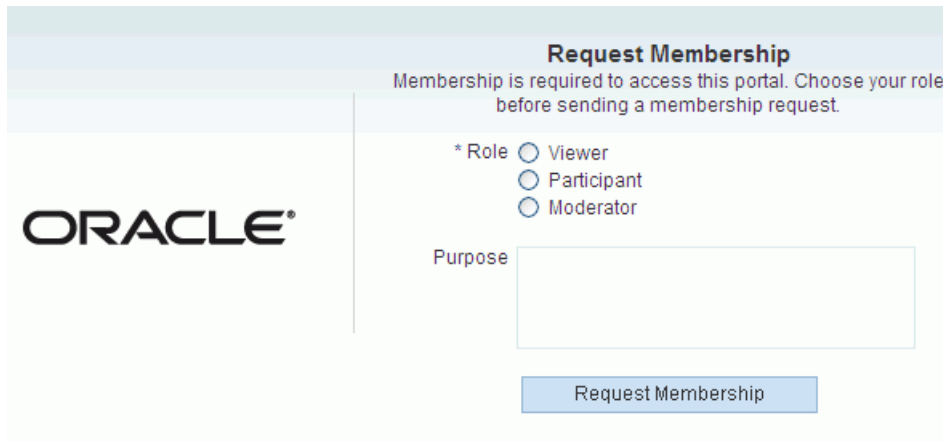
Figure 10–25 About Portal Dialog (for non-member)



Note: **Join Portal** is shown only if the portal allows self-service membership, as described in the "Managing Self-Service Membership for a Portal" section in *Building Portals with Oracle WebCenter Portal*. If **Join Portal** is not shown, contact the portal moderator directly to request membership.

A portal membership request page similar to [Figure 10–26](#) opens, showing the default Request Membership page. Because the portal moderator may customize this page, the page and roles you see may be different to the example shown here.

Figure 10–26 Requesting Portal Membership

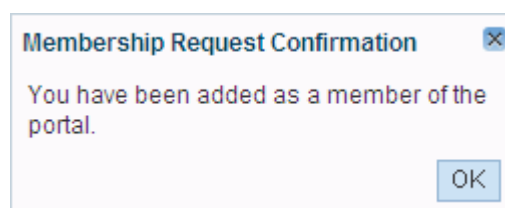


4. Select the type of **Role** you require in this portal.

Note: Out-of-the-box portal roles include *Viewer*, *Participant*, and *Moderator*, but a subset of these or other custom roles names may display, depending on what roles the portal moderator has defined for the portal.

5. (Optional) In the **Purpose** field, enter an explanation of why you need access to the portal with the role you have requested.
6. Click **Request Membership**.
You may see a confirmation message similar to [Figure 10–27](#), depending on whether or not the selected role requires moderator approval.

Figure 10–27 Confirmation Message (No Approval Required)



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

Note: If membership requests require approval, you do not gain access immediately. Check back later or monitor your Worklist—you will receive notification as soon as your membership is approved.

10.10.2 Joining a Portal (Unregistered WebCenter Portal User)

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

Some membership requests require approval from the portal moderator so you may not gain access immediately. You will receive a Worklist notification when your membership is approved.

1. In the mail message you receive inviting you to join a portal, click the **Register Yourself** link included in the invitation mail to open the Self-Registration page, similar to [Figure 10–28](#). Because the portal moderator may customize this page, the page you see may be different to the example shown here.

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

Figure 10–28 Registering with WebCenter Portal

Self-Registration

* Choose User Name

* Choose Password

* Re-enter Password

* First Name

* Last Name

* Email Address

2. Choose a suitable **User Name**. The user name restrictions depend on the underlying identity store that is configured with WebCenter Portal.
Click **Check User Name Available** to determine whether a WebCenter Portal user is registered with that name. Click **OK** to dismiss the confirmation message and, if necessary, enter a different name.
3. Enter a suitable **Password**, and then **Re-enter Password** for verification. The password restrictions depend on the underlying identity store that is configured with WebCenter Portal.
4. Enter your **First Name** and **Last Name**, and an **Email Address**.
5. Click **Register**.

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

10.11 Searching in a Portal

WebCenter Portal includes the **Search** field at the top of the application for global (application-wide) searches. To perform searches limited to a single portal, an application specialist or portal moderator must create a new resource catalog, add the Search task flow (component) from the library to the catalog, and then assign this catalog to the portal. The Search task flow is not available in the default resource catalog.

10.12 Working with Pages in a Portal

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

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

- [Section 10.12.1, "Showing or Hiding Pages in Your View of a Portal"](#)
- [Section 10.12.2, "Opening a Page in a Portal"](#)


- Section 10.12.3, "Customizing Your View of a Page in a Portal"
- Section 10.12.4, "Resetting All of Your User Customizations on a Page in a Portal"
- Section 10.12.5, "Exposing a Portal Page in Your View of the Home Portal"
- Section 10.12.6, "Sending Mail with a Link to a Page in a Portal"
- Section 10.12.7, "Creating, Editing, and Managing a Page in a Portal"

10.12.1 Showing or Hiding Pages in Your View of a Portal

By default, a portal exposes the pages that are part of the portal navigation. You may want to personalize your view of the portal to hide some pages, or expose system pages that are hidden by default, such as a page for a tool that is enabled in the portal, such as Announcements or Lists.

To show or hide pages in your view of a portal:

1. Open the **Personalize Pages** page.

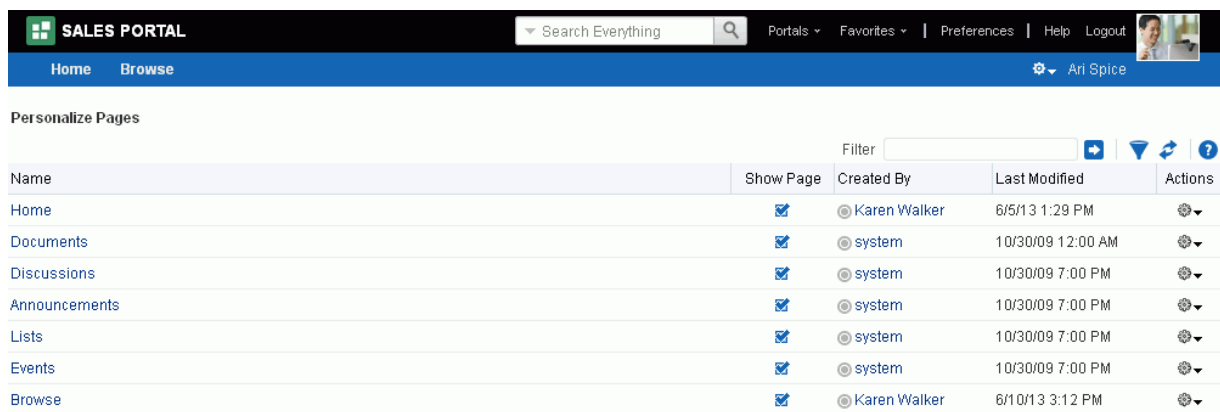
Tip: The way you access this page depends on the page template in use. For example, you may access it through an **Actions**  menu.

2. On the **Personalize Pages** page, select or deselect the **Show Page** check box for the pages you want to show or hide (Figure 10–29).

Note: If you deselect the **Show Page** check box for the current page, the **Personalize Pages** page closes and the current page is hidden.

Within the Home portal, one page must always be shown; therefore, you cannot use this method to hide all pages.

Figure 10–29 Personalize Pages for a Portal: Showing or Hiding a Page



Name	Show Page	Created By	Last Modified	Actions
Home	<input checked="" type="checkbox"/>	Karen Walker	6/5/13 1:29 PM	
Documents	<input checked="" type="checkbox"/>	system	10/30/09 12:00 AM	
Discussions	<input checked="" type="checkbox"/>	system	10/30/09 7:00 PM	
Announcements	<input checked="" type="checkbox"/>	system	10/30/09 7:00 PM	
Lists	<input checked="" type="checkbox"/>	system	10/30/09 7:00 PM	
Events	<input checked="" type="checkbox"/>	system	10/30/09 7:00 PM	
Browse	<input checked="" type="checkbox"/>	Karen Walker	6/10/13 3:12 PM	


10.12.2 Opening a Page in a Portal

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

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

You can open a page in a portal in any of the following ways:

- Click the page name in the portal navigation.
- Enter the following URL in your browser:
`http://host:port/webcenter/portal/portalName/page/pageName`
- Open the **Personalize Pages** page, and click the name of the page you want to open.

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

10.12.3 Customizing Your View of a Page in a Portal

You can change your view of a given page in a portal in many ways, including rearranging your view of page content, hiding components, and resizing components. All of these options are *user customizations*, that is, they affect only your view. All other portal members' views remain unchanged.

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

- [Section 10.12.3.1, "About User Customizations on a Page"](#)
- [Section 10.12.3.2, "Rearranging Page Content"](#)
- [Section 10.12.3.3, "Removing Components from Your View of a Page"](#)
- [Section 10.12.3.4, "Resizing Components"](#)
- [Section 10.12.3.5, "Collapsing and Expanding Components"](#)

10.12.3.1 About User Customizations on a Page

You can customize the way pages appear in many ways without opening the page editor (Composer). For example, you can reposition, remove, resize, and collapse components, all within just your view of a page.

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

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

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

10.12.3.2 Rearranging Page Content

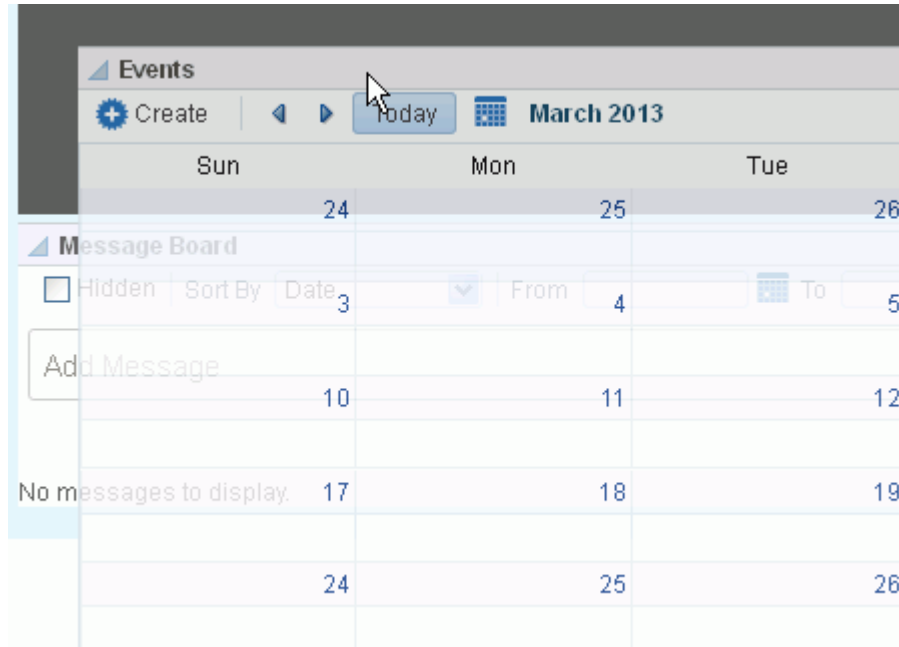
Use drag-and-drop to rearrange the position of a component on a page. Components moved by drag-and-drop can be moved into any open position on a page.

To rearrange components by dragging and dropping on a page:

- Click and hold the header of the component you want rearrange, drag it to its target position, and drop it onto the page.

A shadow indicates where the component is placed when you drop it (Figure 10–30).

Figure 10–30 Dragging an Events Calendar Above a Message Board



10.12.3.3 Removing Components from Your View of a Page

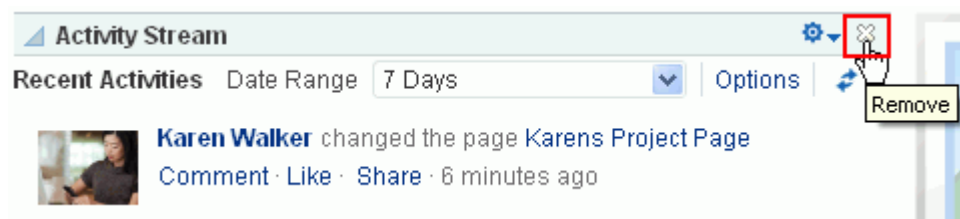
If you find that a component is not useful to you and the component displays a **Remove** icon, you can remove it from your view of the page.

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

To remove a component from your view of a page:

- Click the **Remove** icon on the component header (see Figure 10–31).

Figure 10–31 Remove Icon on a Component



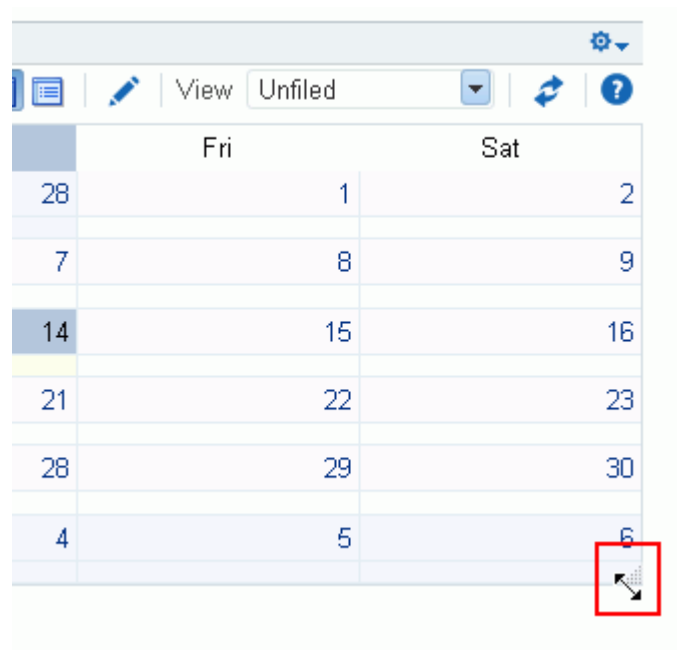
The component is removed from your view of the page.

10.12.3.4 Resizing Components

The border and header surrounding a component is also known as *chrome*. Chrome can clarify the boundaries of the component and provide an access point for component actions, such as those on the **Actions** menu and those embedded in the

chrome itself. In the latter case, the chrome may include a **Resize** handle that you can use to increase or decrease the height of the component (Figure 10–32).

Figure 10–32 *Resize Handle on a Component*



Note: The position of the resize handle differs for bidirectionally displayed components. Those components displayed in a right-to-left orientation display the resize handle on the left side.

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

10.12.3.5 Collapsing and Expanding Components

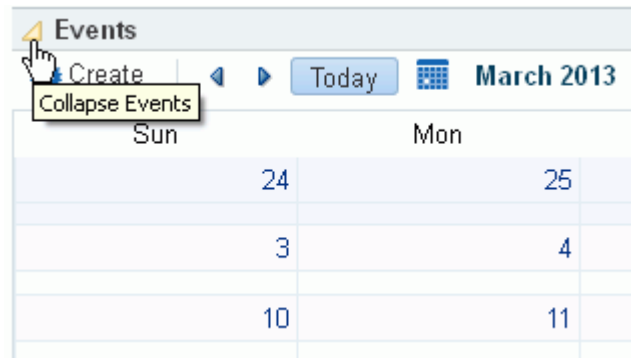
With one click, you can collapse some components so that they roll up like a window shade, useful for removing the visual noise of an unused component from your application view. Collapse is available when a component shows a header. With another click, you can expand a collapsed component.

Collapsing is useful for removing the visual noise of an unused component from your application view. Collapse is available when a component shows a header.

To collapse and expand components on a page:

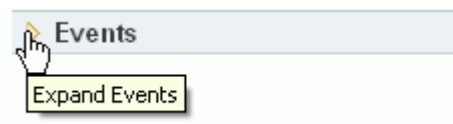
1. Click the **Collapse** icon on the component header to roll the component up like a window shade (Figure 10–33).

Figure 10–33 Collapse/Expand Icon on a Component



2. Click the **Expand** icon on the component header to restore the full component to view (Figure 10–34).

Figure 10–34 Collapsed Component




10.12.4 Resetting All of Your User Customizations on a Page in a Portal

You can change your personal view of a given page in a portal in many ways, including rearranging your view of page content, hiding components, and resizing components, as described in [Section 10.12.3, "Customizing Your View of a Page in a Portal."](#)

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

1. In the portal, display the **Personalize Pages** page.

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

2. On the **Personalize Pages** page, click the **Actions** icon for the page, and select **Reset Layout** to open the Reset Layout dialog.
3. To confirm your intent to remove all of your user customization from the page, click **Reset**.


10.12.5 Exposing a Portal Page in Your View of the Home Portal

You can make a portal page available for viewing and revising from your view of the Home portal according to your permissions on the page. The portal name is prepended to the page name, so the *Sales Results* page in the portal *Finance* becomes *Finance - Sales Results* in your view of the Home portal.

If you delete such a page from your view of the Home portal, it remains in its original portal. In other words, deleting it simply removes it from your view of the Home portal; it does not actually delete the page. If the page is deleted from its parent portal, it is unavailable in your view of the Home portal. To clear it from your view, you must refresh the page list in the Home portal's **Personalize Pages** page.

To add a portal page to the list of pages in the Home portal, visible only to you in your personalized view of the Home portal:

1. In the portal, open the **Personalize Pages** page.

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

2. On the **Personalize Pages** page, click the **Actions** icon for the page, and select **Add to Home Portal**.


When you add a portal page to your view of the Home portal, the page scope remains that of the portal.

10.12.6 Sending Mail with a Link to a Page in a Portal

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

To send mail to other portal members populated with a link to a page:

1. In the portal, display the **Personalize Pages** page.

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

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

10.12.7 Creating, Editing, and Managing a Page in a Portal

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

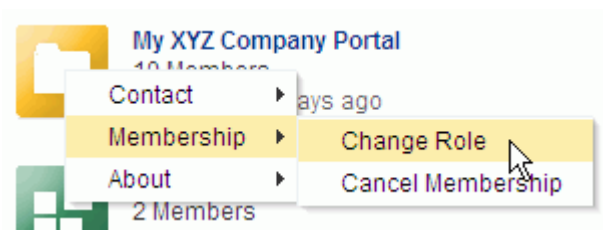
10.13 Changing Your Role in a Portal

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

Role change requests may or may not require approval, depending on how the portal moderator has defined membership changes for a particular role, as described in the "Managing Self-Service Membership for a Portal" section in *Building Portals with Oracle WebCenter Portal*. You will receive a Worklist notification when your new role is approved.

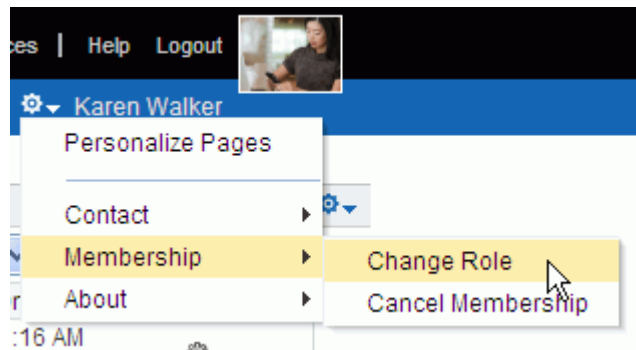
To change your portal role:

1. Open the Change Membership dialog in either of the following ways:
 - From the **Portals** menu, select **Browse Portals** to display the **Portals** page in the Home portal. Locate the portal in which you want to change your membership role, then right-click the portal icon or name, and select **Membership**, then **Change Role** (Figure 10-35).

Figure 10–35 Portal Actions Menu for Portal Viewer or Participant

- When viewing a portal, click the **Actions** menu, and select **Membership**, then **Change Role**.

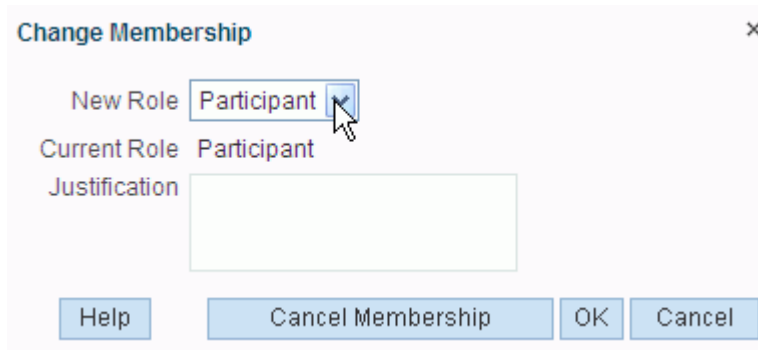
Note: The location of the **Actions** menu is dependent on the page template in use. For example, it may be an icon in the menu bar in a top navigation template.

Figure 10–36 Portal Actions Menu: Viewing Portal

2. In the Change Membership dialog (Figure 10–37), select your preferred role from the **New Role** list.

Note: The **New Role** list is active only if the portal moderator has allowed self-service membership changes. If **New Role** selections are disabled, contact the portal moderator directly to request a member role change.

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

Figure 10–37 Change Membership Dialog

The portal moderator controls the list of roles displayed here, as described in the "Managing Self-Service Membership for a Portal" section in *Building Portals with Oracle WebCenter Portal*. Out-of-the-box portal roles include *Viewer*, *Participant*, and *Moderator* but a subset of these or other custom roles may display.

3. Click **OK**.
A confirmation message displays whether or not the selected role change requires approval.
4. Click **OK** to acknowledge the confirmation message.
5. On the **Portals** page, click the **Refresh** icon to confirm your membership status has changed for the portal.

Note: Your new role is not effective immediately when membership change requests require approval. Check back later or monitor your Worklist; your new role will be effective as soon as the portal moderator approves it.

10.14 Cancelling Your Portal Membership

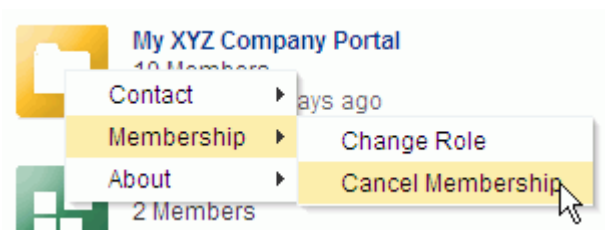
When you no longer want or need membership in a portal, you can cancel your membership.

Some cancellation requests require approval from the portal moderator so you may not be removed from the portal immediately. You will receive a Worklist notification when your membership is removed.

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

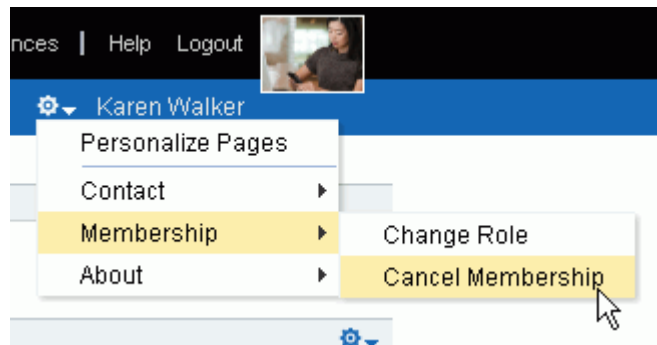
To cancel your membership in a portal:

1. Open the Cancel Membership dialog in either of the following ways:
 - From the **Portals** menu, select **Browse Portals** to display the **Portals** page in the Home portal. Locate the portal in which you want to change your membership role, then right-click the portal icon or name, and select **Membership**, then **Cancel Membership** (Figure 10–38).

Figure 10–38 Portal Actions Menu for Portal Viewer or Participant

- When viewing a portal, click the **Actions** menu, and select **Membership**, then **Change Role**.

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

Figure 10–39 Portal Actions Menu: Viewing Portal

2. Click **OK** to acknowledge the confirmation message.
3. From the **Portals** menu, select **Browse Portals**. In the portal browser, select **Joined** from the **Show** menu, then click the **Refresh** icon to confirm that the portal no longer displays.

Note: If a cancellation request requires approval, you are not removed from the portal immediately. Check back later or monitor your workload; you will receive notification when your unsubscribe request is approved or rejected by the portal moderator.

Part III

Connecting and Collaborating with Other Users

Part III contains the following chapters:

- Chapter 11, "Managing Your Contacts"
- Chapter 12, "Using Instant Messaging and Presence Viewer"
- Chapter 13, "Sending and Viewing Mail"
- Chapter 14, "Working with Feedback and the Message Board"
- Chapter 15, "Liking, Commenting On, and Sharing Items in WebCenter Portal"
- Chapter 16, "Viewing and Participating in Discussions"
- Chapter 17, "Working with Wikis"
- Chapter 18, "Working with Blogs"

Managing Your Contacts

This chapter describes connections, which you can use to establish a social network with your work friends and associates.

This chapter includes the following topics:

- [Section 11.1, "About Connections"](#)
- [Section 11.2, "Setting Connections Preferences"](#)
- [Section 11.3, "Viewing Another User's Profile"](#)
- [Section 11.4, "Viewing Connections"](#)
- [Section 11.5, "Adding Contacts"](#)
- [Section 11.6, "Removing Contacts"](#)
- [Section 11.7, "Creating and Managing Groups of Contacts"](#)

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

11.1 About Connections

Connections provides a means of collecting your business friends and contacts into a social network, where you can manage your own connections and view 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 enable access to views of your profile, message board, activity stream, and feedback to just your connections, leaving the unconnected without access. For your profile, you can limit view privileges to just your connections or enable your connections to view certain sections of your profile, while hiding those sections from users who are not your connections. For your message board and feedback, you can give everyone view access, but limit post access to just your connections or to a limited set of your connections through a connections list.

See Also: For information about setting your Connections preferences, see [Section 11.2, "Setting Connections Preferences."](#)

When you connect with other users, you give them access to your People Connections views, and gain access to theirs.

Note: People Connections encompasses Connections, Profile, Activity Stream, Message Board, and Feedback. For more information, see:

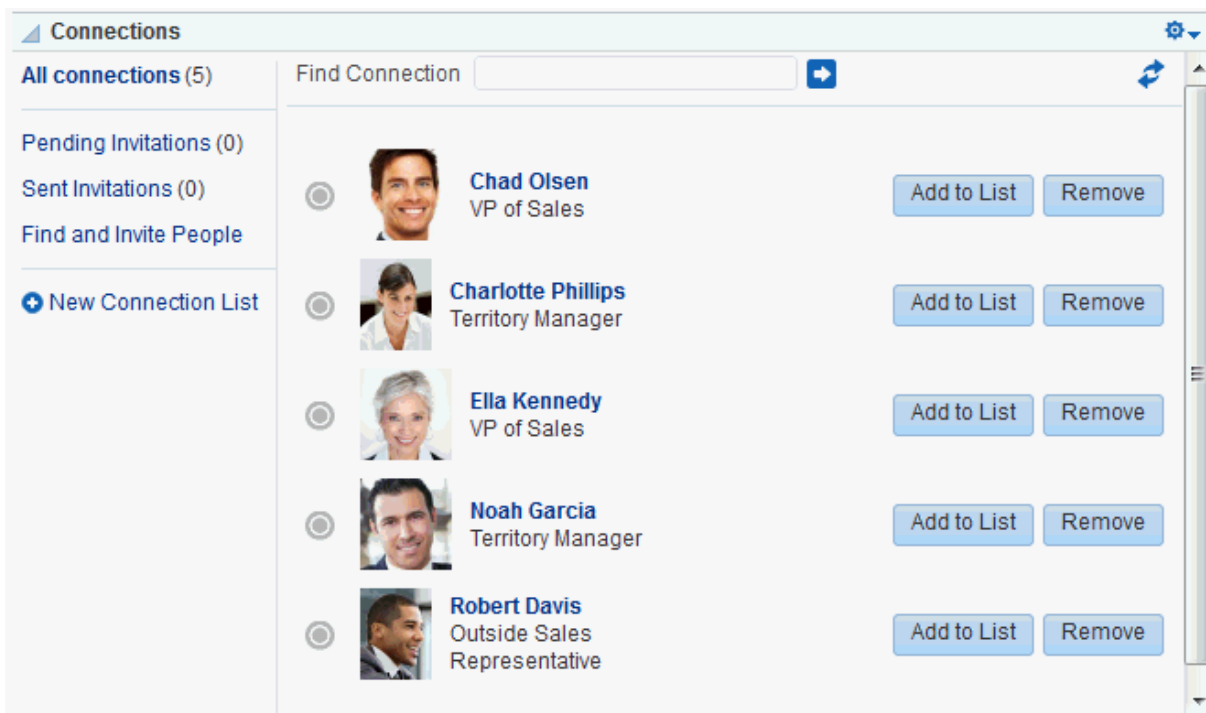
- [Chapter 6, "Managing Your Profile"](#)
 - [Chapter 24, "Tracking Portal Activities"](#)
 - [Chapter 14, "Working with Feedback and the Message Board"](#)
-
-

Before you begin to build your social network, your system administrator can set global application defaults that affect what all users may see and do with their own and other users' connections.

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

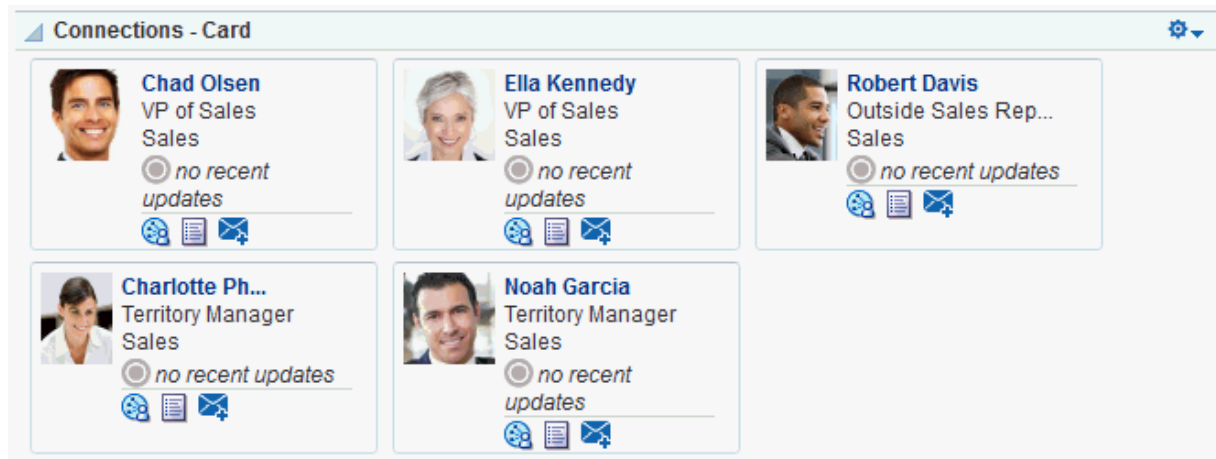
- **Connections** for viewing and managing your connections, creating connections lists, and sending and responding to invitations to connect ([Figure 11-1](#))

Figure 11-1 Connections View



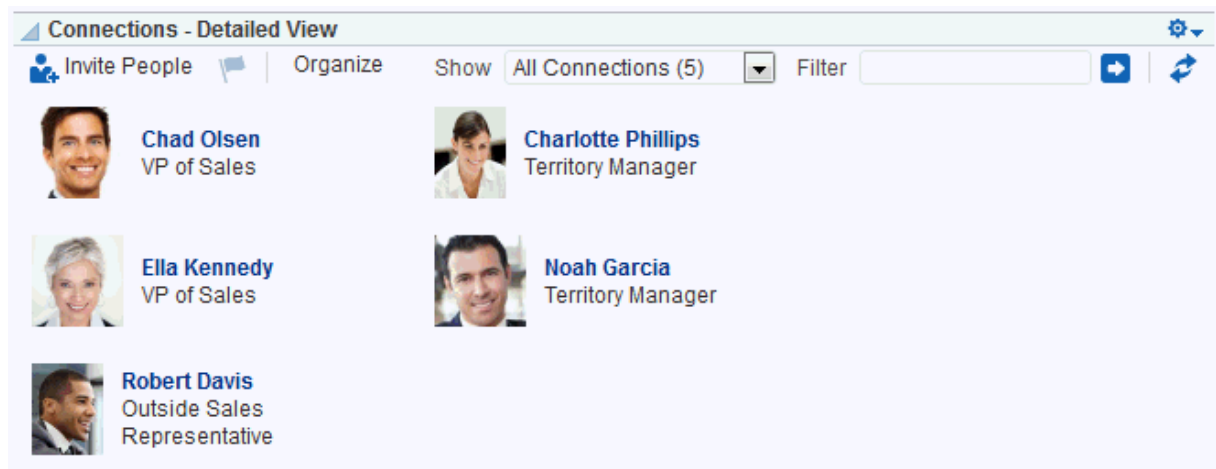
- **Connections - Card** for photos, status messages, and instant contact options to your connections ([Figure 11-2](#))

Figure 11–2 Connections - Card View



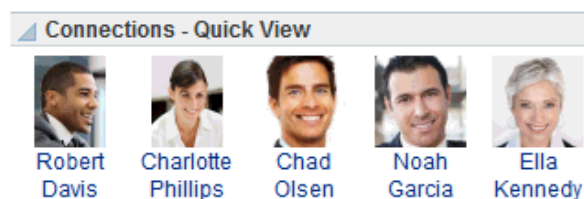
- **Connections - Detailed View** for photos and quick access to your connections and to features for inviting new connections, managing existing connections, and organizing your connections into lists (Figure 11–3). This is the same view you see when you click the **Connections** tab on the **Profile** page.

Figure 11–3 Connections - Detailed View



- **Connections - Quick View** for photos and quick access to your connections (Figure 11–4). This is the same view you see on the right side of the main **Profile** page.

Figure 11–4 Connections - Quick View



For information about using Connections features, see [Section 11.4, "Viewing Connections,"](#) [Section 11.5, "Adding Contacts,"](#) [Section 11.6, "Removing Contacts,"](#) and [Section 11.7, "Creating and Managing Groups of Contacts."](#)

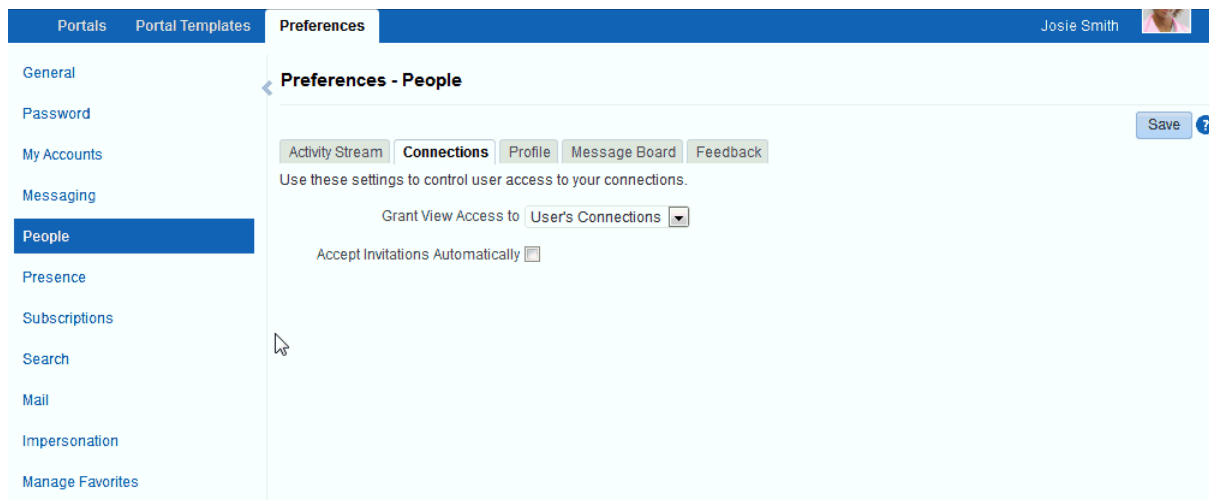
11.2 Setting Connections Preferences

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

To set Connections preferences:

1. Click **Preferences**.
2. Click **People** to display People Connections preferences.
3. Click the **Connections** tab ([Figure 11-5](#)).

Figure 11-5 Connections Preferences



4. From the **Grant View Access to** list, select the users who can view your list of connections:
 - **Everyone**—All users, including users who are not logged in, can see information about your connections.
 - **Authenticated Users**—Only users who are logged in can view your connections.
 - **User's Connections**—Only you and your connections can view your connections.
 - **User Only**—Only you can view your connections.

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

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

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

6. When you are done, click **Save**.

11.3 Viewing Another User's Profile

You access other users' profiles the same way you access your profile. For information, see [Section 6.2, "Viewing a Profile."](#)

11.4 Viewing Connections

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

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

- [Section 11.4.1, "Viewing Your Connections"](#)
- [Section 11.4.2, "Searching Through Your Connections"](#)

11.4.1 Viewing Your Connections

To view your connections:

1. Go to the Home portal, and open your profile page, for example, by clicking on your user name in the UI.

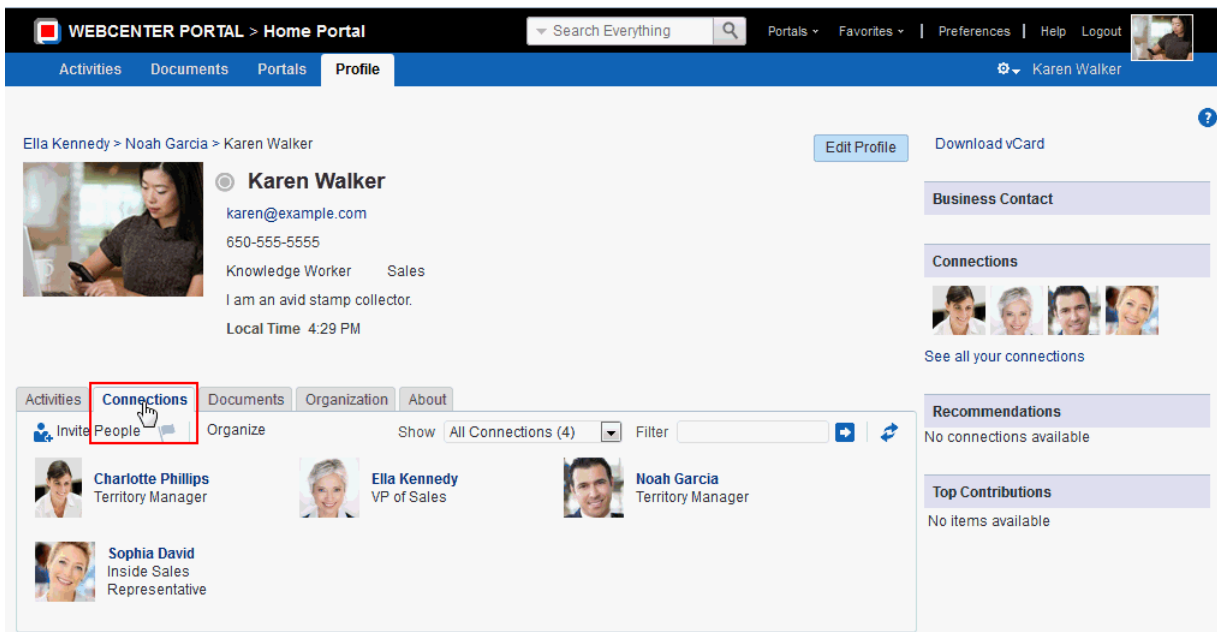
You can also use the following URL to navigate to a Profile page:

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

Tip: For *userName*:

- When *userName* matches the current user or is not specified, this URL navigates to your view of the Profile page.
 - When *userName* is not the current user's, it navigates to the specified user's view of the Profile page.
2. On the Profile page, click the **Connections** tab ([Figure 11-6](#)).


Figure 11–6 Connections Tab on Profile Page



11.4.2 Searching Through Your Connections

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

To search through your connections:

1. Go to the **Connections** page (as described in [Section 11.4.1, "Viewing Your Connections."](#))
2. In the **Filter** field, type the text you want to search for in your connections, and click  next to the **Filter** field.

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

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

11.5 Adding Contacts

This section includes the following subsections:

- [Section 11.5.1, "Inviting Others to Connect"](#)
- [Section 11.5.2, "Viewing Invitations to Connect"](#)
- [Section 11.5.3, "Responding to Invitations to Be a Connection"](#)

11.5.1 Inviting Others to Connect

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

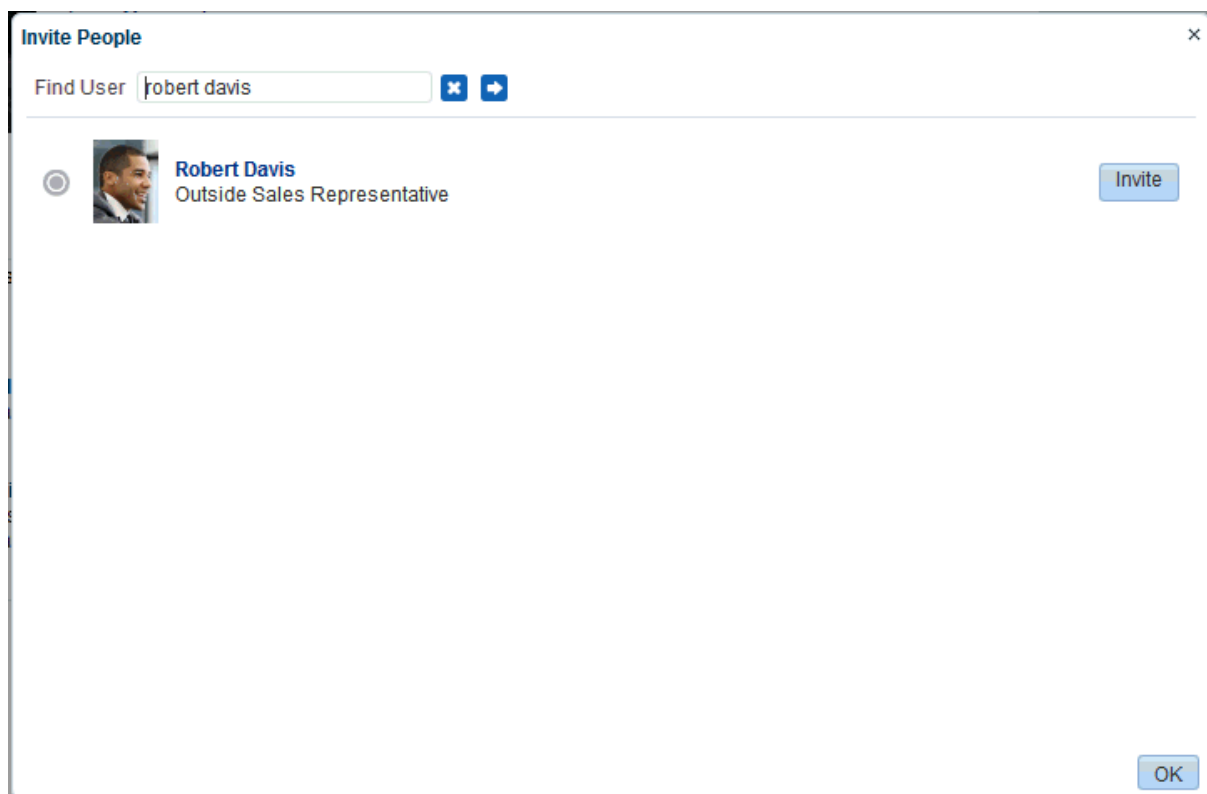
See Also: For information about Connections Preferences, see [Section 11.2, "Setting Connections Preferences."](#)

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

To invite another user to connect:

1. Go to the **Connections** tab (as described in [Section 11.4.1, "Viewing Your Connections."](#))
2. On the **Connections** tab, click the **Invite People** link to open the Invite People dialog ([Figure 11-7](#)).

Figure 11-7 Invite People Dialog




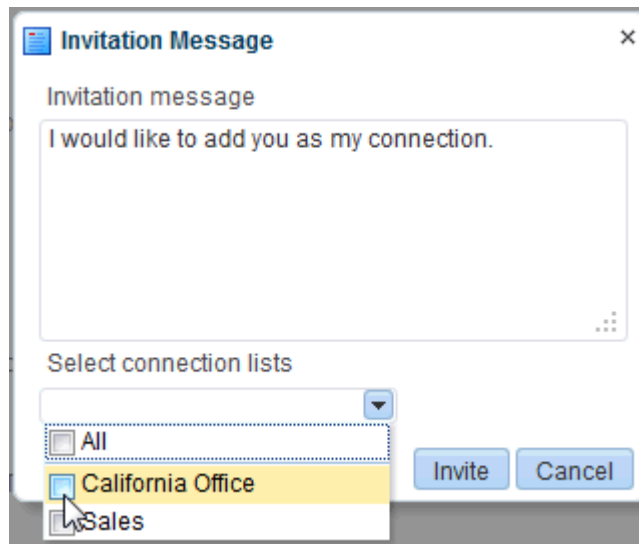
3. In the **Find User** field, type the user name of the person you want to invite to be your connection, then click .
4. Click the **Invite** link next to the user of interest to open the Invitation Message dialog ([Figure 11-8](#)).

Figure 11–8 Invitation Message Dialog

5. Use the default message, or type a new one.
6. Optionally, from the **Select connection lists** list, select one or more connections lists to which to add the user once the invitation is accepted.
7. Click **Invite**.

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

11.5.2 Viewing Invitations to Connect

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

- [Section 11.5.2.1, "Viewing Invitations You Have Sent"](#)
- [Section 11.5.2.2, "Viewing Invitations You Have Received"](#)

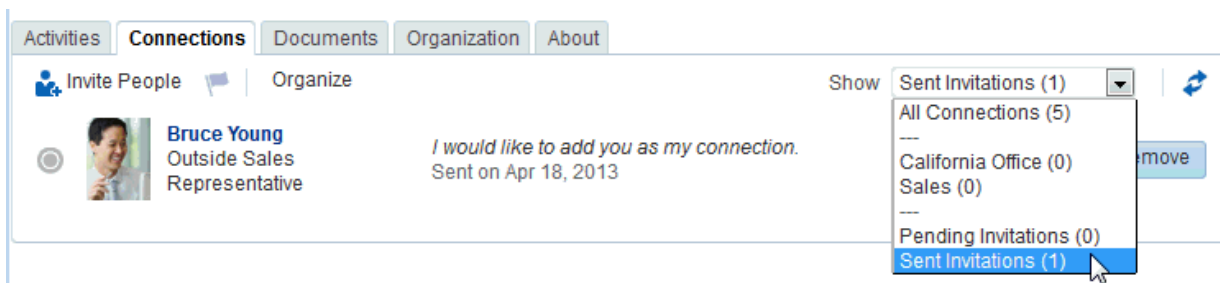
11.5.2.1 Viewing Invitations You Have Sent

To view invitations you have sent:

1. Go to the **Connections** tab (as described in [Section 11.4.1, "Viewing Your Connections."](#))
2. From the **Show** menu, select **Sent Invitations**.

The **Connections** page refreshes, now showing a list of the pending invitations to connect that you have sent ([Figure 11–9](#)).

Figure 11–9 Sent Invitations View




Note: In the **Show** menu, the number next to **Sent Invitations** represents the number of pending invitations you have sent.

11.5.2.2 Viewing Invitations You Have Received

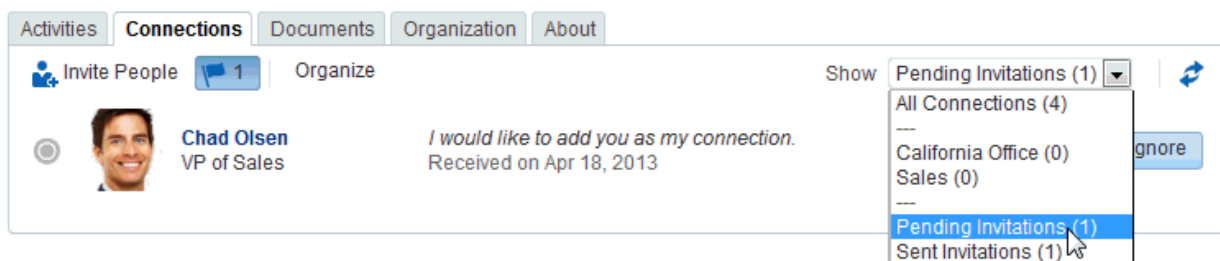
To view invitations you have received:

1. Go to the **Connections** tab (as described in [Section 11.4.1, "Viewing Your Connections."](#))
2. From the **Show** menu, select **Pending Invitations**.

Tip: Alternatively, click .

The **Connections** page refreshes, now showing a list of the pending invitations to connect that you have received ([Figure 11–10](#)).

Figure 11–10 Pending Invitations View



Tip: In the **Show** menu, the number next to **Pending Invitations** represents the number of pending invitations you have received.

11.5.3 Responding to Invitations to Be a Connection


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

- You can set your Connections preferences to accept such invitations automatically. For information, see [Section 11.2, "Setting Connections Preferences."](#)
- You can manually accept, decline, or ignore such invitations through the Connections - Detailed View or on the **Connections** tab of your Profile page.

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

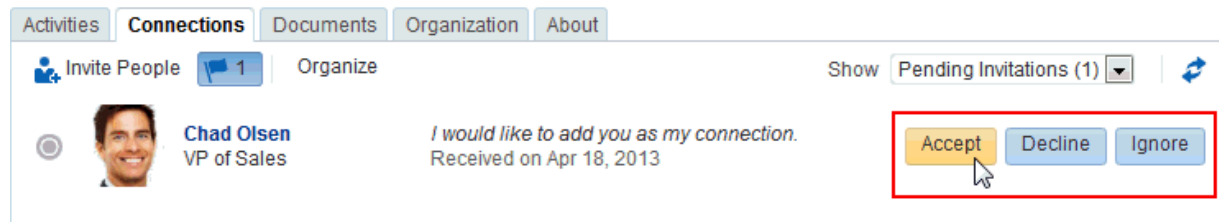
To respond to invitations to connect:

1. Go to the **Connections** tab (as described in [Section 11.4.1, "Viewing Your Connections."](#))
2. From the **Show** menu, select **Pending Invitations** to display a list of your pending invitations.

Tip: Alternatively, click .

3. Next to a given invitation, click your desired response ([Figure 11–11](#)).

Figure 11–11 Pending Invitations View Showing Accept, Decline, and Ignore Buttons



- **Accept**—Make the connection.
- **Decline**—Refuse the connection, with notification. When you decline an invitation to connect, the issuer becomes aware of this by watching his sent invitations.
- **Ignore**—Remove the connection, without responding. When you ignore an invitation to connect, the issuer does not become aware of this by watching his sent invitations.

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

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

11.6 Removing Contacts

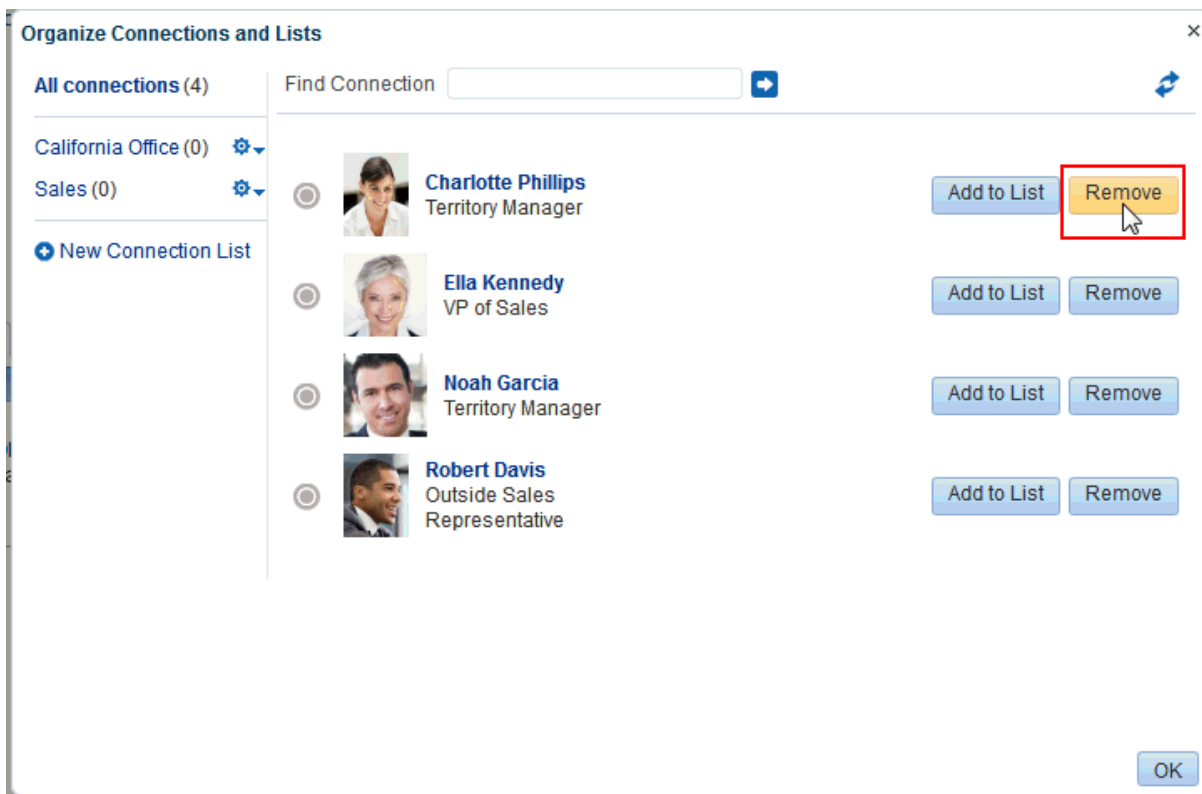
Included in the process of managing your connections is the occasional necessity of removing connections: they may leave your group or the company, or there may no longer be a compelling reason to stay connected.

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

To remove one of your connections:

1. Go to the **Connections** tab (as described in [Section 11.4.1, "Viewing Your Connections."](#))
2. Click **Organize** to open the Organize Connections and Lists dialog.
3. Click the **Remove** button next to the connection to remove ([Figure 11–12](#)).

Figure 11–12 Remove Connection



4. In the confirmation dialog, click **Yes** to remove the selected connection.
5. Click **OK** to close the Organize Connections and Lists dialog.

11.7 Creating and Managing Groups of Contacts

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

- You can select a list and view just its members on the **Connections** tab or in the Connections viewer or Connections - Detailed View.
- You can configure Activity Stream preferences to show activities only from specified connections lists (for more information, see [Section 24.3, "Setting Activity Stream Preferences"](#)).

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

- [Section 11.7.1, "Creating a Connections List"](#)
- [Section 11.7.2, "Adding a Connection to a List"](#)
- [Section 11.7.3, "Removing a Connection from a List"](#)
- [Section 11.7.4, "Deleting a Connections List"](#)

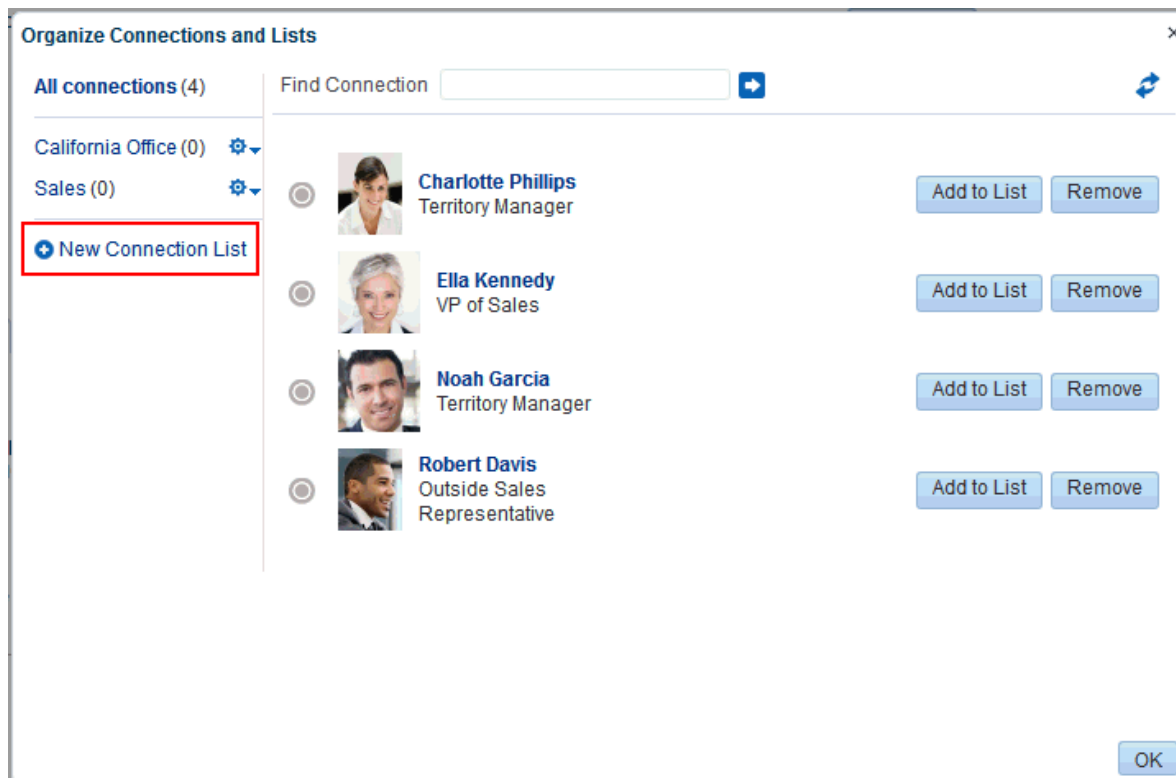
11.7.1 Creating a Connections List

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

To create a list of connections:

1. Go to the **Connections** tab (as described in [Section 11.4.1, "Viewing Your Connections."](#))
2. Click **Organize** to open the Organize Connections and Lists dialog.
3. Click **New Connection List** ([Figure 11-13](#)) to open the **Create List** dialog.

Figure 11-13 *New Connection List*



4. Enter a name for your list of connections, and click **Save and Close** to create the list and open it in the Organize Connections and Lists dialog.

Tip: To view all of your connections, click **All connections**.

See Also: For information about adding connections to a list, see [Section 11.7.2, "Adding a Connection to a List."](#)

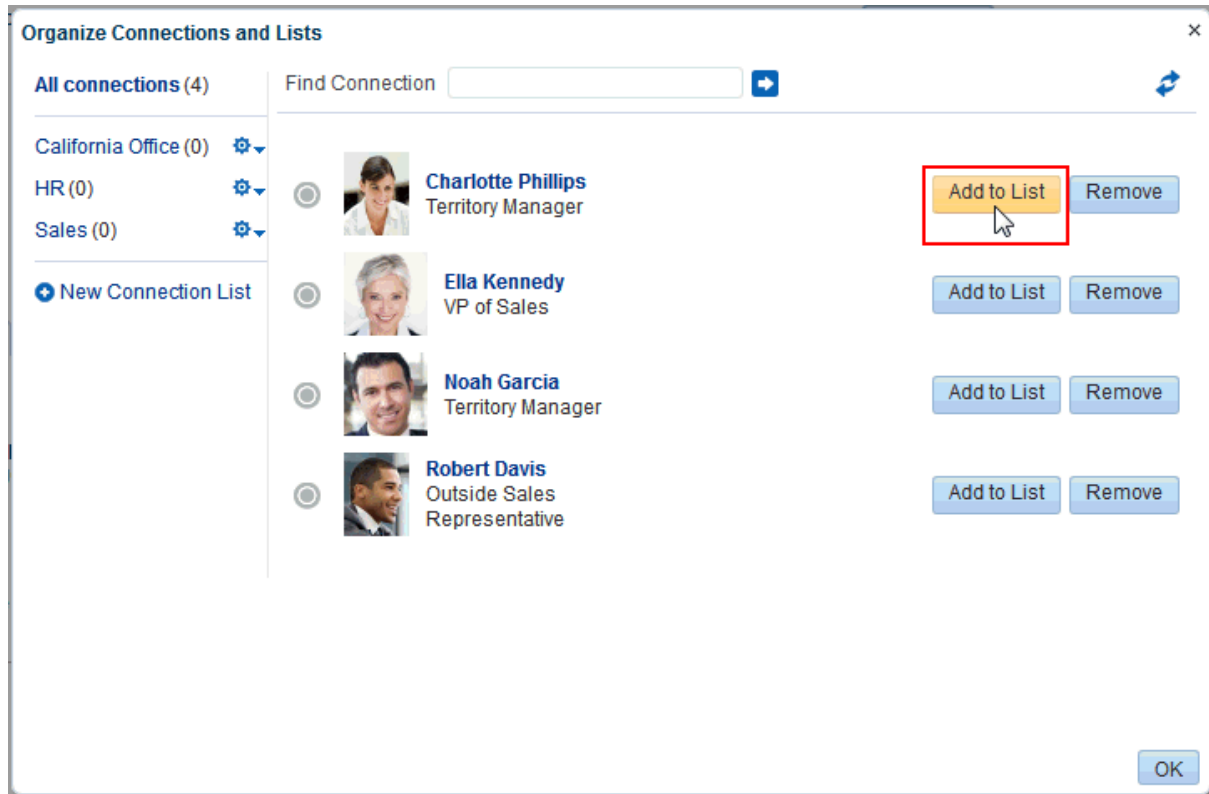
11.7.2 Adding a Connection to a List

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

To add a connection to a Connections list:

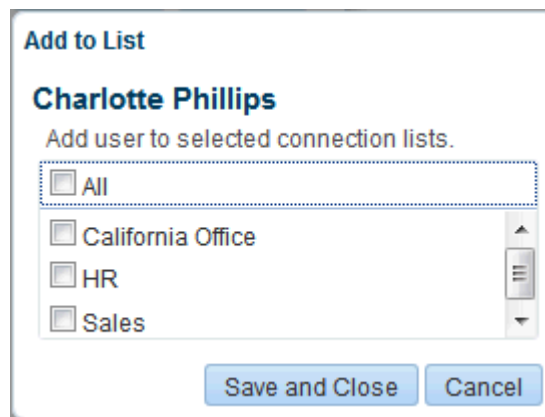
1. Go to the **Connections** tab (as described in [Section 11.4.1, "Viewing Your Connections."](#))
2. Click **Organize** to open the Organize Connections and Lists dialog.
3. Click **Add to List** ([Figure 11-14](#)) next to the user.

Figure 11-14 Add to List



4. In the Add to List dialog ([Figure 11-15](#)), select one or more lists, then click **Save and Close**.

Figure 11-15 Add to List Dialog



Tip: Click **All** to add the selected user to all of your Connections lists.

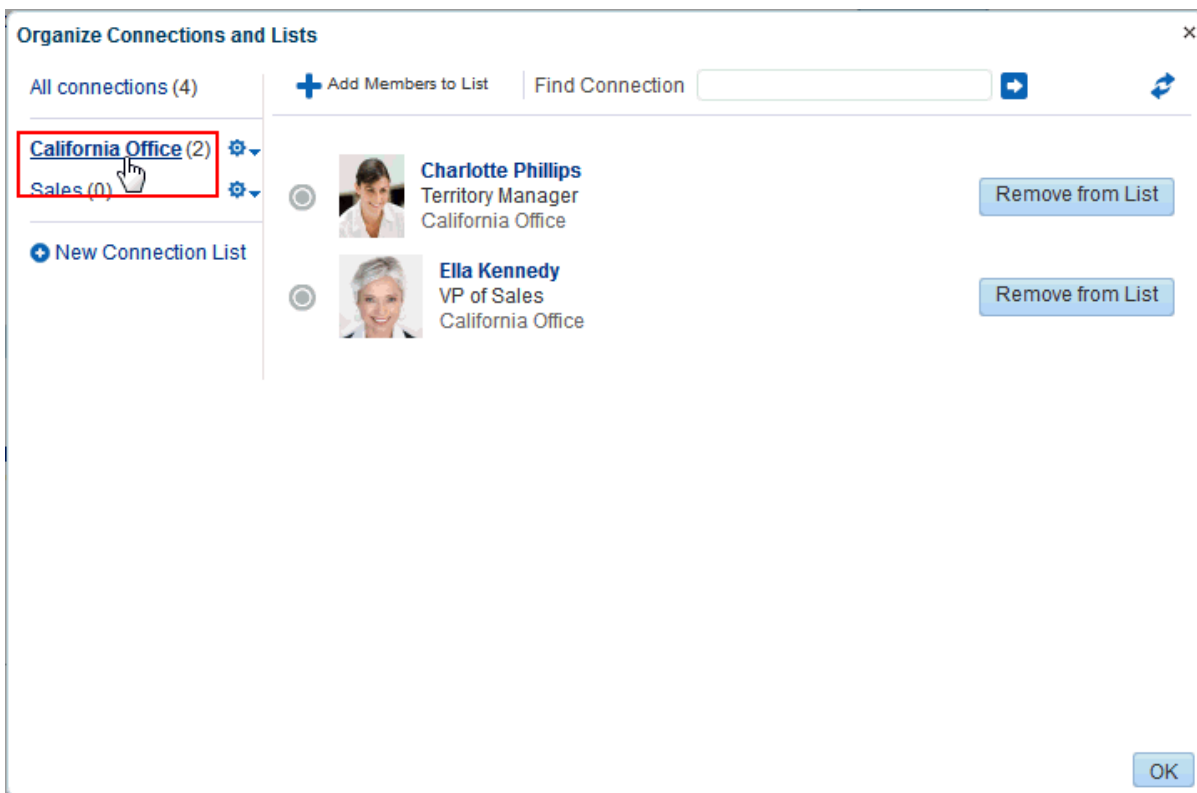
5. Repeat steps 3 and 4 until you are done.
6. Click **OK** to close the Organize Connections and Lists dialog.

11.7.3 Removing a Connection from a List

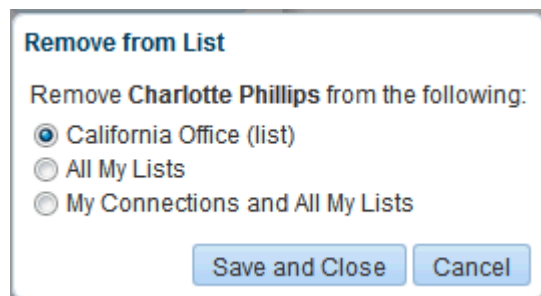
To remove a connection from a list:

1. Go to the **Connections** tab (as described in [Section 11.4.1, "Viewing Your Connections."](#))
2. Click **Organize** to open the Organize Connections and Lists dialog.
3. Select the list from which to remove a connection ([Figure 11-16](#)) to display the connections list.

Figure 11-16 Organize Connections and Lists Dialog with California Office List Selected



4. Click **Remove from List** next to the user to open the Remove from List dialog ([Figure 11-17](#)).

Figure 11–17 Remove from List Dialog

5. Select to remove the selected user from the current list or from all lists of which the user is a member, or select **My Connections and All My Lists** to remove the selected user from all lists and remove the user from your connections.
6. Click **Save and Close**.
7. Repeat steps 3 through 5 until you are done.
8. Click **OK** to close the Organize Connections and Lists dialog.

11.7.4 Deleting a Connections List

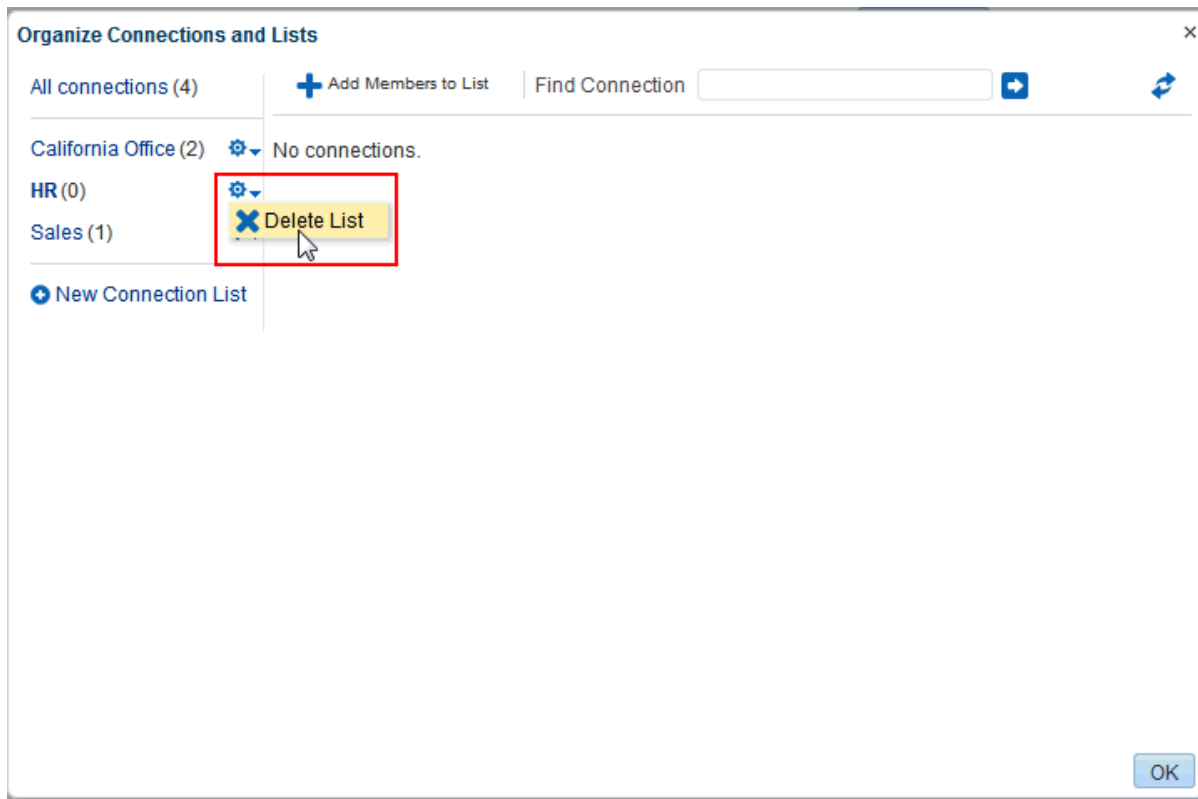
When you delete a Connections list, you are not deleting the connections you added to the list. You are deleting only the selected grouping, that is, the list itself. The connections that were on the deleted list continue to be your connections.

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

To delete a connections list:

1. Go to the **Connections** tab (as described in [Section 11.4.1, "Viewing Your Connections."](#))
2. Click **Organize** to open the Organize Connections and Lists dialog.
3. Click the **Actions** icon next to the Connections list you want to delete, and select **Delete List** from the resulting menu ([Figure 11–18](#)).

Figure 11–18 Delete List Option on Actions Menu



4. In the resulting confirmation dialog, click **Yes** to delete the list.
5. Click **OK** to close the Organize Connections and Lists dialog.

Using Instant Messaging and Presence Viewer

This chapter describes how to use WebCenter Portal's instant messaging and presence (IMP) features. You can see the presence status of other authenticated users and interact with them through instant messages and mail. Additionally, if enterprise presence is unavailable, you can connect to a 3rd-party network presence service, such as Yahoo! Messenger.

This chapter includes the following topics:

- [Section 12.1, "About Instant Messaging and Presence"](#)
- [Section 12.2, "Identifying Your Preferred Instant Messaging Provider"](#)
- [Section 12.3, "Configuring Network Presence"](#)
- [Section 12.4, "Working with IMP Features"](#)

Permissions: This chapter is intended for WebCenter Portal users who want to view, create, and manage instant messaging and presence.

Such users must be granted, minimally, the portal-level permission `View Pages and Content`. They can view the presence of other users only for assets for which they have `view` permission.

Authenticated users require the portal-level permission `Customize Pages and Edit Content`. They must have `view` permission on the asset. These permissions are granted by default to the portal `Participant` role.

12.1 About Instant Messaging and Presence

Note: For Instant Messaging and Presence to work in a portal, make sure that:

- The back-end presence server has been installed and configured by the system administrator and the connection between WebCenter Portal and the application is active. For more information, see the "Managing Instant Messaging and Presence" chapter in *Administering Oracle WebCenter Portal*.
 - The external application has been registered by the system administrator. For more information, see the "Managing External Applications" chapter in *Administering Oracle WebCenter Portal*.
-
-

Instant messaging and presence (IMP) lets you observe the presence status of other authenticated users (online, offline, busy, or away) and then interact with them through instant messages and mail. Wherever a user is indicated, for example as the author of a document in the document library, you can see an icon (Figure 12–1) depicting the presence state of that user.

Figure 12–1 Presence Icon for Online Users



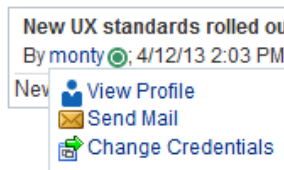
If you hover your mouse over the **Presence** icon, a tooltip displays the current status message for that user, if available. If the user has not provided a status message, or the message cannot be retrieved, then the tooltip displays the presence state of the user (online, offline, busy, or away).

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

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

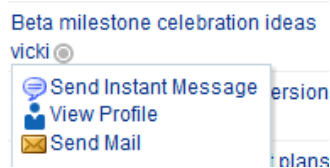
- When viewing the Presence icon for your self, you can see the following options: View Profile, Send Mail, and Change Credentials (Figure 12–2)

Figure 12–2 Presence Icon Context Menu For the Current User



- When viewing the Presence icon for another user, you can see the following options: Send Instant Message, View Profile, and Send Mail (Figure 12–3)

Figure 12–3 Presence Icon Context Menu For Another User



From the list you can:

- View the user's profile. For more information, see [Section 12.4.1, "Viewing the Status of Other Users."](#)
- Send mail to the user. For more information, see [Section 12.4.2, "Sending a Mail Message from the Presence Icon Menu."](#)
- Change credentials (appears in the logged in user's context only), where users can update their external application login information. For more information, see [Section 5.7, "Providing Login Information for External Applications."](#)

- Send an instant message to the user (appears in the list for another user only). For more information, see [Section 12.4.3, "Sending an Instant Message from the Presence Icon Menu."](#)

Note: The options that display in the list depend on what services are available to WebCenter Portal, how those services are configured, and which services are supported by the back-end presence server. For more information, see the "Managing Instant Messaging and Presence" chapter in *Administering Oracle WebCenter Portal*.

12.2 Identifying Your Preferred Instant Messaging Provider

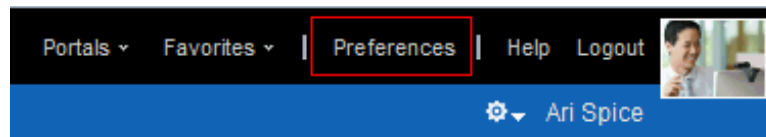
Instant messaging and presence requires a back-end presence server. WebCenter Portal is certified with Microsoft Office Live Communications Server (LCS) 2005, Microsoft Office Communications Server (OCS) 2007, and Microsoft Lync 2010. When presence is not available (for example, if your enterprise uses a Jabber/XMPP presence server or has federated presence servers with users distributed across identity management systems), you can connect to a public network presence service. For more information, see the "Managing Instant Messaging and Presence" chapter in *Administering Oracle WebCenter Portal*.

Out-of-the-box, WebCenter Portal supports Yahoo! Messenger on network presence. However, the network presence model can be extended to include other providers, such as ICQ. To do so, you must build a presence network agent (PNA) that understands how to process each user's presence from a certain URL.

To enable network presence:

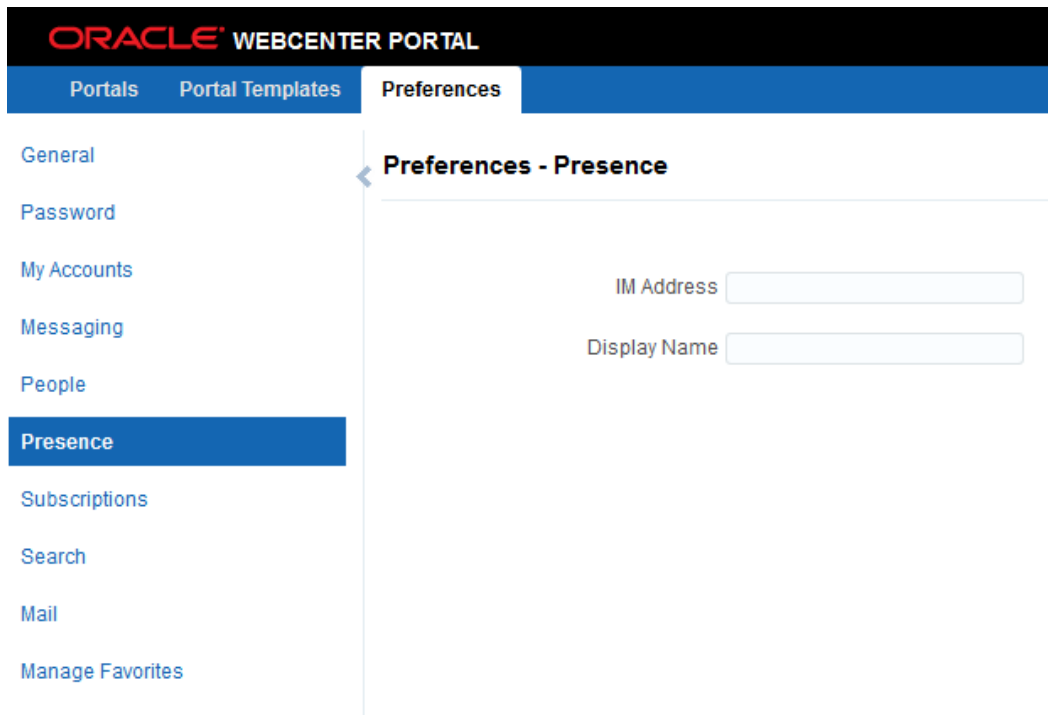
1. Click the **Preferences** link at the top of WebCenter Portal ([Figure 12-4](#)).

Figure 12-4 Preferences Link



2. Click **Presence** to open the Preferences - Presence pane ([Figure 12-5](#)).

Figure 12–5 Presence - Preferences Pane



3. Enter the IM address for the presence status and a display name (Figure 12–5).

Note: PNAs run on the IM address. The IMP service consults all registered PNAs to see if one can support this IM address. If so, then it delegates to the respective agent. If you register a new PNA where you identify every user presence with the domain `mydomain.com`, then your PNA handles the presence for user IM addresses like `XYZ@mydomain.com`.

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

Note: If you change your IM address, you must log out of WebCenter Portal and then log in again to view your presence status.

Presence tags for that user shows their network presence, either online (Figure 12–6) or offline (Figure 12–7).

Figure 12–6 Yahoo Presence Icon - Online



Figure 12–7 Yahoo Presence Icon - Offline



12.3 Configuring Network Presence

To set your presence to Yahoo! Messenger:

1. Click the **Preferences** link at the top of WebCenter Portal ([Figure 12-4](#)).
2. Click **Presence** to open the Preferences - Presence pane.
3. Enter your Yahoo! Messenger ID in the **IM Address** field and a display name for yourself ([Figure 12-8](#)).

Figure 12-8 Presence Preferences Pane

The screenshot shows the Oracle WebCenter Portal interface. At the top, there is a navigation bar with 'Portals', 'Portal Templates', and 'Preferences'. The 'Preferences' section is expanded, showing a list of options: General, Password, My Accounts, Messaging, People, Presence (highlighted), Subscriptions, Search, Mail, and Manage Favorites. The 'Presence' pane is titled 'Preferences - Presence' and contains two input fields: 'IM Address' and 'Display Name'.

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

To revert to your enterprise presence, when you are back on your network, remove this information from Preferences - Presence.

Note: To send instant messages to an online user on Yahoo! Messenger, you also must have Yahoo! Messenger installed.

12.4 Working with IMP Features

Many WebCenter Portal features include a presence capability that enables you to make contact with other users from within the context of what you want to contact them about. For example, if you see a post in a discussion topic and want to send an instant message to the author of that post, you can do so directly from the discussion topic.

This section includes the following topics:

- [Section 12.4.1, "Viewing the Status of Other Users"](#)
- [Section 12.4.2, "Sending a Mail Message from the Presence Icon Menu"](#)

- [Section 12.4.3, "Sending an Instant Message from the Presence Icon Menu"](#)

12.4.1 Viewing the Status of Other Users

Wherever a feature includes a **Presence** icon ([Figure 12–1](#)), you can start an instant chat or send a mail to the user associated with the icon.

The way you communicate with another user depends upon their availability. For example, if the user is online, then you could send an instant message to make immediate contact. However, if the user is offline or busy, then sending a mail message is probably a better option.





Additionally, users can provide further information about their status by providing status messages. If such a status message exists for a user, hovering over the **Presence** icon displays that message as a tooltip. The status message enables you to make an even more informed decision about how to make contact. If there is no status message for the user, then the presence state is displayed in the tooltip instead (online, offline, busy, or away).

To view the current presence status or status message of a user, simply hover the mouse over the **Presence** icon next to the user's name.

Note: The presence state of the user is held in a cache with a default expiration time of 60 seconds. As a result, the **Presence** icon may not reflect the actual status of the user if the status has changed between the initial retrieval and the cache expiry time.

[Table 12–1](#) describes the presence state each **Presence** icon indicates.

Table 12–1 *Presence Icon Presence States*

Presence Icon	State
	Associated user is online.
	Associated user is online, but busy. Please do not disturb.
	Associated user is still connected but away from the computer.
	Associated user is offline.

12.4.2 Sending a Mail Message from the Presence Icon Menu

Wherever you see a **Presence** icon, you can send a mail message to its associated user.

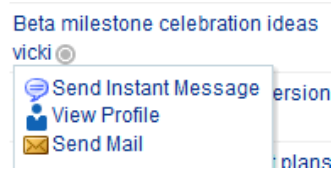
To send a mail message:

1. Locate a **Presence** icon ([Figure 12–1](#)) for the person you want to contact.

For example, you can find **Presence** icons associated with documents and discussion topics—any view that has been configured to support IMP.

2. Click the **Presence** icon associated with the user you want to contact. The available options appear, as shown in [Figure 12–9](#).

Figure 12–9 Presence Icon For Another User



3. From the list, select **Send Mail**.

You might be presented with a login window. If so, then enter your user name and password for your mail application. If your preferences are set up to deliver your login credentials automatically, you can start your message right away. For more information about login credentials and preferences, see [Chapter 5, "Setting Your Personal Preferences."](#)

4. Compose your message and click **Send**.

12.4.3 Sending an Instant Message from the Presence Icon Menu

Wherever you see a **Presence** icon, you can send an instant message to its associated user.

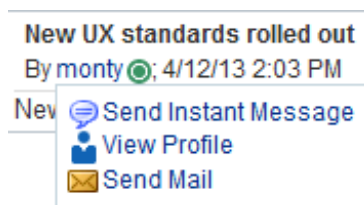
Before you can send an instant message, you must install the appropriate chat client (and only that client) on your local computer. The client must be configured to connect to the back-end presence server. To use Microsoft Live Communications Server (LCS) 2005, Microsoft Office Communications Server (OCS) 2007, or Microsoft Lync 2010, install the Microsoft Communicator.

Contact your system administrator if you are not sure which client to install or how to connect to the presence server.

To send an instant message:

1. Locate a **Presence** icon ([Figure 12–1](#)) for the person you want to contact.
For example, you can find **Presence** icons associated with documents and discussion topics—any place that has been configured to support IMP.
2. Click the **Presence** icon associated with the user you want to contact. The available options appear, as shown in [Figure 12–10](#).

Figure 12–10 Presence Icon Options For Another User



3. From the list, select **Send Instant Message**.

WebCenter Portal invokes your instant messaging client, and starts a chat session with the selected user.

Sending and Viewing Mail

This chapter describes how to use the Send Mail feature and also the features provided through WebCenter Portal Mail or your local mail client. The Send Mail feature does not require the mail service. That is, even if the mail service has not been configured in your WebCenter Portal, you can use the Send Mail feature with the 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 13.1, "About the Send Mail Feature"](#)
- [Section 13.2, "About Mail in WebCenter Portal"](#)
- [Section 13.3, "Selecting Your Preferred Mail Connection"](#)
- [Section 13.4, "Working with Mail"](#)

Permissions: This chapter is intended for WebCenter Portal users who want to use the mail feature.

Such users must be granted, minimally, the portal-level permission `View Pages and Content` to view mail. They can view mail only for assets for which they have `view` permission.

Authenticated users require the portal-level permission `Customize Pages and Edit Content`. They must have `view` permission on the resource. These permissions are granted by default to the portal `Participant` role.

Note: Some of the tasks discussed in this chapter are not available if the mail is not configured. Portal moderators can add the Mail viewer to a portal, as described in the "Adding Mail to a Portal" chapter in *Building Portals with Oracle WebCenter Portal*.

13.1 About the Send Mail Feature

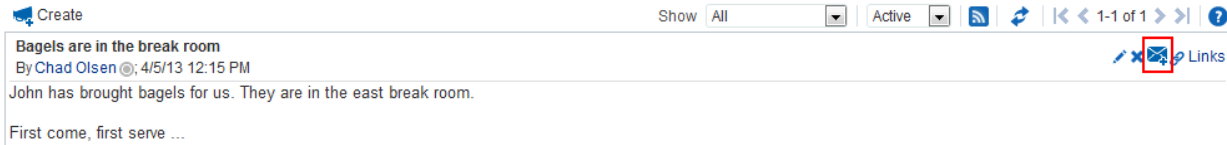
Throughout WebCenter Portal, you can click the **Send Mail** icon ([Figure 13–1](#)) to mail directly from another feature, such as announcements ([Figure 13–2](#)). You need to have the required permissions to work with the other features in order to use the Send Mail feature from the feature.

Figure 13–1 Send Mail Icon



For example, [Figure 13–2](#) shows an announcement topic with the **Send Mail** icon.

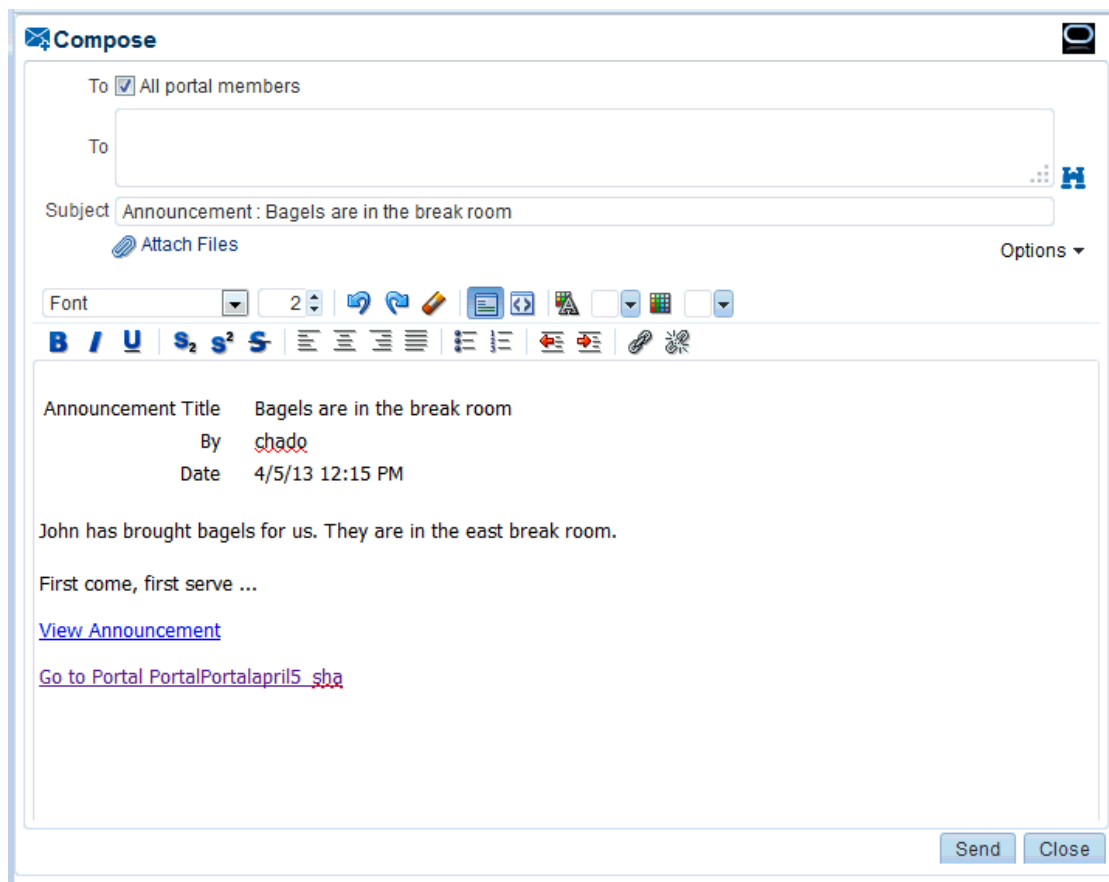
Figure 13–2 Send Mail Icon in an Announcement



Click the **Send Mail** icon to open a mail compose window prepopulated with information including the announcement topic title, author, date created, topic text, and links to the announcement and the portal. You can edit and add to the mail, as necessary.

Note: to use WebCenter Portal's Send Mail (not your local mail client), you must change the mail preference (see [Section 13.3, "Selecting Your Preferred Mail Connection"](#)). If you are using your local mail client, you are required to log in to mail if you are not logged in (see [Section 13.4.1, "Logging in to Mail"](#)). Log out and then log back in to WebCenter Portal after you change your preferences.

Figure 13–3 WebCenter Portal Mail Compose Window From an Announcement



The way the mail window is prepopulated depends on the asset sending it. For example, from a wiki, **Send Mail** opens a mail window prepopulated with the name of the wiki, the size, who created it and when, who modified it and when, and a URL link to the wiki.

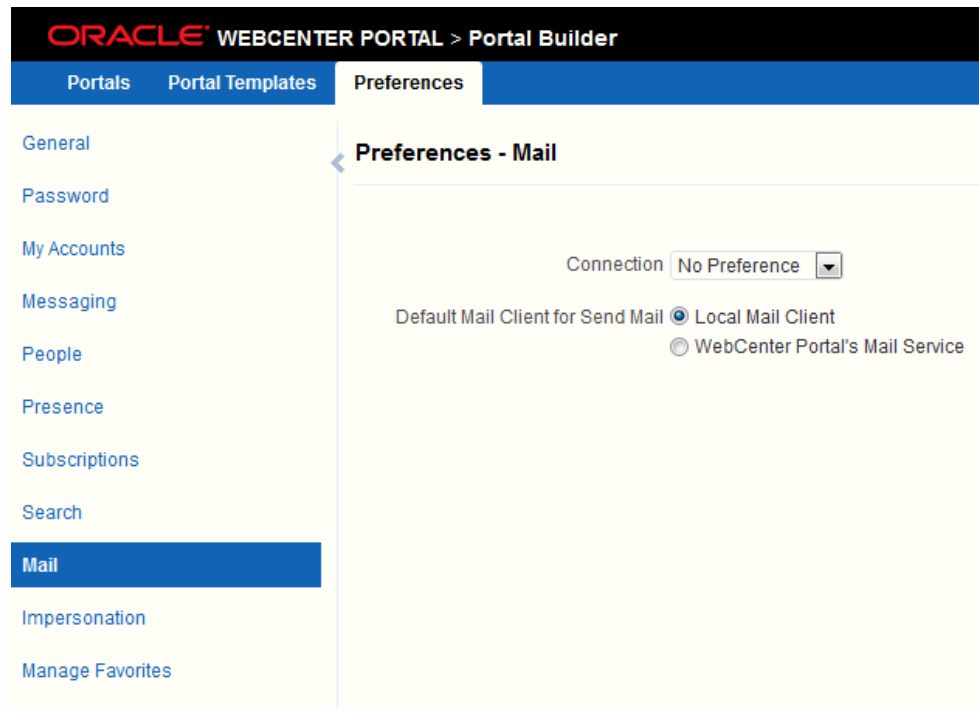
Mail, is by default, addressed to all members of the portal. Portal moderators can configure the distribution list.

Tip: With the Microsoft Outlook local mail client, you must configure Outlook to support comma-delimited mail addresses.

13.1.1 Configuring the Send Mail Feature

The Send Mail feature does not require the mail service to be configured. That is, even if mail has not been configured in WebCenter Portal, the Send Mail feature is available using WebCenter Portal's Mail service.

Your system administrator determines the mail client that the Send Mail feature uses: either **WebCenter Portal's Mail Service** or a **Local Mail Client**. The default value is a **Local Mail Client**. If your system administrator enabled users to override this mail client setting, then you can select a different mail client on the **Preferences - Mail** page (Figure 13–4).

Figure 13–4 Mail Preferences for Send Mail

See [Section 13.3, "Selecting Your Preferred Mail Connection"](#) for more information about setting mail preferences.

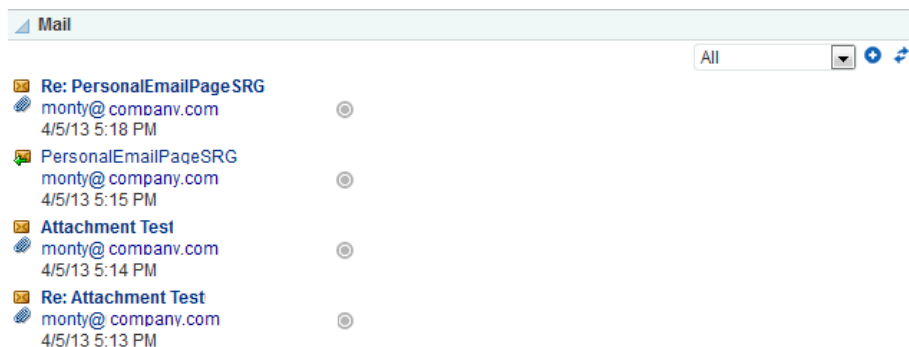
13.2 About Mail in WebCenter Portal

WebCenter Portal conveniently exposes familiar mail functionality. Mail is managed on the same mail server that provides your regular business mail, and the mail messages exposed are the same messages you would see in your mail inbox. Many of the same actions are also supported. For example, you can send messages with attachments, forward messages, and so on. The mail feature does not replace your company mail, but rather enhances it by making it accessible within WebCenter Portal.

WebCenter Portal's Mail service enables users to perform simple mail functions, such as view, read, create and create with attachments, reply, forward, and delete. All mail is stored in your inbox and can be accessed from there through a link.

WebCenter Portal fetches mail from the inbox folder only. It does not support fetching mail from other folders or moving messages. It supports any mail server based on IMAP4 and SMTP protocol. A WebCenter Portal application provides access to multiple mail connections. You can use a different mail connection by selecting it in WebCenter Portal's Preferences settings. For more information, see [Section 13.3, "Selecting Your Preferred Mail Connection."](#)

The Mail viewer exposes features from your mail server ([Figure 13–5](#)).

Figure 13–5 Mail in WebCenter Portal

The Mail viewer presents the following:

- A menu for specifying which messages to display
- A **Compose** icon for starting the process of creating a new message
- A **Refresh** icon for updating new messages

Note that the mail viewer does not render embedded images. If an email contains inline images, they are shown as attachments, and not within the message body.

A default distribution list containing all the portal members is created upon portal creation. The portal moderator can also select a different distribution list. As members are added to or deleted from the portal, the mailing list is updated automatically.

You can mail other users or any user recognized by the back-end mail server by adding their mail addresses in the To field.

Mail is integrated with WebCenter Portal's instant messaging and presence to provide additional options for contacting others. Each listed mail message in the viewer includes the sender's user name and status icon, which you can click to open a menu with options for starting a chat session or sending a new mail.

Note: If instant messaging and presence is not configured in WebCenter Portal, the status icons are grayed out. For more information, see [Chapter 12, "Using Instant Messaging and Presence Viewer."](#)

13.3 Selecting Your Preferred Mail Connection

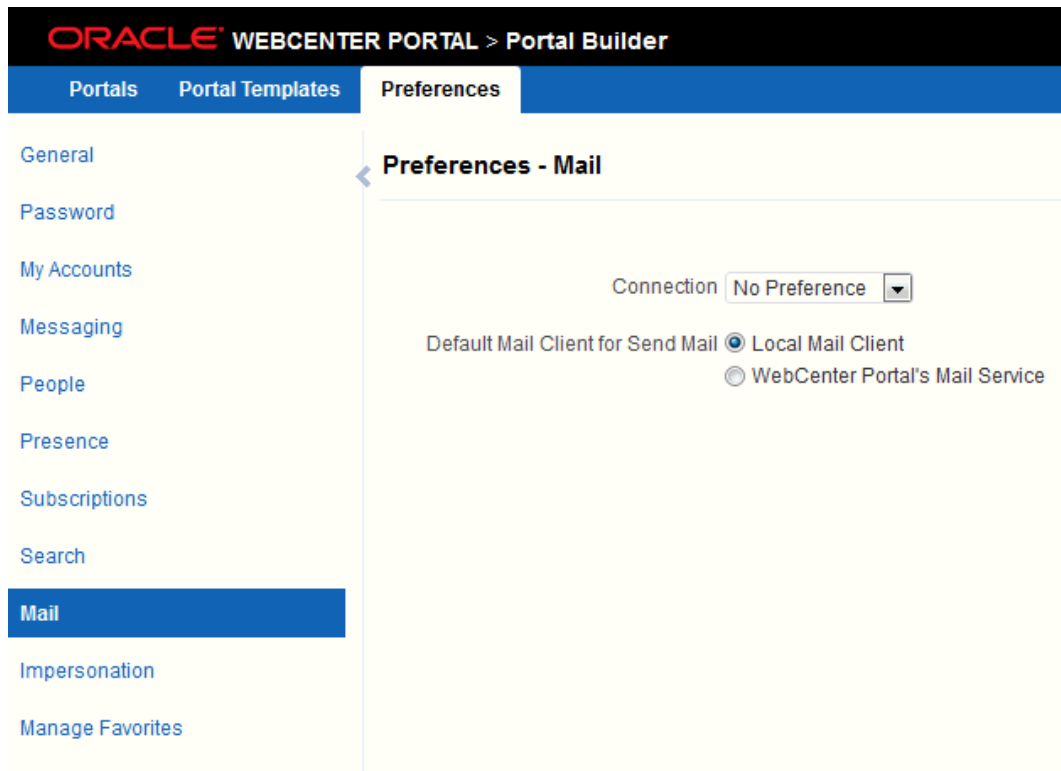
When WebCenter Portal provides access to multiple mail connections, it also provides a way for you to choose which connection to use.

Note: You can choose your preferred mail connection only if your system administrator enabled users to override this mail client setting. See [Section 13.1.1, "Configuring the Send Mail Feature"](#) for more information.

To choose your preferred mail connection:

1. Click the **Preferences** link at the top of the portal.
2. Click **Mail** to open the Preferences - Mail panel ([Figure 13–6](#)).

Figure 13–6 Mail Preferences



3. From the **Connection** drop-down list, select the mail connection you want to use for accessing your mail through WebCenter Portal.

The options available in this list depend on the connections your system administrator makes available to WebCenter Portal. The **No Preference** option uses your system-level active mail connection.

4. Under **Default mail client for Send Mail action**, select an option to identify the mail application to open when the `SendMail` command is invoked.

Choose one of the following options:

- **Local mail client**—Select to specify that the local mail client you normally use, such as Microsoft Outlook or Mozilla Thunderbird, should open a compose message window when the `SendMail` command is invoked.
 - **WebCenter Portal's Mail Service**—Select to specify to open WebCenter Portal's Mail service compose message window when the `SendMail` command is invoked.
5. Click **OK** to save your change and exit the Preferences dialog.
 6. Log out of WebCenter Portal.
 7. Log in to WebCenter Portal.

If you previously saved your credentials for this mail connection to the WebCenter Portal credential store, then you are logged in to the new mail connection automatically.

If you have not previously saved your credentials, log in to this mail connection using Preferences (see [Section 5.7, "Providing Login Information for External Applications"](#)) or using the login link where you see mail (see [Section 13.4.1,](#)

"Logging in to Mail").

13.4 Working with Mail

WebCenter Portal's mail feature exposes your company's mail features within the context of your portal. You can view, respond to, and manage your personal mail.

This section provides information on how to use mail in WebCenter Portal. It contains the following topics:

- [Section 13.4.1, "Logging in to Mail"](#)
- [Section 13.4.2, "Personalizing Your View of Mail"](#)
- [Section 13.4.3, "Opening Mail Messages"](#)
- [Section 13.4.4, "Downloading Mail Attachments"](#)
- [Section 13.4.5, "Composing and Sending Mail Messages"](#)
- [Section 13.4.6, "Sending Mail with Attachments"](#)
- [Section 13.4.7, "Removing Attachments from the Add Attachment Window"](#)
- [Section 13.4.8, "Replying To and Forwarding Mail"](#)
- [Section 13.4.9, "Refreshing Mail"](#)
- [Section 13.4.10, "Deleting Mail"](#)

13.4.1 Logging in to Mail

If you are using your local mail client, before you can access your mail in a portal, you must provide your mail login credentials. The first time you access mail, it displays the message depicted in [Figure 13-7](#).

Figure 13-7 Mail Login Message



To log in to mail:

1. Click the **Login to Mail** link ([Figure 13-7](#)) to open an External Application Login dialog ([Figure 13-8](#)).

Figure 13–8 External Application Login Dialog

Note: The External Application Login dialog may include additional fields and information, depending on the requirements of the mail service that provides it. For more information about external applications and storing your login credentials in WebCenter Portal, see [Section 5.7, "Providing Login Information for External Applications."](#)

2. Enter your user name and password and any other login credentials that your mail application requires.
Required fields are marked with an asterisk (*).
3. Optionally, deselect or keep selected the **Remember My Login Information** to store your credentials.
The next time you log in to WebCenter Portal, your mail credentials are retrieved from storage and you are logged in.
4. Click **OK**, and mail displays from your inbox.

13.4.2 Personalizing Your View of Mail

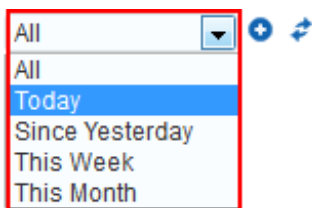
You can personalize your view of the mail by filtering the number of displayed messages. For example, you can choose to display only the messages that were delivered **Today**, **Since Yesterday**, **This Week**, or **This Month**. Additionally, you can choose to display **All** messages in your inbox.

Note: By default, the 50 most recent mail messages from your mail server inbox folder are displayed.

Personalizations affect only your view of mail. No other user's view is changed because of your selection.

To personalize your view of mail:

1. In the Mail viewer, click the drop-down list ([Figure 13–9](#)).

Figure 13–9 Mail Personalization Menu

2. Select a display option from the available options:
 - **All**—to show all messages
 - **Today**—to show all messages received today
 - **Since Yesterday**—to show all messages received yesterday and today
 - **This Week**—to show all messages received in this calendar week
 - **This Month**—to show all messages received in this calendar month

The mail view refreshes, displaying only those messages that match your selection.

13.4.3 Opening Mail Messages

The messages that display in your mail are the same messages that display in your regular mail application inbox. You open them in the same way too. Note that the mail viewer does not render embedded images. If an email contains inline images, they are shown as attachments, and not within the message body.

To open a mail message:

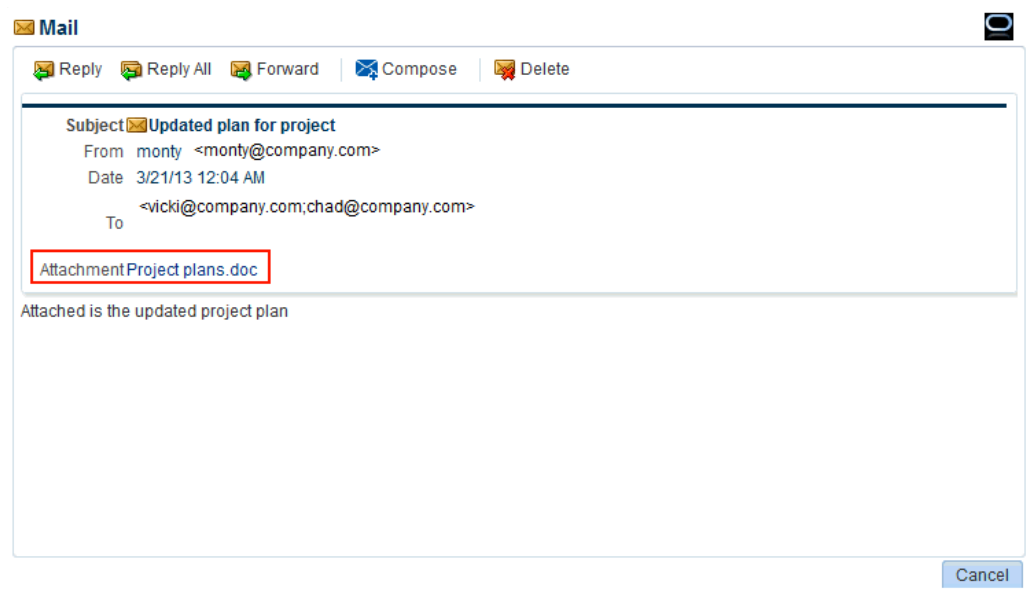
1. Click the link to the message you want to open.
2. After reading the message, click **Cancel** to close the message.

Note: HTML reports, tables, inline images (copy paste), and fonts viewed in a mail message may not render correctly. The Mail service requires HTML data to be well-formed to display as expected in a mail message.

The mail should show everything that your browser supports. However, some tags, like `<script>`, are encoded and disabled from execution.

13.4.4 Downloading Mail Attachments

Note that the mail viewer does not render embedded images. If an email contains inline images, they are shown as attachments, and not within the message body. Attachments display in mail messages as links (Figure 13–10).

Figure 13–10 Mail Attachment

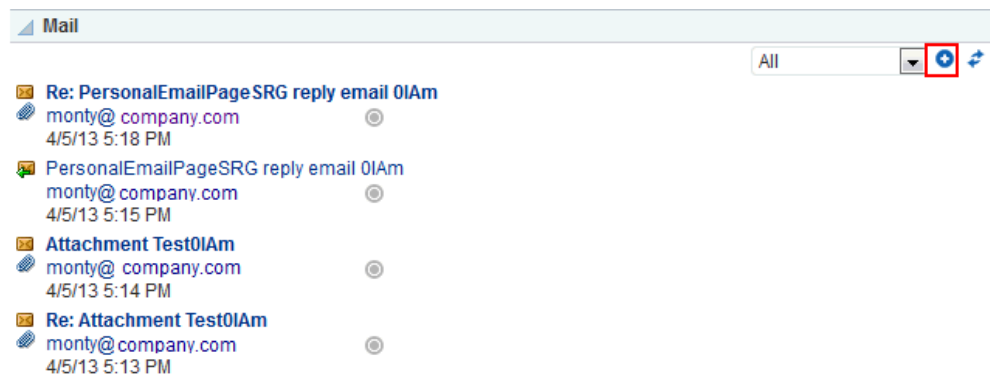
Accessing files associated with attachments is the same as accessing a file from any browser window. To view an attachment, click the link. Clicking an attachment link opens a download dialog that gives you the option of viewing the file in its native application or saving the file to a locally. This is browser behavior, so the behavior depends on the browser you use.

13.4.5 Composing and Sending Mail Messages

Whether you are composing and sending messages through WebCenter Portal's Mail or using your local mail client, it is the same as doing so in your regular mail application.

To compose and send a mail message:

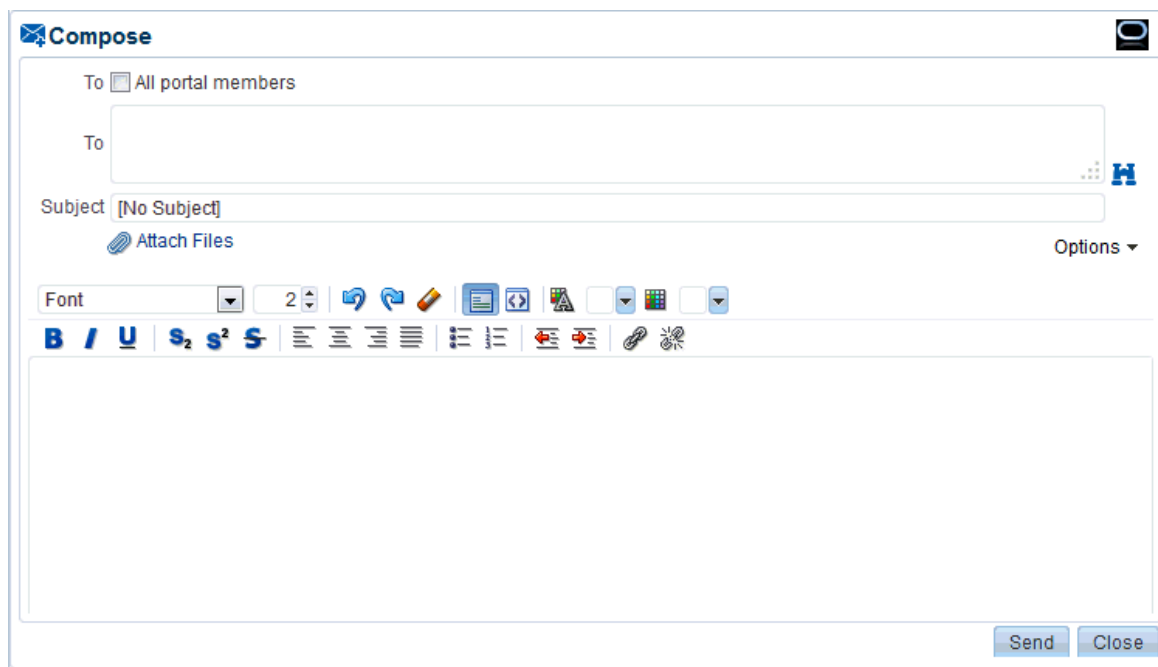
1. Click the **Compose** icon (Figure 13–11).

Figure 13–11 Compose Icon in Mail

2. In the **Compose** window (Figure 13–12), do one or both of the following:
 - Select **All portal members** to send mail to the entire distribution list containing all the users who are members of the portal

- Enter recipients in the **To** field. Separate multiple addresses with a comma (,)

Figure 13–12 Compose Window



3. Optionally, click the **Options** drop-down list (Figure 13–13):
 - Select **Show CC field**, **Show BCC field**, **Show Reply-to field** to include these fields in the message.
The Reply-to field is prepopulated with the user composing the mail (Figure 13–14), but it can be changed to any address.
 - Deselect **Use rich text editor** to compose the message in plain text, instead of the rich text editor. The Use rich text editor option is selected by default.
The selected options persist until they are changed.

Figure 13–13 Options in the Mail Compose Window

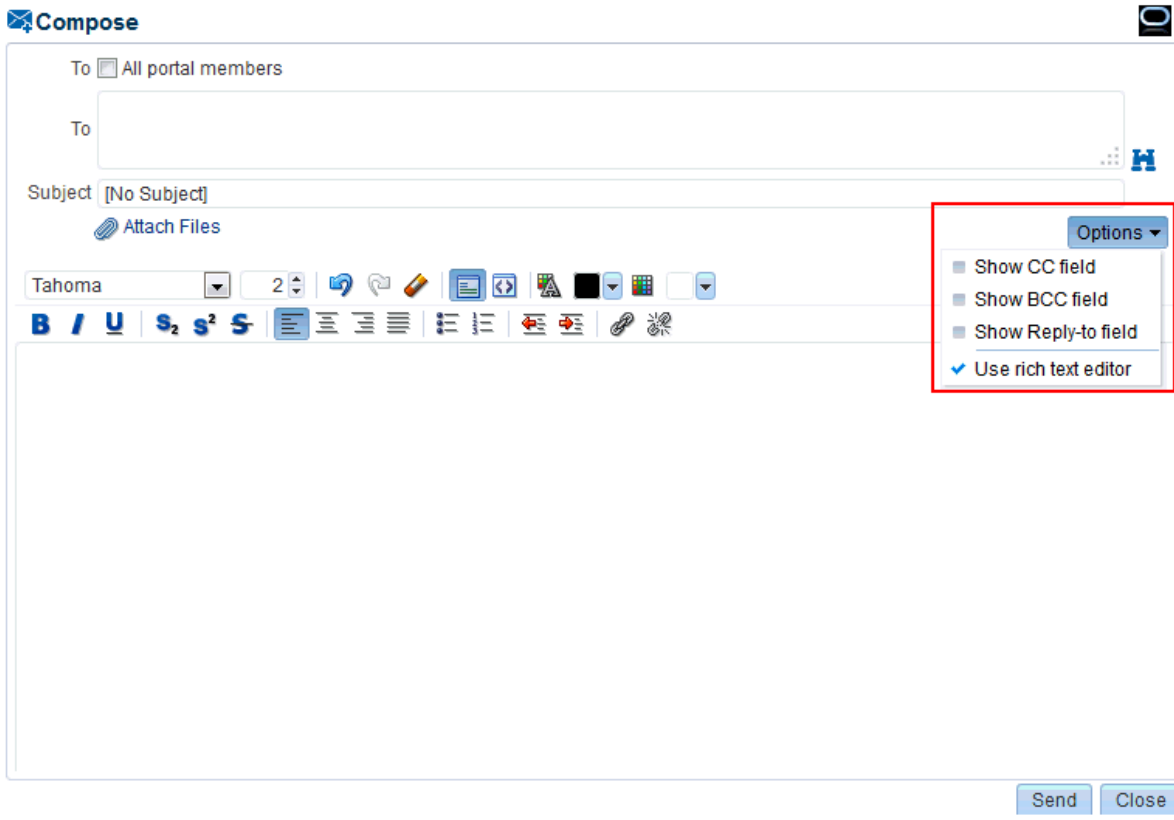
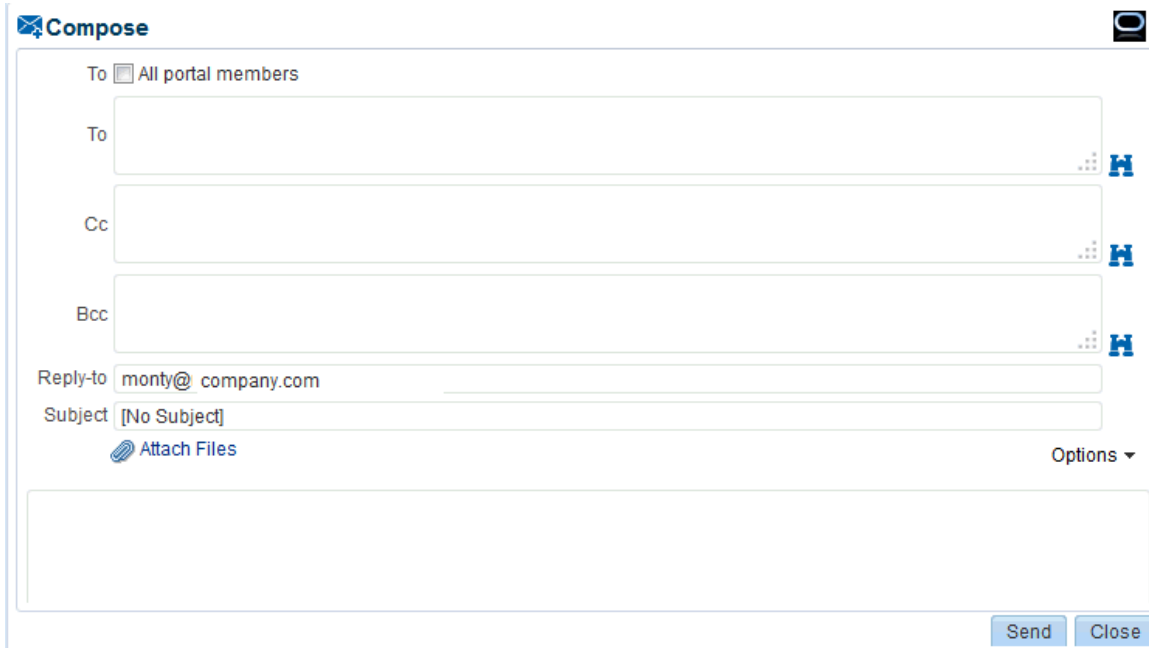


Figure 13–14 shows the compose window with the Cc, Bcc, and Reply-to fields added as well as the rich text editor removed.

Figure 13–14 Mail Compose Window with Different Options Selected



4. Optionally, click the **Find User** icon to find mail addresses (Figure 13–15).

The Compose window is directly connected to your mail server, so you can use the Find User icon to find mail addresses and contacts.

Figure 13–15 Find User Icon in a Compose Window



The Select User window appears. Enter a search term and click the Search icon.

Tip: For tips on searching with the **Find User** icon, see the "Searching for a User or Group in the Identity Store" section in *Building Portals with Oracle WebCenter Portal*.

5. In the **Subject** field, enter a subject for your message.
Enter up to 255 characters.
6. Compose your message in the message body.
7. Click **Send**.

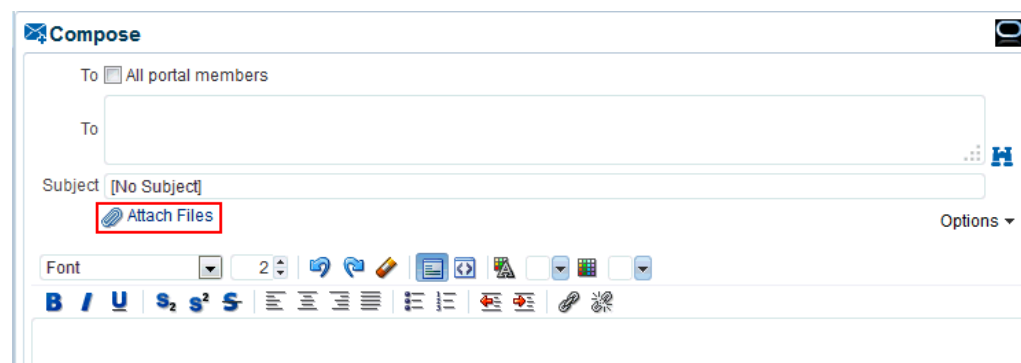
13.4.6 Sending Mail with Attachments

Just like your regular mail, you can send messages with attachments.

To send a mail with attachments:

1. Create a mail message as described in Section 13.4.5, "Composing and Sending Mail Messages."
2. In the **Compose** window, click the **Attach Files** link (Figure 13–16).

Figure 13–16 Attach Files Link



The **Add Attachment** window opens (Figure 13–17).

Figure 13–17 Add Attachment Window

3. Click **Browse** to locate and choose an attachment.
4. Click **Attach** to attach the selected file.

The file size must be greater than zero bytes but less than 2 MB. Zero-byte files do not get attached.

Note: It is recommended that you avoid attaching large files, as this causes the server to slow down or not respond. If you attach large files (greater than 2MB), then because of how the HTTP protocol handles attachments, the system reports an error only after reading all of the 2MB characters.

5. Repeat steps 3 and 4 to add additional attachments.

Attachments are listed under the **Attachments** heading in the **Add Attachment** window (Figure 13–18).

Figure 13–18 Attachments in the Add Attachment Window

A **Remove Attachment** icon appears next to each attachment (Figure 13–18). Click this to remove a selected attachment from the window.

6. Click the **Back to Compose** link to go back to the Compose window.
7. Click **Send**.

13.4.7 Removing Attachments from the Add Attachment Window

You can remove attachments from the **Add Attachment** window and from the **Compose** window:

- To remove mail attachments from the **Add Attachment** window, click the **Remove Attachment** icon next to the attachment you want to remove (Figure 13–19).

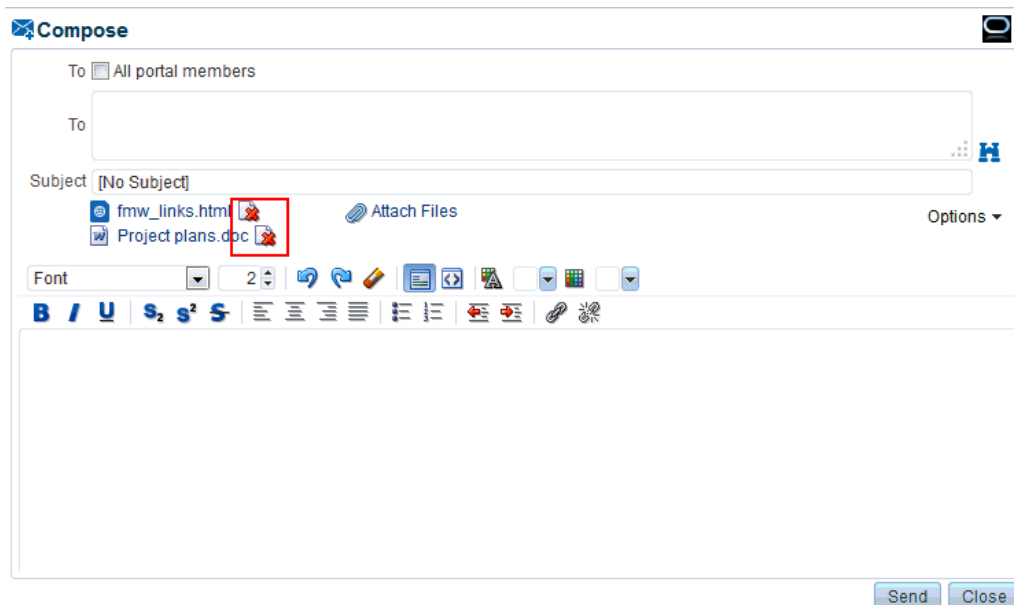
Figure 13–19 Remove Attachment Icon in the Add Attachment Window



For information about accessing the **Add Attachment** window, see [Section 13.4.6, "Sending Mail with Attachments."](#)

- To remove mail attachments from the **Compose** window, click the **Remove Attachment** icon next to the attachment you want to remove (Figure 13–20).

Figure 13–20 Remove Attachment Icon in the Compose Window



For information about accessing the **Compose** window, see [Section 13.4.5, "Composing and Sending Mail Messages."](#)

13.4.8 Replying To and Forwarding Mail

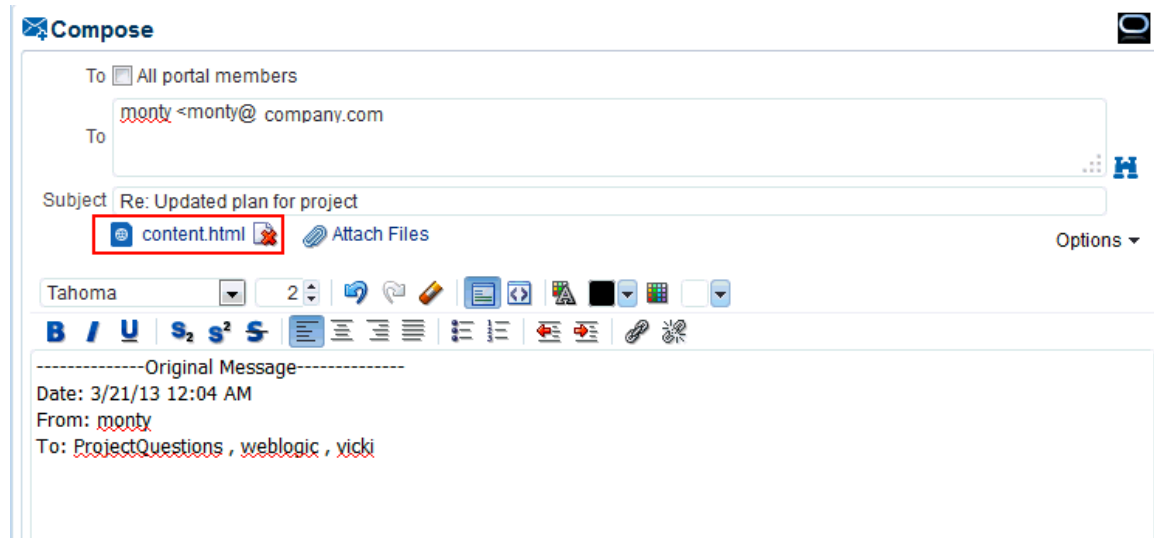
When you reply to or forward a mail message, the mail content is sent as an attached HTML file instead of being displayed in the mail message window (see [Figure 13–21](#)). Replying to and forwarding mail is as straightforward as in your regular mail application.

To reply to or forward a mail message:

1. Click the link to the message you want to reply to or forward.
2. Select one from the following options:
 - Click **Reply** to reply to the sender.
 - Click **Reply All** to reply to all recipients (including users who received a blind copy).
 - Click **Forward** to send the message on to a third party.

Notice that the original mail is an HTML attachment (Figure 13–21).

Figure 13–21 Original Mail Attached to a Mail Reply



3. In the **Compose** window that opens, select **All Portal Members** to send mail to the entire distribution list or enter recipients in the **To** field as you require.

Separate multiple entries with a comma (,).

Click the **Options** drop-down list to add Cc, Bcc, or Reply-to fields or to remove the rich text editor and use plain text.

The **Compose** window is directly connected to your mail server, so you can use the **Find User** icon to find mail addresses and contacts. Click the **Find User** icon and, in the resulting dialog, enter a search term for a user. For tips on searching for a user in the identity store, see the "Searching for a User or Group in the Identity Store" section in *Building Portals with Oracle WebCenter Portal*.

4. Optionally, revise the subject in the **Subject** field.
5. In the mail's message area, enter your reply or any forwarding message before or after the original message.
6. Optionally, add attachments as described in [Section 13.4.6, "Sending Mail with Attachments."](#)
7. Click **Send**.

The message is sent, and the original message reappears.

8. Click **Cancel** at the bottom of the original message to close the window.

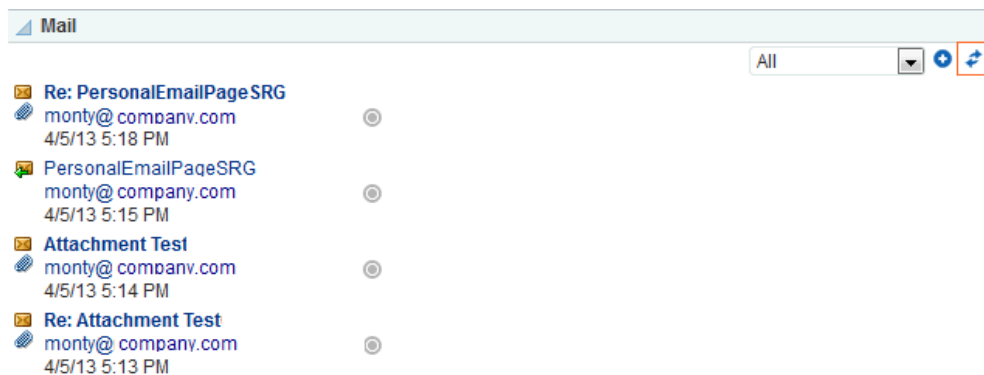
13.4.9 Refreshing Mail

You must refresh to check for new mail messages. Because the refresh operation triggers an event to the server to check for new mail, it may take a while to get new messages. Therefore, you may have to refresh a couple of times to display new mail.

To refresh mail, click the **Refresh** icon (Figure 13–22).

Note: Do not click the Reload or Refresh button in your browser. Click the **Refresh** icon to update your view.

Figure 13–22 Refresh Mail Icon



13.4.10 Deleting Mail

You can easily remove a message from your inbox.

To delete a mail message:

1. Open the message you want to delete (see Section 13.4.3, "Opening Mail Messages")
2. Click **Delete** at the top of the message (Figure 13–23).

Figure 13–23 Delete Icon in a Message Window



3. Click the **Refresh** icon in the Mail view to remove the message from the list (see Section 13.4.9, "Refreshing Mail").

Working with Feedback and the Message Board

This chapter describes Feedback viewers and Message Board for posting, viewing, and managing feedback and messages to and from your connections.

This chapter includes the following topics:

- [Section 14.1, "About Feedback"](#)
- [Section 14.2, "Setting Feedback Preferences"](#)
- [Section 14.3, "Viewing Feedback"](#)
- [Section 14.4, "Posting Feedback"](#)
- [Section 14.5, "Deleting Feedback"](#)
- [Section 14.6, "About Messages"](#)
- [Section 14.7, "Setting Message Preferences"](#)
- [Section 14.8, "Viewing Messages"](#)
- [Section 14.9, "Posting Messages"](#)
- [Section 14.10, "Editing Messages"](#)
- [Section 14.11, "Deleting Messages"](#)
- [Section 14.12, "Enabling Other Users to Post Feedback and Messages for You"](#)

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

14.1 About Feedback

Feedback provides a means of viewing, posting, and managing feedback between you and other users. To view your feedback, you must add a Feedback viewer to one of your personal pages (a page you created) in the Home portal. To receive feedback from other users, you must provide other users access to that personal page and set your feedback preferences to allow those users to view and/or post feedback for you. To view or post feedback for another user, you must be granted access to that user's personal page and access to view and/or post feedback for the user through that user's preferences.

For information on adding a Feedback viewer to a personal page and providing access to other users, see [Section 14.12, "Enabling Other Users to Post Feedback and Messages"](#)

for You."

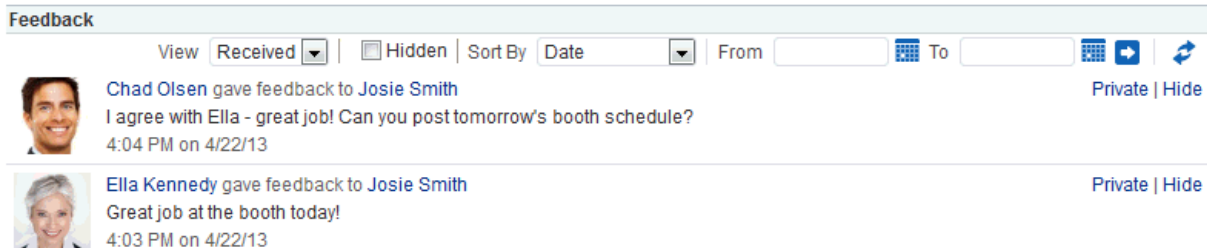
Notes:

- Before you access your view of Feedback or your Feedback preferences, your system administrator can set global application defaults that affect what all users may see and do with their own and other users' feedback.
 - In addition to being available in Feedback viewers, Feedback posts are streamed to the Activity Stream (unless your system administrator has configured the Activity Stream not to show feedback activity).
 - You can elect not to show Feedback activity in *your* view of the Activity Stream through your personal Activity Stream preferences. For more information, see [Section 24.3, "Setting Activity Stream Preferences."](#)
 - If feedback posts are streamed to the Activity Stream, be aware that even those feedback posts you mark *private* (so that it is shown only to you and the poster in *your* Feedback viewer) will still show up in the Activity Stream of your connections and the poster's connections.
-
-

WebCenter Portal provides the following Feedback views:

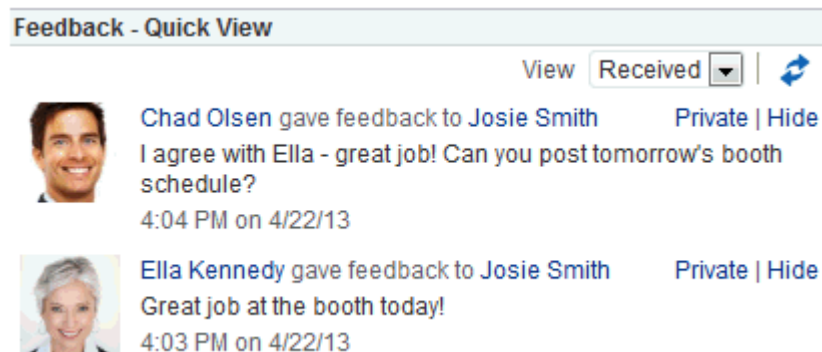
- **Feedback** for viewing, posting, and managing Feedback ([Figure 14–1](#))

Figure 14–1 Feedback



- **Feedback - Quick View** for viewing and posting Feedback ([Figure 14–2](#))

Figure 14–2 Feedback - Quick View



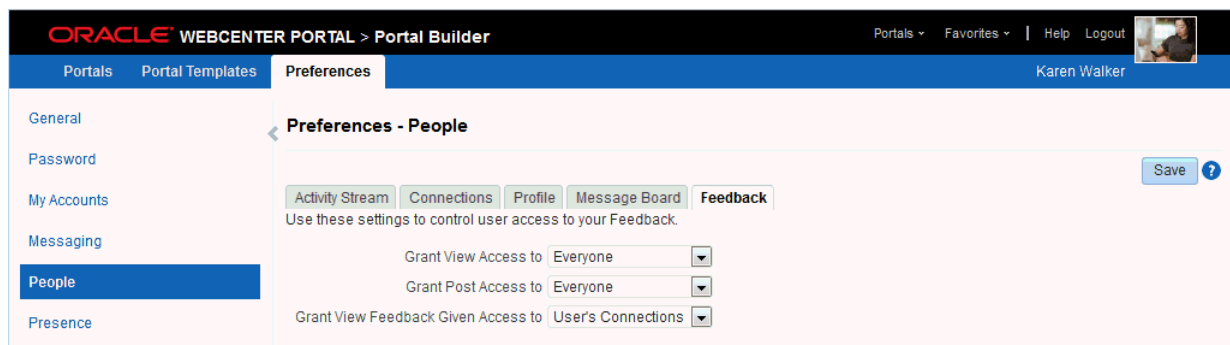
14.2 Setting Feedback Preferences

Use Feedback preferences to specify who can view the Feedback you have given and received and who can post Feedback in your Feedback views.

To set Feedback Preferences:

1. Open the Preferences page.
2. Click **People Connections** to display People Connections Preferences.
3. Click the **Feedback** tab to bring it forward (Figure 14–3).

Figure 14–3 Feedback Preferences



4. Set your Preferences for Feedback.

[Table 14–1](#) lists and describes each option.

Table 14–1 Feedback Preference Options

Option	Description
Grant View Access to	Select who can view Feedback given to you. <ul style="list-style-type: none"> ▪ Everyone—All users, including users who are not logged in, can view the Feedback you have given. ▪ Authenticated Users—Only users who are logged in can view the Feedback you have given. ▪ User's Connections—Only you and your Connections can view the Feedback you have given. ▪ User Only—Only you and the user for whom you have provided Feedback can view the Feedback you have given.
Grant Post Access to	Select who can provide Feedback to you. <ul style="list-style-type: none"> ▪ Everyone—All users, including users who are not logged in, can post Feedback messages to you. ▪ Authenticated Users—Only users who are logged in can post Feedback messages to you. ▪ User's Connections—Only you and your Connections can post Feedback messages to you. ▪ User Only—No one can post Feedback messages to you.
Grant View Feedback Given Access to	Select who can view Feedback you have received. <ul style="list-style-type: none"> ▪ Everyone—All users, including users who are not logged in, can view Feedback you have received. ▪ Authenticated Users—Only users who are logged in can view Feedback you have received. ▪ User's Connections—Only you and your Connections can view Feedback you have received. ▪ User Only—No one can view Feedback you have received.

5. Click **Save**.

14.3 Viewing Feedback

This section provides information about accessing the Feedback you have posted or received and hiding and unhiding posted Feedback. It includes the following sections:

- [Section 14.3.1, "Viewing Feedback You Have Posted or Received"](#)
- [Section 14.3.2, "Sorting and Filtering Feedback Posts"](#)
- [Section 14.3.3, "Hiding Feedback in Your Own View"](#)
- [Section 14.3.4, "Showing Hidden Feedback"](#)
- [Section 14.3.5, "Marking Feedback Received as Private"](#)

14.3.1 Viewing Feedback You Have Posted or Received

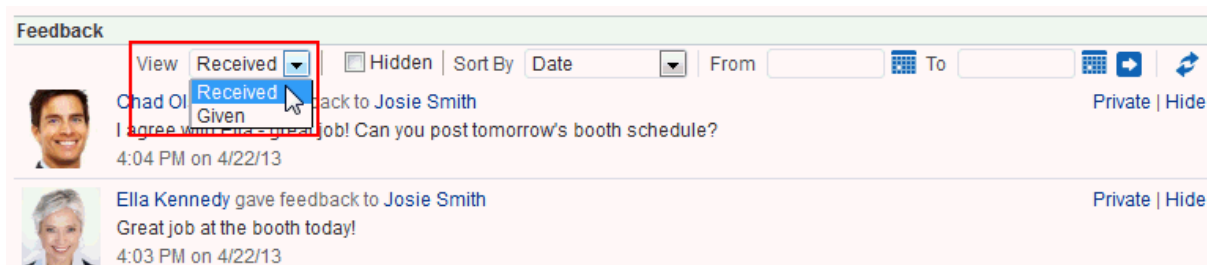
A **View** menu on Feedback viewers provides a means of accessing the Feedback you have posted for others and the Feedback you have received from others.

To view Feedback you have posted or received:

1. Go to the Feedback viewer in your Home portal.
2. Select an option from the **View** menu ([Figure 14–4](#)):

- **Given**—To view the Feedback you have posted for others
- **Received**—To view the Feedback others have left for you

Figure 14–4 Feedback View Menu



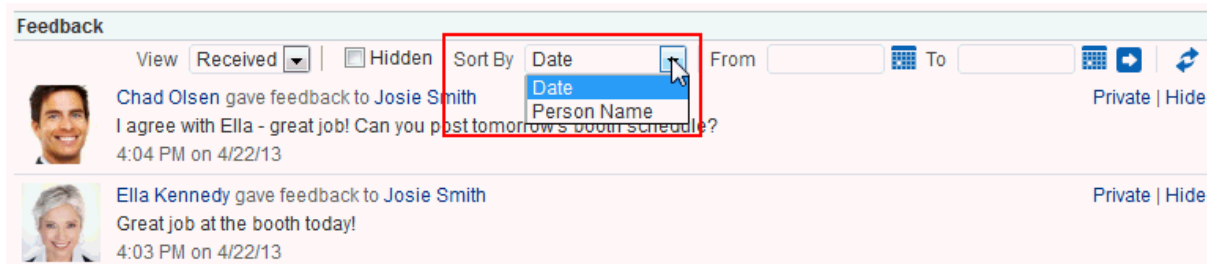
14.3.2 Sorting and Filtering Feedback Posts

The Feedback viewer includes sorting and filtering features for controlling what is shown in your view. Use the sorting feature to sort your Feedback by date or by person—that is, the user name of the person who left the Feedback. Use the filtering feature to display Feedback posted on a particular date or within a given date range.

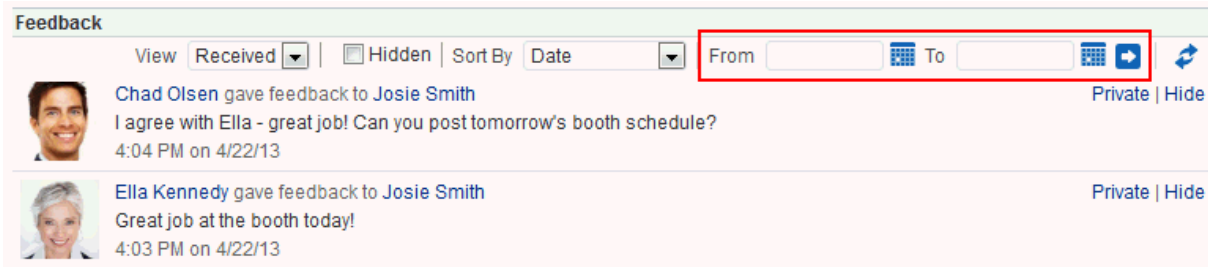
To sort and filter your Feedback:

1. Go to the Feedback viewer.
2. Select an option from the **Sort By** menu (Figure 14–5):

Figure 14–5 Sort By Menu on Feedback Viewer



- **Date**—To sort Feedback posts from the most recent to the oldest.
 - **Person Name**—To sort Feedback posts by the name of the user who left it for you (**View** is set to **Received**) or by the name of the user you left it for (**View** is set to **Given**).
3. To specify a date range, enter a start date in the field that follows **From** and enter an end date in the field that follows **To** (Figure 14–6).

Figure 14–6 Sort By Date Range Fields on Feedback Viewer

Tip: You must enter both a start and end date, even when you want to view Feedback posts from a given day. In such a case, enter the same date in both fields.

Instead of entering dates, you can click the **Select Date** icon next to a field to select a date from a calendar.

Accessibility Note: In WebCenter Portal, you cannot use the keyboard to select a date from the calendar that pops up when you click the **Select Date** icon. Instead, manually enter the date into the field.

4. Click the **Search** icon.

All of the Feedback posts (either received or given) that fall within the specified date range appear in the Feedback viewer.

Tip: To remove the date filtering criteria from your Feedback view, click the **Clear Date** icon.

14.3.3 Hiding Feedback in Your Own View

You can hide any Feedback in your own Feedback view. Hiding provides a means of removing Feedback posts from your own view without actually deleting them. Users to whom you have given access to your Feedback can still see the posts you have hidden.

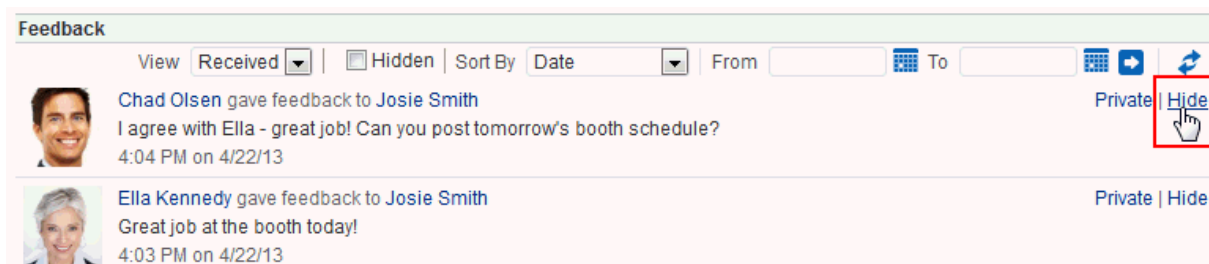
Notes:

- For information about undoing this action, see [Section 14.3.4, "Showing Hidden Feedback."](#)
- To hide a feedback post from everyone except you and the poster, mark the post as private. See [Section 14.3.5, "Marking Feedback Received as Private."](#)

To hide Feedback in your own view:

1. Go to the Feedback viewer in your Home portal.
2. Click the **Hide** link next to the Feedback message you want to hide ([Figure 14–7](#)).

Figure 14–7 Hide Link on a Feedback Message



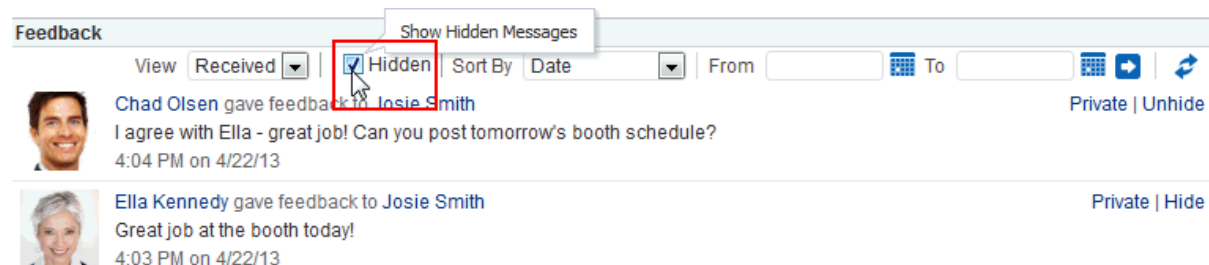
14.3.4 Showing Hidden Feedback

Use the **Hidden** check box on the Feedback viewer to show all the Feedback you have hidden. The **Hidden** check box provides a means of showing all hidden Feedback in one operation, making it available to be unhidden or deleted.

To show hidden Feedback posts:

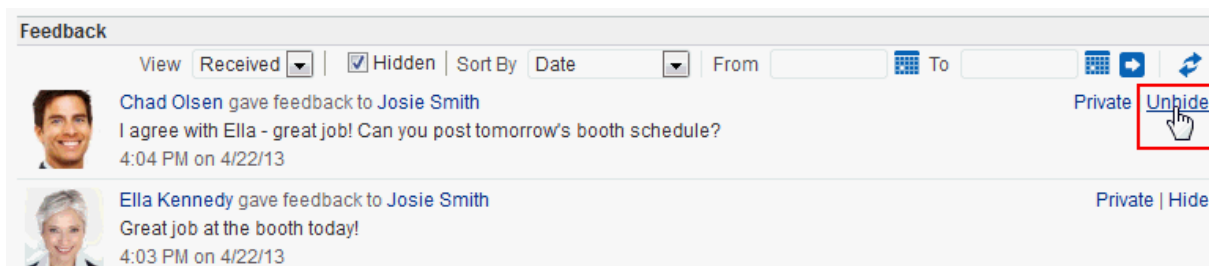
1. Go to the Feedback viewer in your Home portal.
2. Select the **Hidden** check box (Figure 14–8).

Figure 14–8 Hidden Check Box on a Feedback Viewer



3. All the Feedback posts you have hidden are shown.
4. Click the **Unhide** link to the right of the Feedback you want to show (Figure 14–9).

Figure 14–9 Unhide Link on a Feedback Viewer



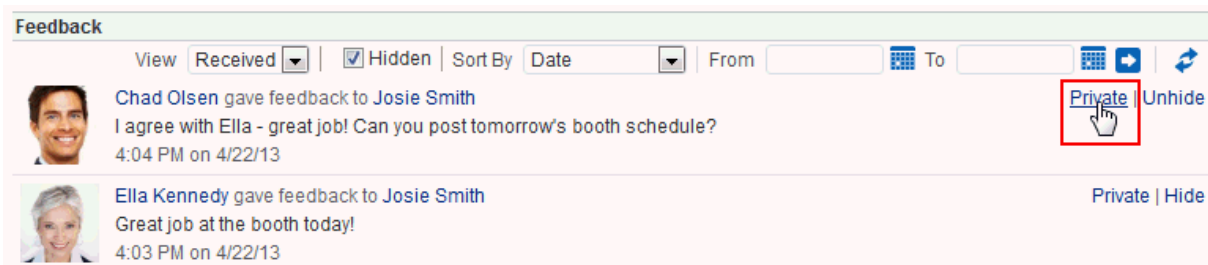
5. To remove hidden Feedback posts from your view, deselect the **Hidden** check box.

14.3.5 Marking Feedback Received as Private

You can mark Feedback you have received as private so that it shows only to you and the poster. To mark a post as private, click the **Private** link next to the post (Figure 14–10).

Notes:

- If you do not see portal the **Private** link, your portal moderator might have hidden the link.
- Unless Activity Stream is configured at the application level or the personal level (through Preferences) to omit Feedback activity, your connections and the poster's connections can still see private Feedback in their Activity Streams.
- For more information, see [Section 24.3, "Setting Activity Stream Preferences."](#)

Figure 14–10 Private Link on a Feedback Message

Your portal moderator can hide the **Private** link. Also, unless Activity Stream is configured at the application level or the personal level (through Preferences) to omit Feedback activity, your connections and the poster's connections can see even private Feedback in their Activity Streams.

See Also: For more information, see [Section 24.3, "Setting Activity Stream Preferences."](#)

14.4 Posting Feedback

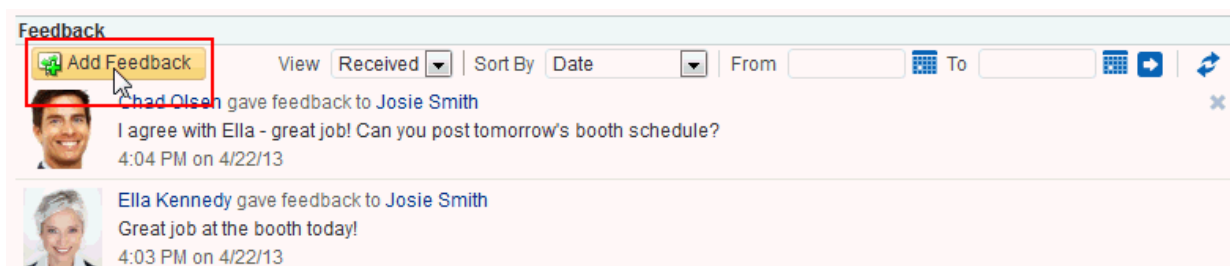
Use Feedback to pass along remarks to your connections about their efforts and results. Keep in mind that a wider audience than just your connections may see your Feedback message.

To post a Feedback message:

1. Go to the page the user has set up to receive Feedback.

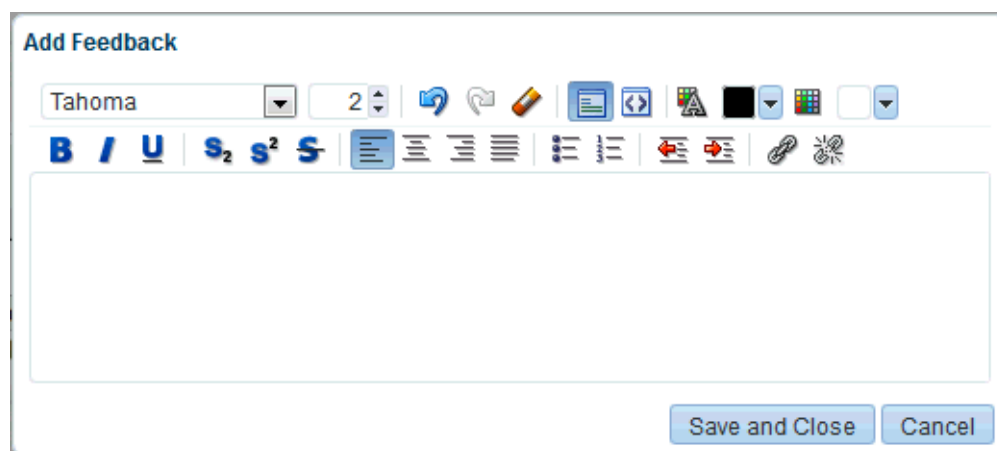
See Also: For more information, see [Section 14.12, "Enabling Other Users to Post Feedback and Messages for You."](#)

2. Click **Add Feedback** ([Figure 14–11](#)).

Figure 14–11 Add Feedback Button on a Feedback Viewer

3. In the resulting Add Feedback dialog, enter your Feedback in the text area (Figure 14–12).

Tip: The Add Feedback dialog provides an integrated rich text editor that enables you to add styles, links, and other HTML encoding to your Feedback.

Figure 14–12 Add Feedback Dialog with Rich Text Editor

4. When you finish entering text, click **Save and Close**.
Your Feedback appears in the selected user's Feedback view.

14.5 Deleting Feedback

You can delete Feedback you have posted to other users, provided your system administrator has enabled you to do so.

If Activity Stream is configured to show Feedback activity, deleted Feedback posts nonetheless continue to show in the Activity Stream of the recipient and all of your connections.

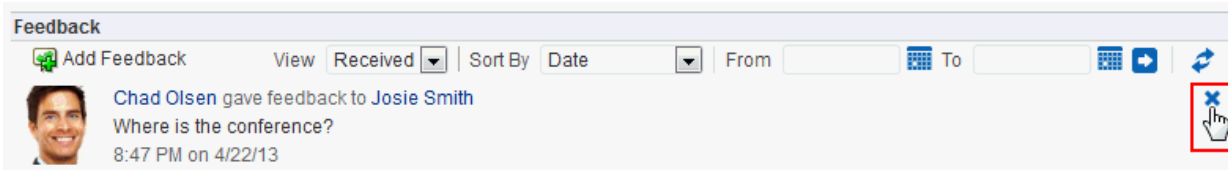
See Also: For information about configuring your personal Activity Stream Preferences, see [Section 24.3, "Setting Activity Stream Preferences."](#)

To delete Feedback you have posted:

1. Go to the Feedback viewer in your Home portal.
2. From the **View** menu, select **Given**.

3. Click the **Delete** icon next to the post you want to delete (Figure 14–13).

Figure 14–13 Delete Icon on a Feedback Message



4. Click **Delete** in the resulting confirmation dialog.

The Feedback is deleted from your view and from the view of the user for whom you left it.

14.6 About Messages

On personal pages in the Home portal, Message Board provides a means of viewing and posting messages to and from you and other users. To view your messages, you must add a Message viewer to one of your personal pages (a page you created) in the Home portal. To receive messages from other users, you must provide other users access to that personal page and set your message preferences to allow those users to view and/or post messages for you. To view or post 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.

For information on adding a Message Board viewer to a personal page and providing access to other users, see [Section 14.12, "Enabling Other Users to Post Feedback and Messages for You."](#)

In portals other than the Home portal, a Message Board viewer provides a means of viewing and posting messages within the scope of the portal. In a portal, every instance of a Message Board shows the same content: messages left by authorized users who are members of the portal. If you cannot perform actions in a portal Message Board, contact the portal moderator.

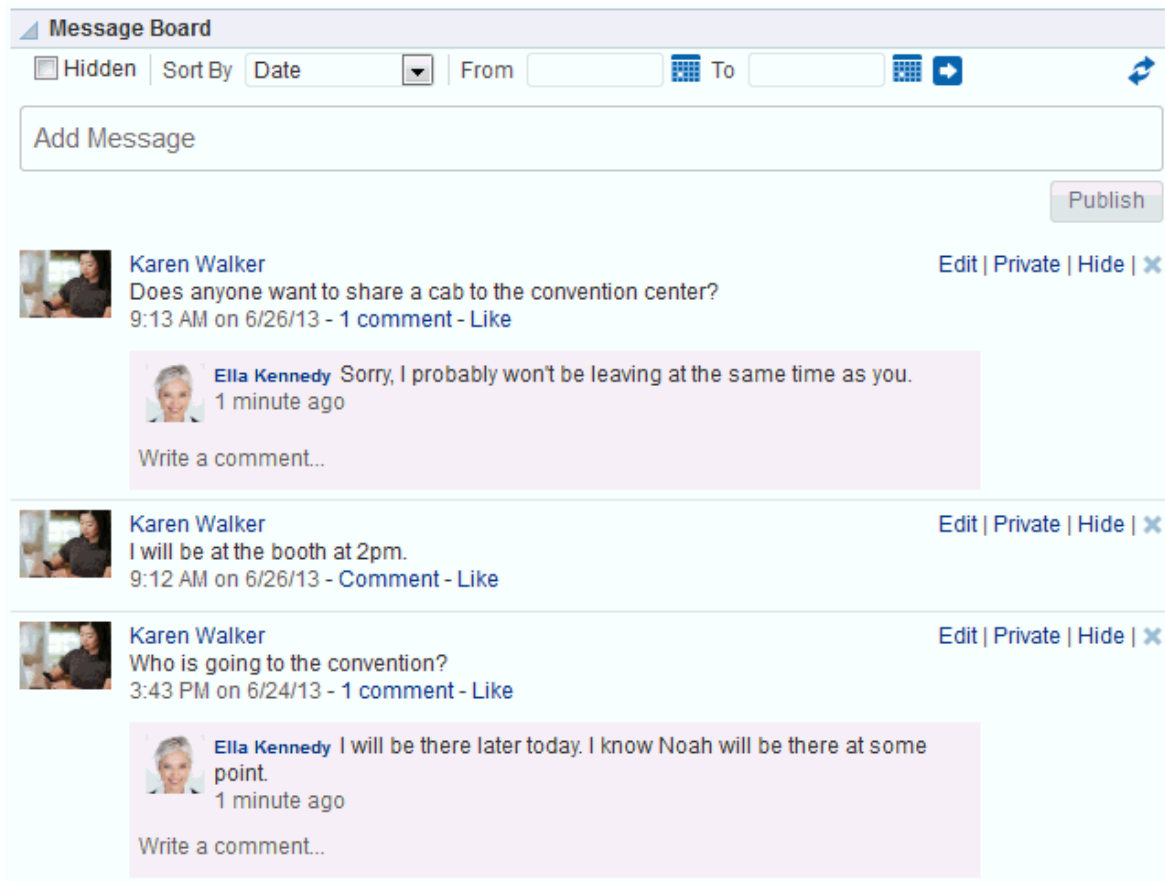
Notes:

- Before you access your view of Message Board or your Message Board preferences, your system administrator can set global application defaults that affect what all users may see and do with their own and other users' messages.
 - In addition to being available in Message Board viewers, messages are streamed to the Activity Stream (unless your system administrator has configured the Activity Stream not to show Message Board activity).
 - You can elect not to show Message Board activity in *your* view of the Activity Stream through your personal Activity Stream preferences. For more information, see [Section 24.3, "Setting Activity Stream Preferences."](#)
 - If messages are streamed to the Activity Stream, be aware that even those messages you mark *private* (so that it is shown only to you and the poster in *your* Message Board viewer) will still show up in the Activity Stream of your connections and the poster's connections.
-

WebCenter Portal provides the following Message Board views:

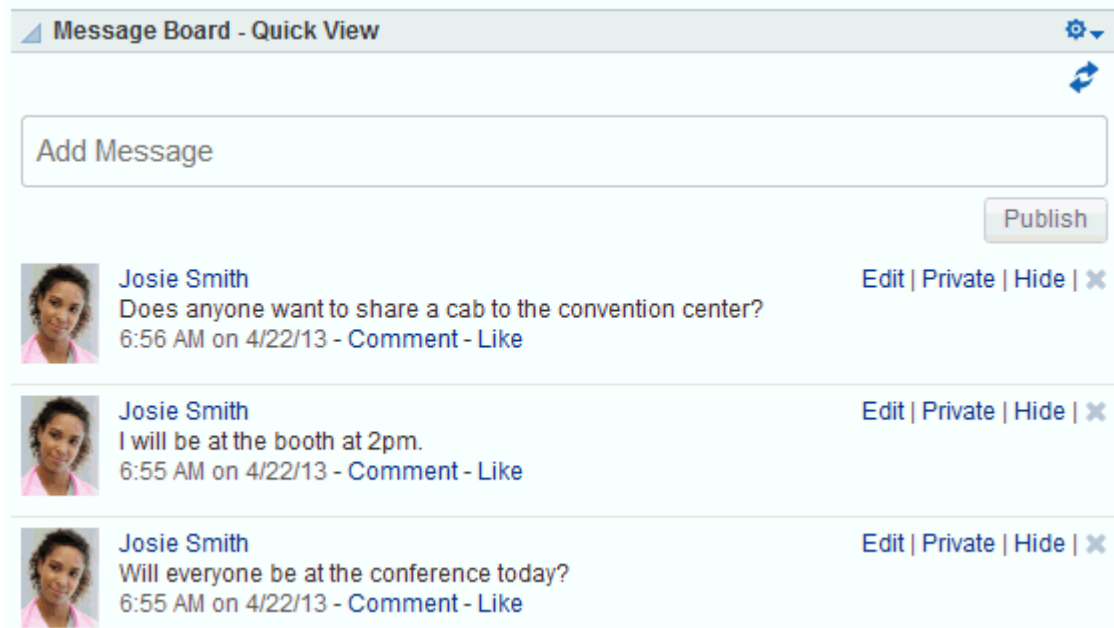
- **Message Board** for adding, viewing, updating, hiding, deleting, and managing your view of messages, and for marking messages as private and sharing private messages ([Figure 14-14](#))

Figure 14–14 Message Board



- **Message Board - Quick View** for adding, viewing, updating, hiding, and deleting messages, and for marking messages as private and sharing private messages (Figure 14–15)

Figure 14–15 Message Board - Quick View



See Also: Publisher has many qualities in common with Message Board, but is a separate feature. For more information about Publisher, see [Chapter 15, "Liking, Commenting On, and Sharing Items in WebCenter Portal."](#)

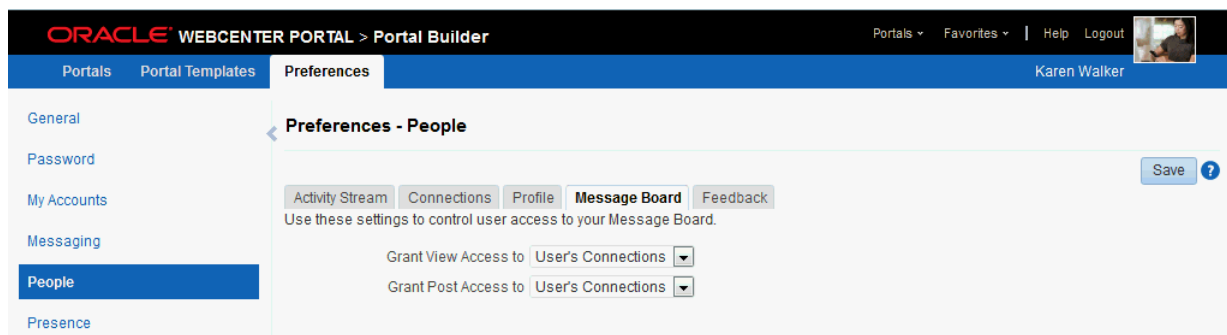
14.7 Setting Message Preferences

Use Message Board preferences to specify who can view and post to your Message Board.

To set Message Board Preferences:

1. Open the Preferences page.
2. Click **People Connections** to display People Connections Preferences.
3. Click the **Message Board** tab to bring it forward ([Figure 14–16](#)).

Figure 14–16 Message Board Preferences



4. Set your Preferences for the Message Board.
[Table 14–2](#) lists and describes each option.

Table 14–2 Message Board Preference Options

Option	Description
Grant View Access to	Select who can view your Message Board: <ul style="list-style-type: none"> ■ Everyone—All users, including users who are not logged in, can view your Message Board messages. ■ Authenticated Users—Only users who are logged in can view your Message Board messages. ■ User's Connections—Only you and the users you your Connections can view your Message Board messages. ■ User Only—Only you can view your Message Board messages.
Grant Post Access to	Select who can post messages to your Message Board: <ul style="list-style-type: none"> ■ Everyone—All users, including users who are not logged in, can post messages to your Message Board. ■ Authenticated Users—Only users who are logged in can post messages to your Message Board. ■ User's Connections—Only you and your Connections can post messages to your Message Board. ■ User Only—Only you can post messages to your Message Board.

5. Click **Save**.

14.8 Viewing Messages

Once you and your connections have set up your own Message Boards, you can see your own and, potentially, each other's messages. This section provides information about how to view each other's messages post-set-up. It includes the following subsections:

- [Section 14.8.1, "Viewing Messages Others Have Left for You"](#)
- [Section 14.8.2, "Viewing Messages Others Have Received"](#)
- [Section 14.8.3, "Viewing Messages Sent to a Selected Portal"](#)

Tip: For information about setting up your view of Message Board, see [Section 14.12, "Enabling Other Users to Post Feedback and Messages for You."](#)

14.8.1 Viewing Messages Others Have Left for You

To view Message Board messages other users have left for you, go to the personal page in the Home portal that you have set up to receive Message Board messages ([Figure 14–14](#)).

14.8.2 Viewing Messages Others Have Received

To view Message Board messages other users have received (including those you have left for them), go to the page the user has made available to you in your view of the Home portal. You can access this page through the **Personalize Pages** page. For more information, see [Section 9.2, "Opening a Page in the Home Portal."](#)

14.8.3 Viewing Messages Sent to a Selected Portal

Message Boards placed in a portal provide a means of viewing and posting messages within the portal context. All default Message Board views within a given portal display the same content: messages left by authorized users who are members of the portal. All users with access to the portal can see the posted messages.

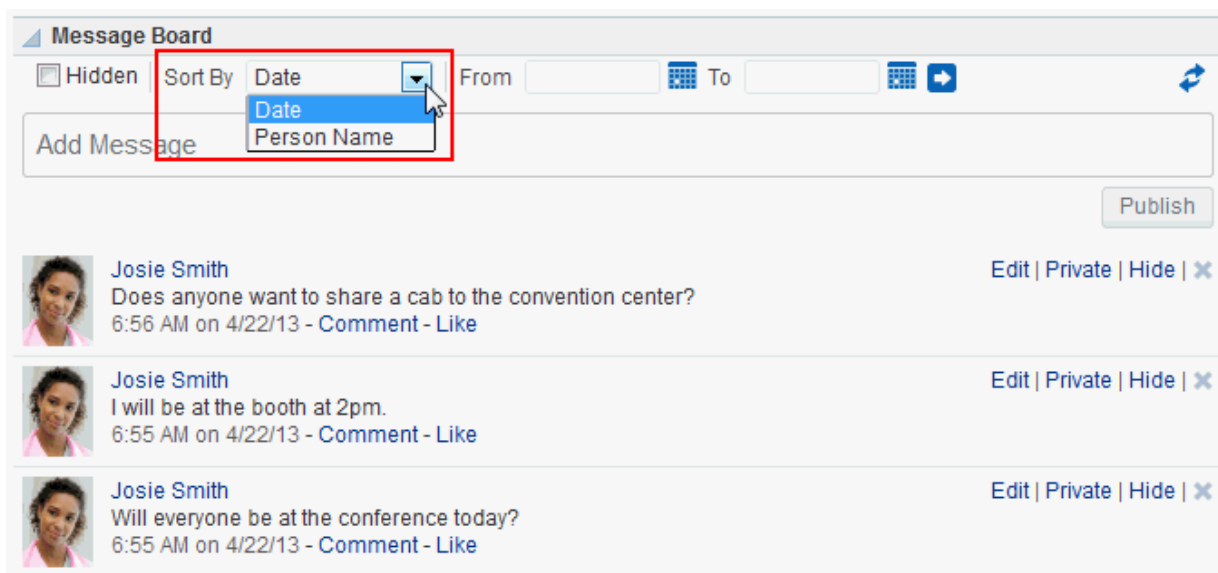
14.8.4 Sorting and Filtering Message Board Messages

Your full view of the Message Board includes sorting and filtering features for managing your view of your messages. Use the sorting feature to sort your messages by date or by the person who left the message. Use the filtering feature to show messages posted on a particular date or within a given date range.

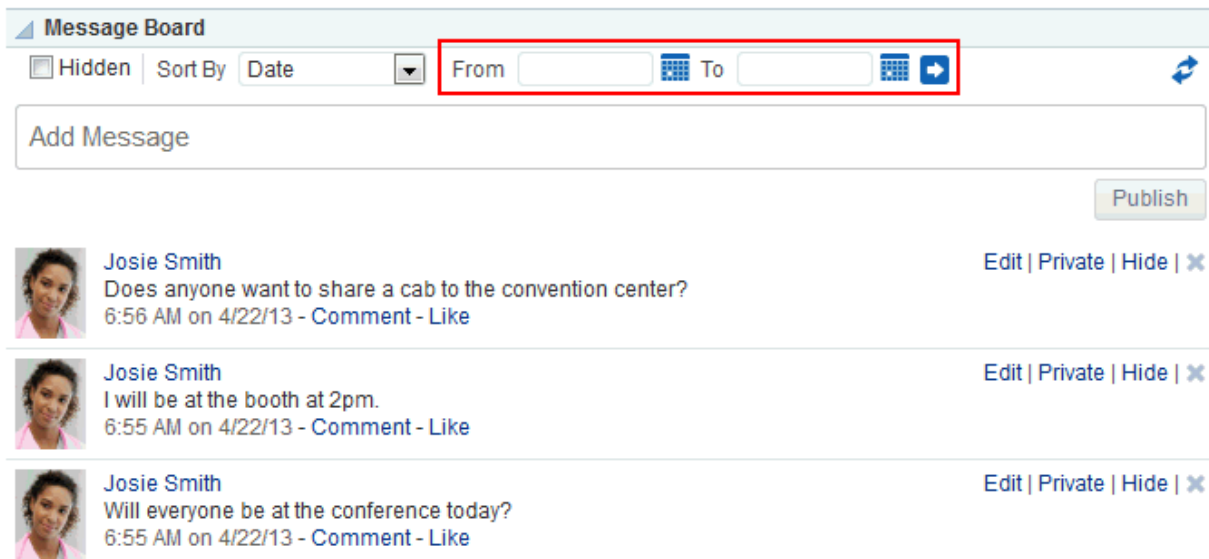
To sort and filter your Message Board messages:

1. Go to the Message Board viewer.
2. From the **Sort By** menu, select a sorting option (Figure 14–17):

Figure 14–17 Options on Sort By Menu



- **Date**—Sort your messages by the date they were posted, from most recent to oldest.
 - **Person Name**—Sort your messages by the user name of the person who posted them, from A to Z.
3. To show messages between a particular range of dates, enter the beginning and end of the range respectively in the fields after **From** and **To** (Figure 14–18).

Figure 14–18 Sort By Date Range Options

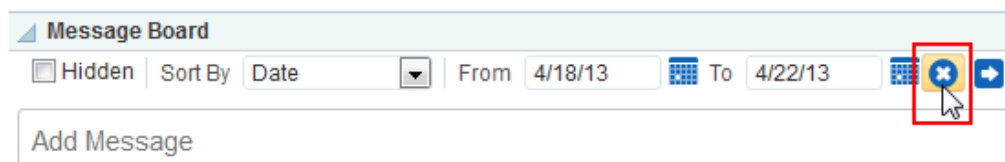
Tip: Instead of entering dates, you can click the **Select Date** icon next to a field to select a date from a calendar.

Accessibility Note: In WebCenter Portal, you cannot use the keyboard to select a date from the calendar that pops up when you click the **Select Date** icon. Instead, manually enter the date into the field.

4. Click the button to the right of the fields to apply the filter.

The Message Board refreshes, showing only those messages that fit your sorting and filtering criteria.

Tip: To remove the date filtering criteria from your Message Board view, click the **Clear Date** icon that appears to the right of the date range fields after you filter by date.

Figure 14–19 Clear Date Icon

14.8.5 Hiding Messages in Your View of Message Board

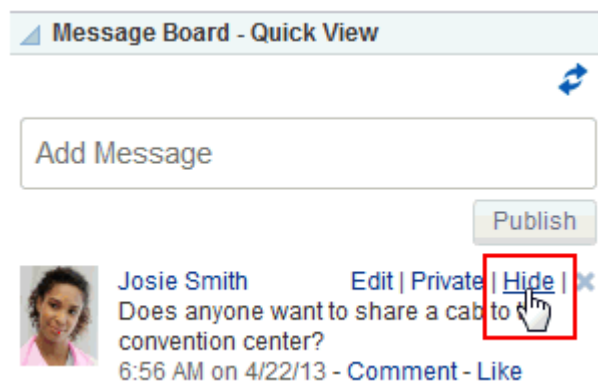
You can hide messages in your Message Board in one of two ways: you can hide a specific message or hide public or private messages. Hiding provides a means of removing messages from your own view without actually deleting them. It is a non-permanent way to reduce the visual clutter of your Message Board view.

Note: Users to whom you have given access to your messages can still see the messages that you have hidden.

To hide a specific message in your view of the Message Board:

1. Go to the message you want to hide in your view of the Message Board.
2. Click the **Hide** link next to the message you want to hide (Figure 14-20).

Figure 14-20 Hide Link on a Message




The message is hidden in your view of the Message Board. Other users you have permitted to view your Message Board can see this message when they visit your view.

To hide messages of a particular type (private or public) in your view of the Message Board:

1. Open the page editor (Composer) for the personal page in the Home portal that includes the Message Board.

See Also: For more information, see [Section 9.5, "Editing a Personal Page."](#)

2. In Design view (the default view when you edit a page), click the Edit icon () on the Message Board viewer to open the Component Properties dialog.

See Also: Editing component properties is an advanced task. For more information about editing component properties, see the "Setting Properties on a Component" section in *Building Portals with Oracle WebCenter Portal*.

3. In the Component Properties dialog, on the **Parameters** tab, from the **Message Type** drop-down list, select the type of messages you want to see in your view of the Message Board:
 - **All** - (default) Displays both public and private messages.
 - **Public** - Displays only public messages.
 - **Private** - Displays only private messages.
4. Click **Save** to save the page.
5. Click **Close** to exit page edit mode.

Messages of the selected type appear in your view of the Message Board; all other messages are hidden in your view of the Message Board. Other users you have permitted to view your Message Board can see all messages when they visit your view.

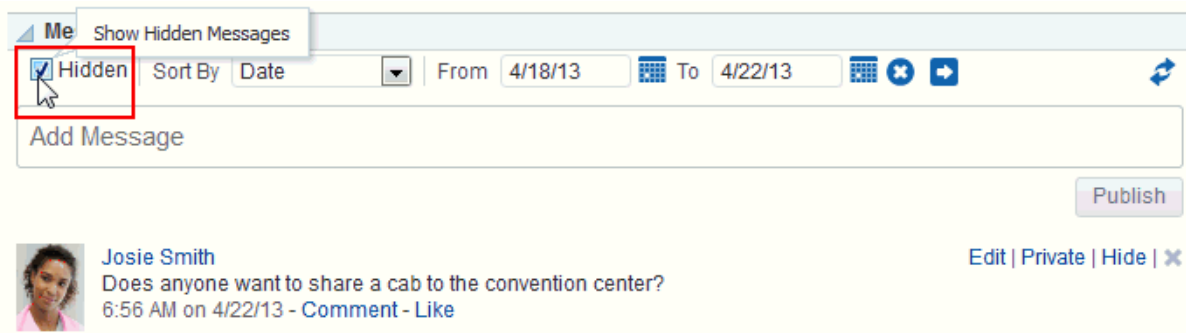
14.8.6 Showing Hidden Messages

Use the **Hidden** check box on the Message Board to show all of the messages you have hidden. The **Hidden** check box provides a means of showing all hidden messages in one operation, making it available to be unhidden or deleted.

To show hidden Message Board messages:

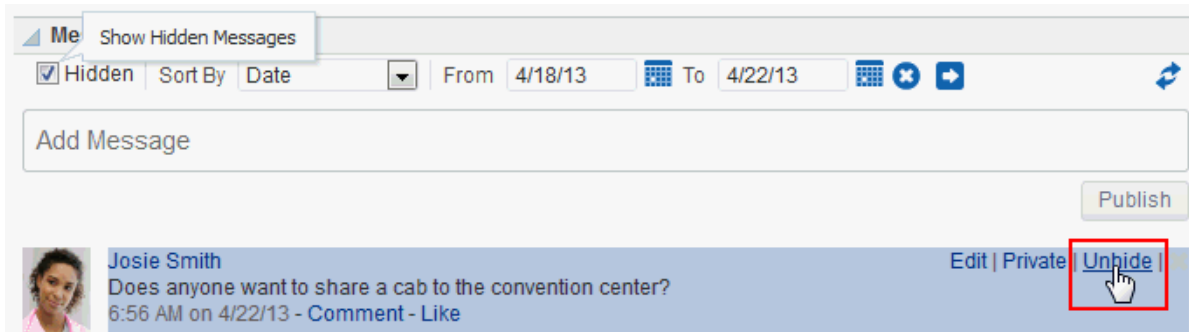
1. In your view of the Message Board, select the **Hidden** check box to show the messages you have hidden (Figure 14–21).

Figure 14–21 Hidden Check Box on a Message Board Viewer



2. Click the **Unhide** link next to the message you want to show (Figure 14–22).

Figure 14–22 Unhide Link on a Message Board Viewer



3. Optionally, deselect the **Hidden** check box to hide the messages that are still marked as hidden.

14.9 Posting Messages

This section describes the various ways you can post messages and attachments. It includes the following subsections:

- Section 14.9.1, "Posting a Message Through Message Board"
- Section 14.9.2, "Posting a Private Message"
- Section 14.9.3, "Sharing a Private Message"

14.9.1 Posting a Message Through Message Board

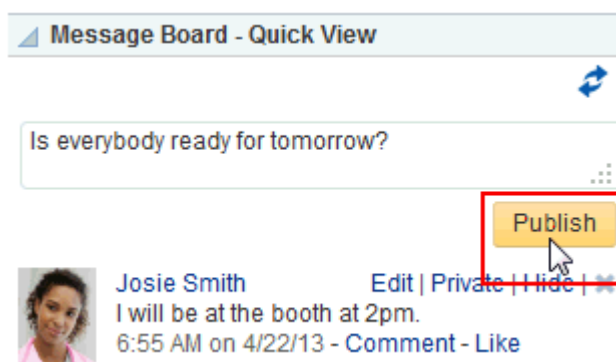
This section describes how to post a message to all of your connections through Message Board.

See Also: For information about Connections, see [Chapter 11, "Managing Your Contacts."](#)

To post a Message Board message:

1. Go to a Message Board view.
2. In the text box, enter a message.
3. Click **Publish** ([Figure 14-23](#)).

Figure 14-23 Publish Button on a Message Board View



The message appears in all of your connections' views of Message Board and Activity Stream.

14.9.2 Posting a Private Message

Provided you are authorized to do so, you can post a private message to any of your connections. When you mark a message as *private*, only you and the recipient can see the message in your views of Message Board; however, all of your connections and all of the recipient's connections can see private messages in Activity Stream, unless the application is configured to omit Message Board activity from the Activity Stream or you have configured your Activity Stream preferences to do so.

See Also: For more information, see [Section 24.3, "Setting Activity Stream Preferences."](#)

To post a private message:

1. Go to your **My Profile** page and click **Connections** to bring it forward.

Tip: If necessary, set the **Show** menu to **All Connections**.

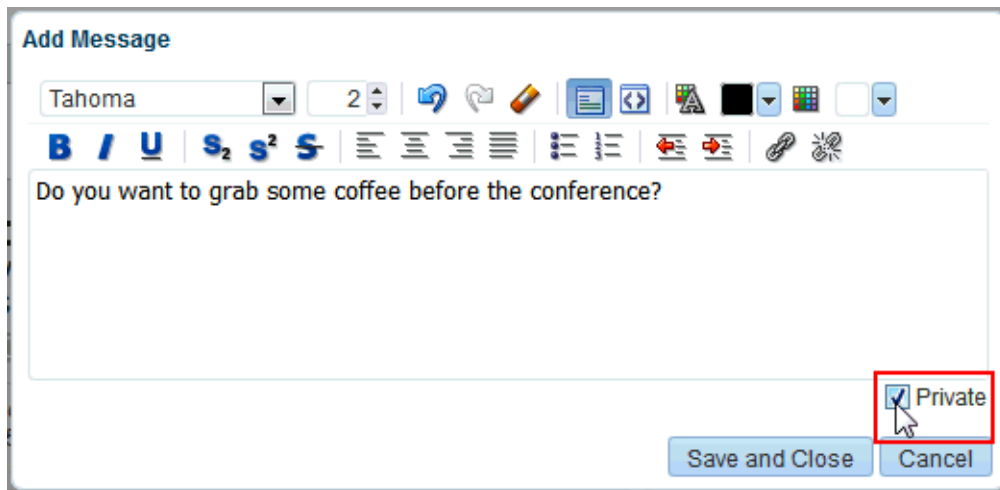
2. Click the name of the user to whom you want to send a private message. In the Profile popup, click **Add Message** ([Figure 14-24](#)).

Figure 14–24 Add Message Link in Profile Popup



3. Enter your message in the Add Message dialog (Figure 14–25).

Figure 14–25 Add Message Dialog



4. Select the **Private** check box to allow only the recipient to see the message.
5. Click **Save and Close** when you have finished.

The message appears in the recipient's views of Message Board and Activity Stream.

14.9.3 Sharing a Private Message

When you receive a private message, you can opt to share that message with all users who have access to your Message Board by marking it as *shared*. When someone sends you a message marked *private*, only you and the sender can see it in the Message Board (though all of your connections and the sender's connections can see the message in their Activity Streams, unless the Activity Stream is configured to omit Message Board activity).

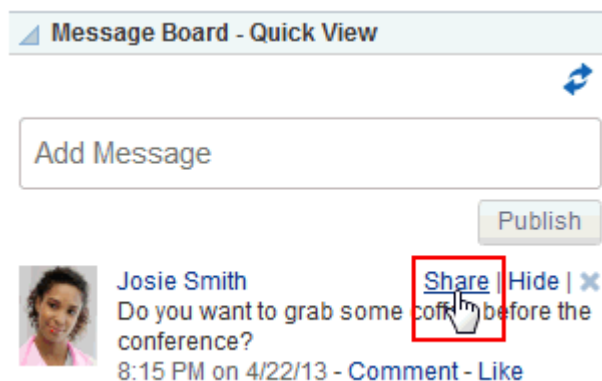
See Also: For information about omitting certain types of activities from Activity Stream at the application and personal levels, see [Section 24.3, "Setting Activity Stream Preferences."](#)

When you mark a private message as shared, you open it up to those permitted to see your view of the Message Board.

To mark a message as shared:

1. Go to the message you want to mark as shared in your view of the Message Board.
2. Click the **Share** link next to the relevant message ([Figure 14–26](#)).

Figure 14–26 Share Link on a Private Message



The message can be viewed by everyone who can access your Message Board.

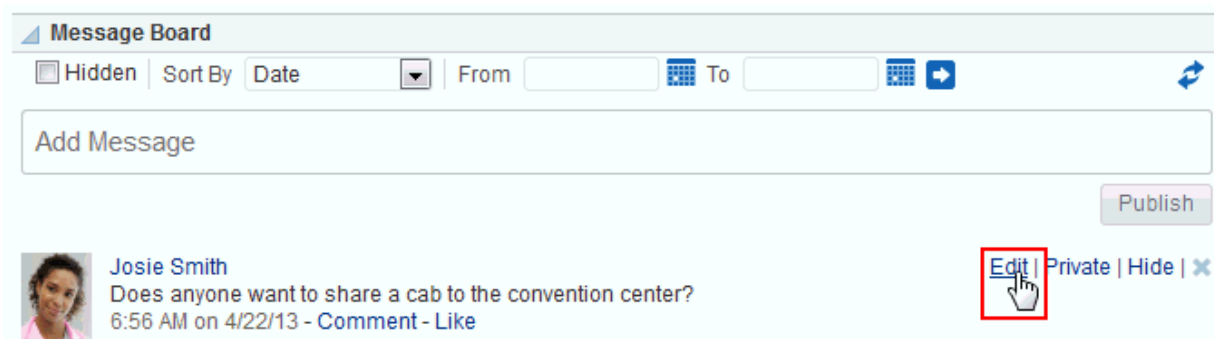
14.10 Editing Messages

Your system administrator can configure the Message Board feature to enable users to revise the messages they leave. Provided this permission is in place, you can edit any message you post.

To edit a Message Board message:

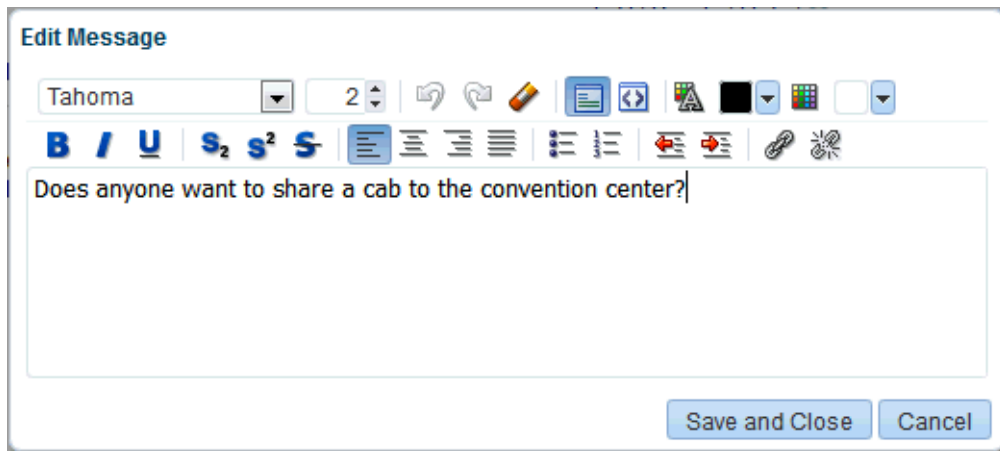
1. Go to the message you want to edit.
2. Click the **Edit** link associated with the message ([Figure 14–27](#)).

Figure 14–27 Edit Link on a Message



The Edit Message dialog opens with a rich text editor pre-populated with your message text (Figure 14–28).

Figure 14–28 Edit Message Dialog



3. Revise your message, and click **Save and Close**.

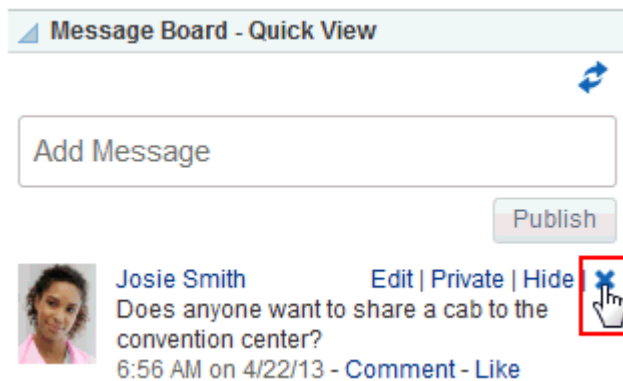
14.11 Deleting Messages

Your system administrator can configure the Message Board to allow users to delete the messages they send. Provided this permission is in place, you can delete any message you send.

To delete a message you sent:

1. Go to your view of the Message Board, and click the **Delete** icon next to the message you want to delete (Figure 14–29).

Figure 14–29 Delete Icon on a Message



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

14.12 Enabling Other Users to Post Feedback and Messages for You

To set up your Feedback and Message Board viewers so that users can post feedback and messages specifically for you, you must add a Feedback or Message Board viewer to a personal page in your view of the Home portal, and share that page with your

connections. Additionally, you must set a parameter on the Feedback or Message Board viewer to identify yourself as the viewer owner. After this is set up, your connections can access this page and post messages and feedback for you. This section steps you through this process.

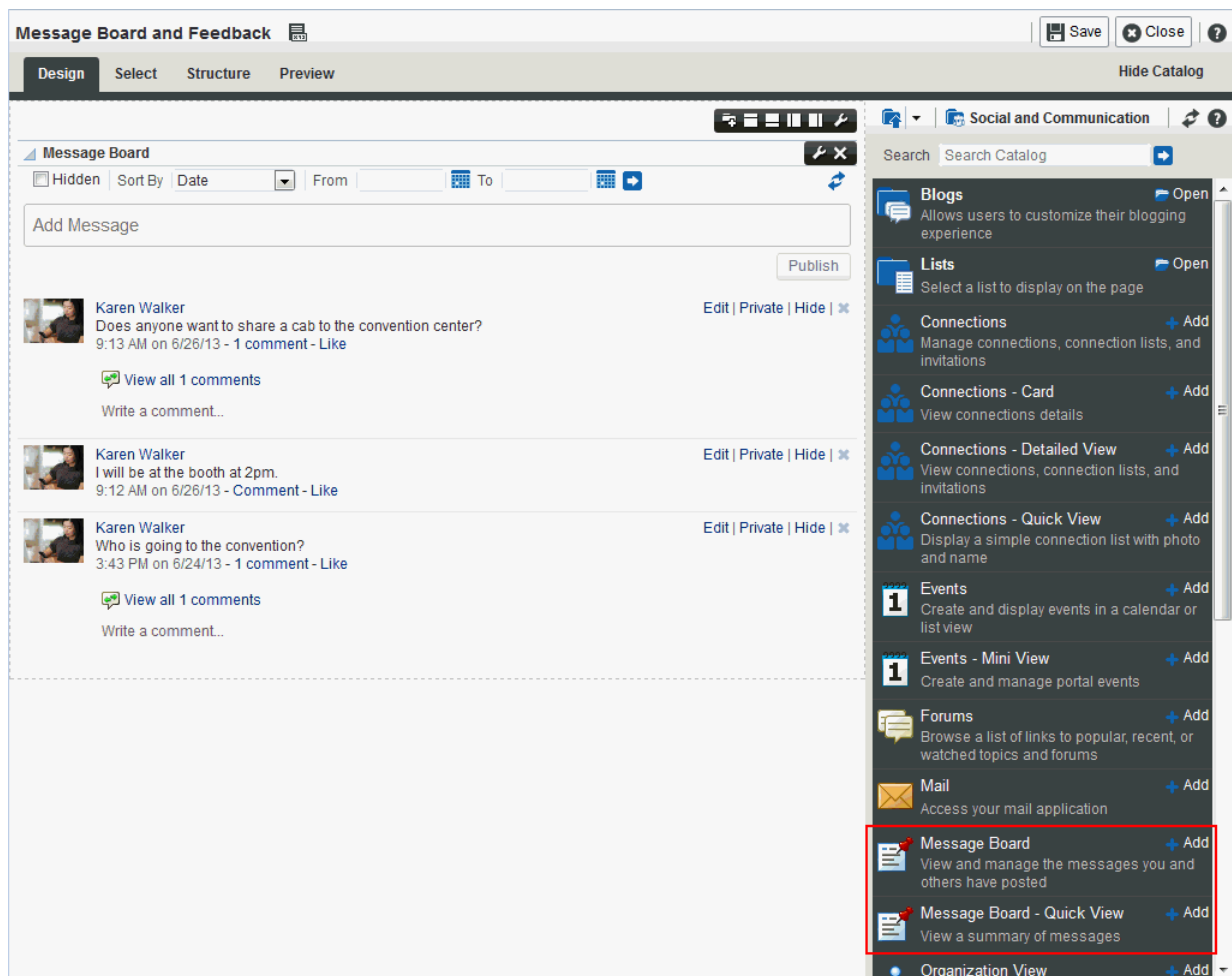
To enable other users to post feedback and messages for you:

1. Create a new personal page or edit an existing personal page in the Home portal to which to grant access to your connections.

See Also: For more information, see [Section 9.3, "Creating a Personal Page in the Home Portal"](#) or [Section 9.5, "Editing a Personal Page."](#)

2. In Design view (the default view when you edit a page), find the Feedback or Message Board viewer to add to the page, and click **Add**.


Figure 14–30 Message Board Viewers in Composer



Notes:

- The Message Board viewers are stored in the **Social and Communication** folder by default.
 - Your system administrator must add the Feedback viewers to a resource catalog to make them available to you.
-
-

See Also: Editing a personal page is no different than editing a page in a portal, but it is an advanced task. For more information about adding a viewer, see the "Editing a Page" section in *Building Portals with Oracle WebCenter Portal*.

3. Click the Edit icon () on the viewer to open the Component Properties dialog.

See Also: Editing component properties is an advanced task. For more information about editing component properties, see the "Setting Properties on a Component" section in *Building Portals with Oracle WebCenter Portal*.

4. In the Component Properties dialog, on the **Parameters** tab, enter your user name in the required field:
 - For Feedback, enter your user name in the **Resource Id** text box.
 - For Feedback - Quick View, enter your user name in the **User Id** text box.
 - For Message Board and Message Board - Quick View, enter your user name in the **User Name** text box.

See Also: Editing component properties is an advanced task. For more information about other component properties, see the "Setting Message Board and Feedback Task Flow Properties" section in *Building Portals with Oracle WebCenter Portal*.

5. Click **Save** to save the page.
6. Click **Close** to exit page edit mode.
7. Set page access to enable other users to view the page as described in [Section 9.6, "Setting Security for a Personal Page."](#)

Tip: When you share one of your personal pages in the Home portal with other users, the shared page appears on their **Personalize Pages** page. The other users can then use controls on the **Personalize Pages** page to show the page in their own view of the Home portal.

8. Set your preferences to allow users to view and/or post feedback and/or messages for you. For more information, see [Section 14.2, "Setting Feedback Preferences"](#) and [Section 14.7, "Setting Message Preferences."](#)

All users who have access to the page see the Feedback or Message Board viewers that you place there, but only the users to whom you have granted access, through preferences, see any content in the components.

You might want to send a link to this page to the users to whom you granted access, inviting them to leave you feedback or messages. For more information, see [Section 9.13, "Sending Mail with a Link to a Personal Page."](#)

Liking, Commenting On, and Sharing Items in WebCenter Portal

This chapter describes how to like, comment on, and share items (such as messages, activities, files, links, and so on) in WebCenter Portal.

This chapter includes the following topics:

- [Section 15.1, "About Liking Items in WebCenter Portal"](#)
- [Section 15.2, "Liking Items"](#)
- [Section 15.3, "About Commenting on Items in WebCenter Portal"](#)
- [Section 15.4, "Commenting on Items"](#)
- [Section 15.5, "About Sharing Items in WebCenter Portal"](#)
- [Section 15.6, "Sharing Streamed Items with a Wider Audience"](#)
- [Section 15.7, "Sharing Messages, Files, and URLs"](#)

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

15.1 About Liking Items in WebCenter Portal

Liking is an accumulative rating system that enables you to see at a glance which items are liked and who likes them. A counter keeps track of the number of users who like an item and a link is available for viewing the users who like it. In a group of items, you can determine the most favored by its number of likes.

You can express liking for Message Board messages, Activity Stream entries, files, wikis, and blog entries.

Tip: Whether you or any user can like a message or activity depends on whether your system administrator has enabled liking for these features.

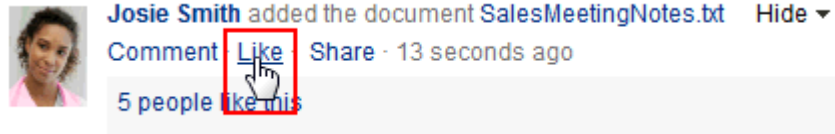
Note: Liking an activity associated with an item (for example, an activity entry for adding a document) is not the same as liking the item. The like count is calculated separately for the activity and the item.

15.2 Liking Items

To like an item, click the **Like** link or icon associated with the item:

- For Message Board messages and Activity Stream entries, click the **Like** link under the message or entry (Figure 15-1).

Figure 15-1 Like Link in the Activity Stream



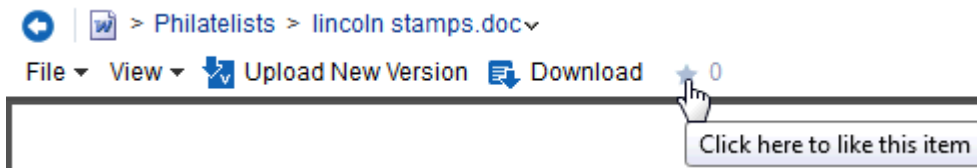
- For files in a Document list view (on the **Documents** page or in the Document Explorer, Document Manager, or Folder Viewer), click the Like icon (the star) in the file's row (Figure 15-2).

Figure 15-2 Like Icon in Document List View

Meetings	weblogic	4/26/13 11:45 AM		
lincoln stamps.doc	weblogic	4/28/13 11:32 PM	1	★ 0
lincoln stamps_files.zip	weblogic	4/28/13 8:58 PM	0	★ 0

- For files and wikis in the Document Viewer, click the Like icon (the star) in the menu bar (Figure 15-3).

Figure 15-3 Like Icon in Document Viewer

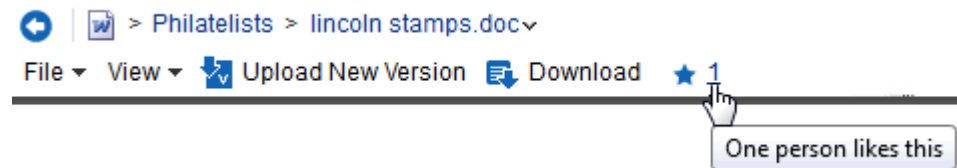


- For blog posts, click the Like icon (the star) at the bottom of the post (Figure 15-4).

Figure 15-4 Like Icon in Blog Post



The text under the **Like** link or the number to the right of the Like icon (Figure 15-5) indicates the number of users that like the file. Click the text or number to view a list of other users who have "liked" the item.

Figure 15–5 Like Icon Count

To remove your favorable rating (that is, *unlike* the object), click the **Unlike** link or click the star again.

15.3 About Commenting on Items in WebCenter Portal

Commenting provides a means of adding your thoughts, opinions, and questions directly to a given item in WebCenter Portal.

You can comment on Message Board messages, Activity Stream entries, files, wikis, and blog entries.

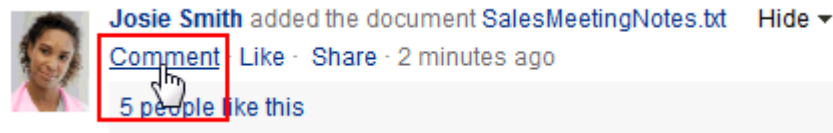
Notes:

- Commenting on an activity associated with a file (for example, an adding a document activity entry) is not the same as commenting on the file.
 - Public users viewing a public document cannot comment on the document.
-
-

15.4 Commenting on Items

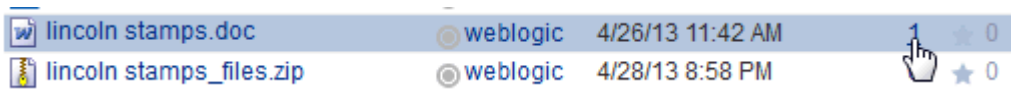
To enter a comment on an item:

1. Access comments by performing one of the following actions:
 - For Message Board messages and Activity Stream entries, click the **Comment** link under the message or entry (Figure 15–6).

Figure 15–6 Comment Link in the Activity Stream

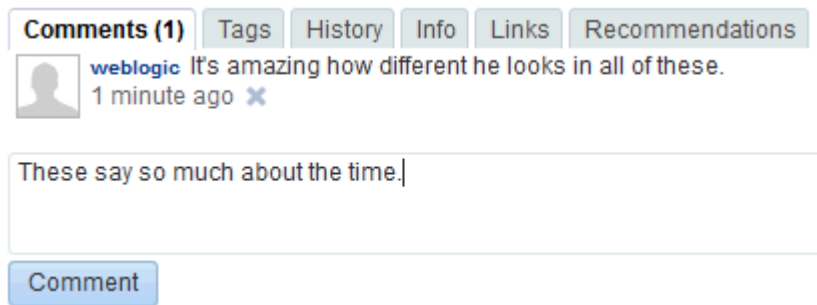
- For files in a Document list view (on the **Documents** page or in the Document Explorer, Document Manager, or Folder Viewer), open the Comments pane in any of the following ways:
 - Click the **View** menu, and select **Details**.
 - Right-click to display the file's context menu and select **Details**.
 - Click the value in the **Comments** column (Figure 15–7) for the file. This value indicates the number of comments that have been entered for each file.

Figure 15–7 Comments Column for a File



- For files and wikis in the Document Viewer or Rich Text Editor, scroll to the bottom of the document and click the **Comments** tab (Figure 15–8).

Figure 15–8 Comments Pane



- For blog posts, click the **comments** link at the bottom of the post (Figure 15–4).
2. To add a comment, enter it in the input area (Figure 15–9), then click **Comment**.

Figure 15–9 Write a Comment Text Box



To delete a comment:

1. Click the **Delete** icon associated with the comment (Figure 15–10).

Figure 15–10 Delete Icon for a Comment in the Activity Stream



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

Note: You can delete your own comments, or, if you are a portal moderator, you can delete comments in the portal you moderate.

15.5 About Sharing Items in WebCenter Portal

Sharing provides a means of on-the-spot distribution of items, status messages, files, and URLs of particular interest to a selected audience. Sharing is available in a few different forms:

- Share an item you receive in your Activity Stream by posting it to your connections' Activity Streams (for more information, see [Section 15.6.1, "Reposting Streamed Items"](#)).
- Share an item you receive in your Activity Stream through email (for more information, see [Section 15.6.2, "Emailing Streamed Items"](#)).
- Share an item, status message, file, or URL through Publisher (for more information, see [Section 15.7, "Sharing Messages, Files, and URLs"](#)).

To share an item directly from your Activity Stream, the item must contain an object. For example, you can share "Jack has updated doc.xml," but you cannot share "Jack and Jill are now connected." You can share anything you post through Publisher because the post itself is an object.

15.6 Sharing Streamed Items with a Wider Audience

You can share items that appear in your view of the Activity Stream with a wider audience. For example, when your view of the Activity Stream reports that one of your connections updated a document of great interest to all of your connections, you can share that streamed item with all of your connections.

You can do so by posting the streamed item to all of your connections' Activity Streams or to the Activity Streams of connections who belong to a named portal. You can also share streamed items through email, enabling you to share it with users to whom you are not connected or to make use of mail distribution lists.

Note: To share an item directly from your Activity Stream, the item must contain an object. For more information, see [Section 15.5, "About Sharing Items in WebCenter Portal."](#)

This section includes the following subsections:

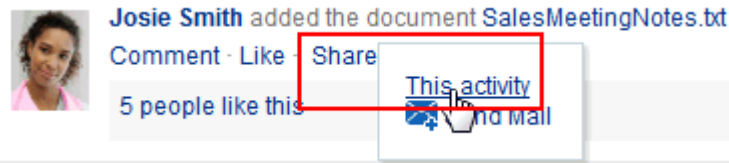
- [Section 15.6.1, "Reposting Streamed Items"](#)
- [Section 15.6.2, "Emailing Streamed Items"](#)

15.6.1 Reposting Streamed Items

To repost a streamed item to your connections' Activity Streams:

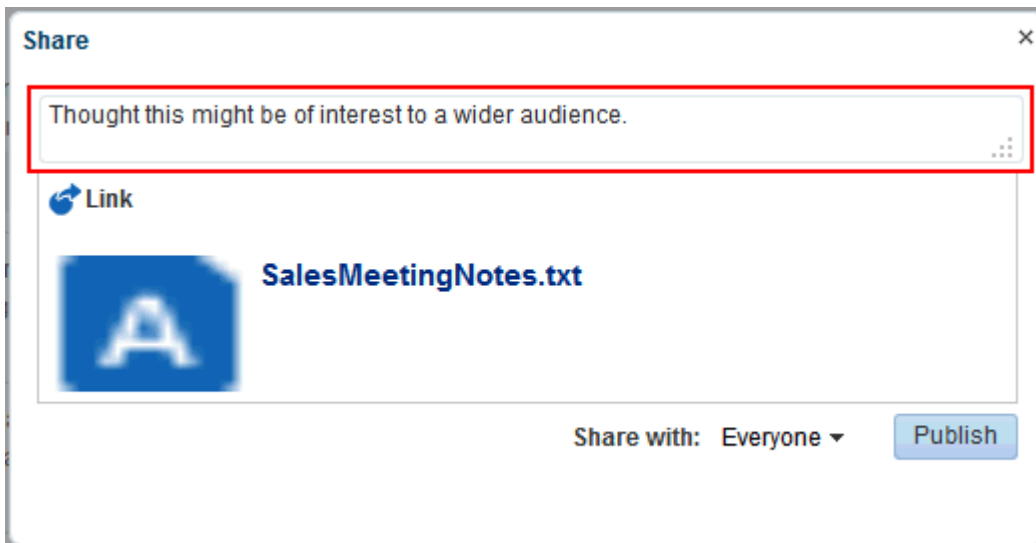
1. Go to the item you want to share, click **Share**, then click **This activity** ([Figure 15-11](#))

Figure 15–11 Share - This Activity Option



2. In the resulting Share dialog, optionally, enter a message to accompany the shared object (Figure 15–12).

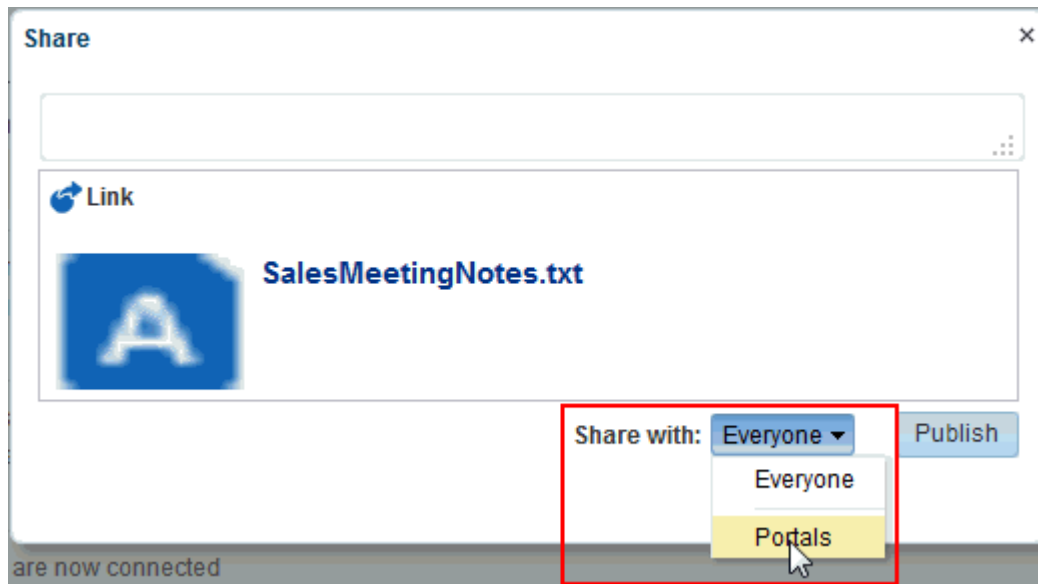
Figure 15–12 Adding a Message to a Shared Object



Note: When you share a message, rather than a file or a link, you cannot enter another message to accompany it.

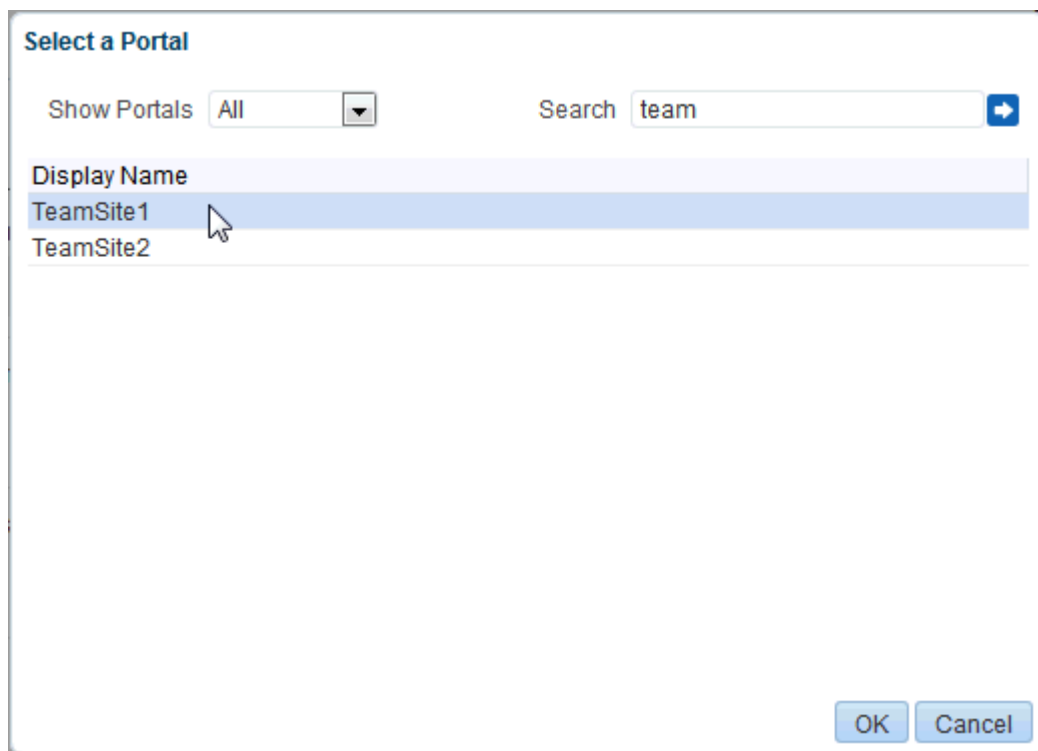
3. From the **Share with** menu (Figure 15–13), select with whom you want to share the object:

Figure 15–13 Share With Menu



- Select **Everyone** to share the item with all of your connections.
- Select **Portals** to open the Select a Portal dialog (Figure 15–14), where you can select a portal to share the item on the Home page of the portal.

Figure 15–14 Select a Portal Dialog



From the **Show portals** menu:

- Select **All** to show all of the portals to which you have access.

- Select **Joined** to show all of the portals you have explicitly joined.
- Select **Moderated** to show all of the portals for which you are a moderator.
- Select **Public** to show all public portals.

Alternatively, enter the name of a portal in the **Search** field and execute the search. Results appear in the dialog.

Click a portal, and then click **OK**.

4. Click **Publish**.

The item is posted to the Activity Streams of the selected recipients or on the Home page of the selected portal.

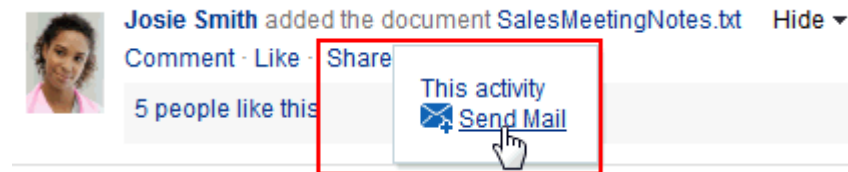
15.6.2 Emailing Streamed Items

To share a streamed item through email, use the **Send Mail** option. The Send Mail option is available on streamed items that include objects, such as a document. It is otherwise not available.

To share a streamed item through email:

1. Go to the item you want to share, click **Share**, then click **Send Mail** (Figure 15–15)

Figure 15–15 Share - Send Mail Option



A mail message opens, prepopulated with a link to the selected item.

2. Address, write, and send the message as you would any other email.

15.7 Sharing Messages, Files, and URLs

Publisher provides a means of publishing messages, files, and URLs to your connections' Activity Streams or to a portal's Activity Stream.

Notes: A portal's Activity Stream can be displayed in the portal, but portal members can also display the portal's activities in their own Activity Streams.

This section steps you through Publisher features. It includes the following subsections:

- [Section 15.7.1, "About Publisher"](#)
- [Section 15.7.2, "Publishing a Message"](#)
- [Section 15.7.3, "Sharing Files Through Publisher"](#)
- [Section 15.7.4, "Sharing URLs \(Links\) Through Publisher"](#)
- [Section 15.7.5, "Deleting a Published Message"](#)

See Also: For information about Activity Stream, see [Chapter 24, "Tracking Portal Activities."](#) For information about Profiles, see [Chapter 6, "Managing Your Profile."](#)

15.7.1 About Publisher

Publisher is very similar in operation to the Message Board (see [Chapter 14, "Working with Feedback and the Message Board"](#)). 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 is not controlled by configuration settings at the application level nor through your own personal Preferences. You specify who sees your published messages through a control in Publisher itself.

Note: Your system administrator can also specify that a message published through Publisher be used as a user's Profile status message ([Figure 15-16](#)).

Figure 15-16 *Published Message Used as Profile Status*



See Also: For information about Profile, see [Chapter 6, "Managing Your Profile."](#)

Depending on how your system administrator configured Publisher, it can show options for sharing messages, files, or links ([Figure 15-17](#)) or just show options for sharing documents ([Figure 15-18](#)).

Figure 15-17 *Publisher*

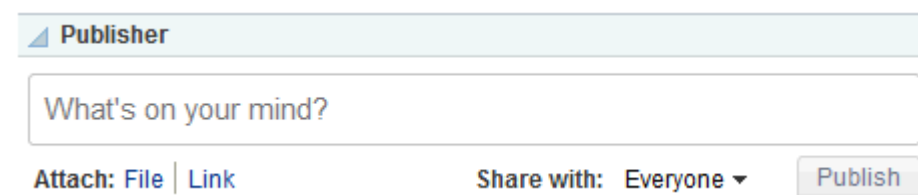
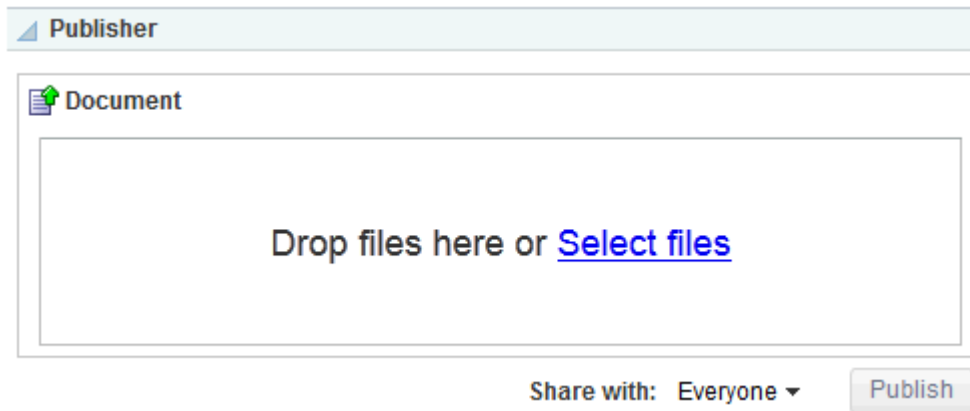


Figure 15–18 Publisher - Document Upload Only

Note: The **Share with** menu in Publisher appears only in the Home portal, not in other portals. This menu allows users to select whether to share information with your connections or only members of a specified portal. When Publisher is in a portal other than the Home portal, the published information is always shared with members of that portal.

In default WebCenter Portal installations, Publisher is part of the **Activities** page, which is provided in the Home portal for all authenticated users (that is, users who are logged in).

The default **Activities** page also contains an Activity Stream view where the messages you enter through Publisher are published.

Publisher features can also be embedded in some Profile views.

15.7.2 Publishing a Message

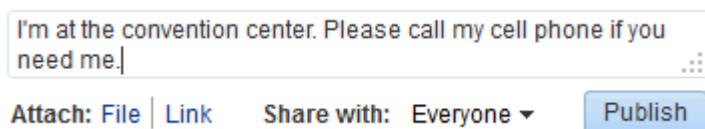
Publisher enables you to post a message to the Activity Stream to share with other users, and, if your system administrator has configured it, to display as your Profile status message.

To publish a message:

1. Go to the **Activities** page in the Home portal or to another view of Publisher in WebCenter Portal.

Tip: The way you access the **Activities** page depends on the page template in use. For example, in a side navigation template, you may access it through an **Activities** link.

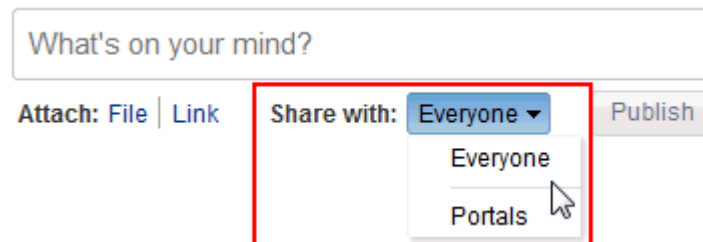
2. Click in the text area, and enter a message (Figure 15–19).

Figure 15–19 Publishing a Message

Note: The **Share with** menu in Publisher appears only in the Home portal, not in other portals. This menu allows users to select whether to share information with your connections or only members of a specified portal. When Publisher is in a portal other than the Home portal, the published information is always shared with members of that portal.

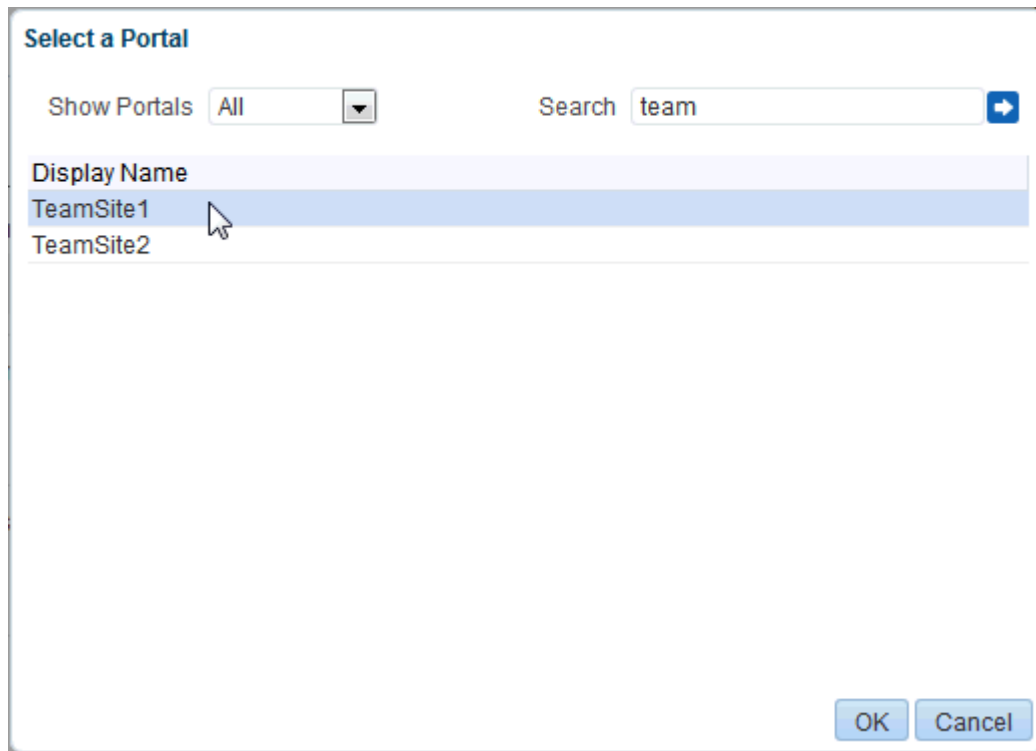
3. If you are viewing Publisher from the Home portal, select an option from the **Share with** menu (Figure 15–20):

Figure 15–20 Share With Menu



- Select **Everyone** to share the item with all of your connections.
- Select **Portals** to open the Select a Portal dialog (Figure 15–21) and select a portal. The shared file will appear in the selected portal's Activity Stream.

Figure 15–21 Select a Portal Dialog



From the **Show portals** menu:

- Select **All** to show all of the portals to which you have access.
- Select **Joined** to show all of the portals you have explicitly joined.
- Select **Moderated** to show all of the portals for which you are a moderator.
- Select **Public** to show all public portals.

Alternatively, enter the name of a portal in the **Search** field and execute the search. Results appear in the dialog.

Click a portal, and click **OK**.

4. Click **Publish**.

Your message appears in your Activity Stream and, as appropriate, your connections' Activity Streams or the portal's Activity Stream.

15.7.3 Sharing Files Through Publisher

Depending on whether you are sharing a personal file or a portal file, the shared file can appear in your connections' Activity Streams or in a portal's Activity Stream. Additionally, sharing a file through Publisher also stores the file in the Public folder of your personal document library.

Tip: If you prefer to have greater control over where a shared file is stored in your document library, you can upload it to the folder you prefer. Such uploads are also reported in your connection's activity streams, provided your Activity Stream is configured to show them. For more information, see [Section 24.3, "Setting Activity Stream Preferences."](#)

Notes:

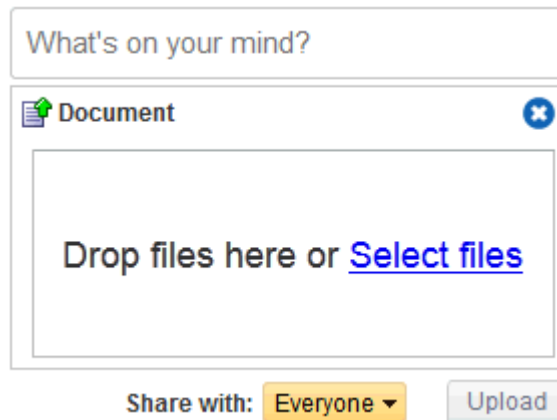
- Alternate methods of sharing files are described in [Section 19.21, "Sharing the URL for a Folder or File."](#) The difference with sharing files through Publisher is that the file is also stored in the Public folder of your personal document library. This is useful when the FrameworkFolders folder service is enabled, where folders and files include parent information in their metadata. Because other users do not have access to the parent folder for your personal documents, you cannot share a file from your personal document library (the **Documents** page in the Home portal) by only providing the URL. Instead, you can either copy the file to the Public folder, or share a personal file through Publisher, which is made accessible to any user in the Public folder of your personal document library. Similarly, you can use Publisher to share portal files where users may not have access to the parent folder in the portal.
 - Your system administrator can disable the ability to share files through Publisher. If you do not see the **Attach: File** link, contact your system administrator.
-
-

To share files through Publisher:

1. Go to the **Activities** page in the Home portal or to another view of Publisher in WebCenter Portal.

2. Optionally, click in the text area and enter the message you want to accompany the file.
3. Next to **Attach**, click **File** to open the field for attaching a file (Figure 15–22)

Figure 15–22 Attach File Field



Note: The **Share with** menu in Publisher appears only in the Home portal, not in other portals. This menu allows users to select whether to share information with your connections or only members of a specified portal. When Publisher is in a portal other than the Home portal, the published information is always shared with members of that portal.

4. Click **Select files** to navigate to and select the file you want to share.
5. If you are viewing Publisher from the Home portal, select an option from the **Share with** menu.

Note: For more information, see Step 3 of [Section 15.7.2, "Publishing a Message."](#)

6. Click **Upload**.

The file is added to your Activity Stream and, as appropriate, your connections' Activity Streams or the portal's Activity Stream. It is also stored in the Public folder of your personal document library.

Note: Whether a file or a link to a file is shown depends on how your system administrator configured the Activity Stream.

15.7.4 Sharing URLs (Links) Through Publisher

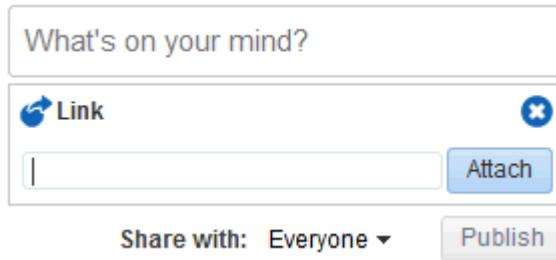
In addition to sharing messages through Publisher, you can share links.

To share links through Publisher:

1. Go to the **Activities** page in the Home portal or to another view of Publisher in WebCenter Portal.

2. Optionally, click in the text area and enter the message you want to accompany the link.
3. Next to **Attach**, click **Link** to open field for entering a URL (Figure 15-23).

Figure 15-23 Attach Link Field



Note: The **Share with** menu in Publisher appears only in the Home portal, not in other portals. This menu allows you to select whether to share information with your connections or only members of a specified portal. In a portal other than the Home portal, the published information is always shared with members of that portal.

4. Enter the URL you want to share, and click **Attach**.
5. If you are viewing Publisher from the Home portal, select an option from the **Share with** menu.

Note: For more information, see Step 3 of [Section 15.7.2, "Publishing a Message."](#)

6. Click **Publish**.

The link is added to your Activity Stream and, as appropriate, your connections' Activity Streams or the portal's Activity Stream.

Note: Whether a file or a link to a file is shown depends on how your system administrator configured the Activity Stream.

15.7.5 Deleting a Published Message

Next to text or links that you post, there is a delete icon (Figure 15-24). Click the delete icon to delete your message.

Figure 15-24 Delete Message



Note: Messages that include shared files do not display a delete icon. To delete a message with a shared file, go to your Public documents folder (for example, on the **Documents** page, open the **Public** folder) and delete it from there. For more information, see [Section 19.12, "Deleting Folders and Files."](#)

Viewing and Participating in Discussions

This chapter describes how to work with discussions. Discussions provide a means of creating and participating in text-based discussions with other members of a portal. Use discussions to post questions and search for answers. Discussion forums additionally provide the means to preserve and revisit discussions.

This chapter includes the following topics:

- [Section 16.1, "About Discussions"](#)
- [Section 16.2, "Working with Discussions"](#)

Permissions: This chapter is intended for WebCenter Portal users who want to view, create, and manage portal discussion forums and topics. To perform the tasks in this chapter, you need *one* or more of the following portal-level permissions:

- Create, Edit, and Delete Discussions
- Create and Edit Discussions
- View Discussions

These permissions are not granted by default to the portal Participant role.

Note: Tasks discussed in this chapter are not available if discussions are not enabled and exposed. The portal moderator adds and configures discussions, as described in the "Adding Discussion Forums to a Portal" chapter in *Building Portals with Oracle WebCenter Portal*.

16.1 About Discussions

You can use the discussions feature to post, respond to, and preserve topical information in discussion forums scoped to portals or to the entire WebCenter Portal application. Users post topics to a discussion forum, and other users post information relevant to those topics. All of this information is preserved within the forum.

A new portal is assigned a single discussion forum by default; however, portal moderators can specify to include multiple discussion forums in a portal. Discussions are scoped to portals. That is, you can create forums and topics only within the context of a portal. You can view and participate in discussions in both portals and the Home portal, depending on your permissions.

Access to discussions is influenced by portal security. Users can access discussions according to the permissions they are granted by their specific user roles within a given portal.

Scoping additionally limits the users who can view and participate in discussions. For example, only members of the *Finance* portal can view discussions that transpire in *Finance* portal forums.

Discussion forums provide configuration settings for specifying which forum content to show. This is of particular use in the Home portal, which exists outside a specific portal scope.

Discussions provides a wide variety of ways for viewing and participating in discussions. These include the following:

- Discussion Forums** provides controls for creating discussion forums (available to the portal moderator or participants having Create, Edit, and Delete Discussions permissions) as shown in [Figure 16-1](#) (notice that the **Create Forum** option is not available in the participant's view in [Figure 16-1](#)); creating, replying to, and managing discussion forum topics; and selecting watched forums and watched topics ([Figure 16-2](#)).

Figure 16-1 Discussion Forums View Showing Multiple Discussion Forums

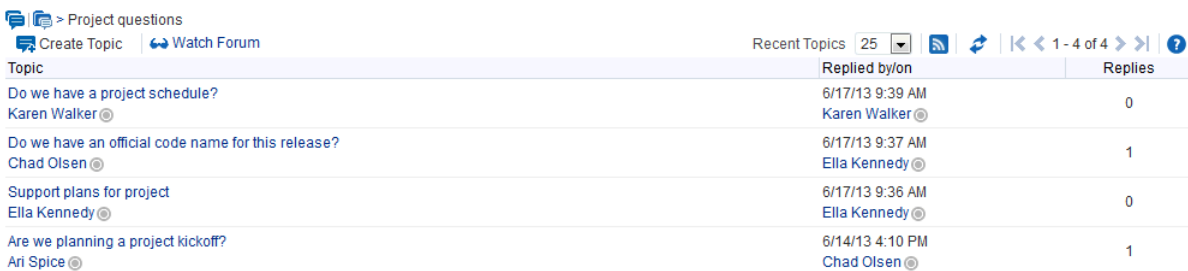


Forum	Last Post	Topics
Deprecated products <small>Discuss products that are to be deprecated in this release</small>	6/17/13 9:33 AM	1
Features list <small>List of features for iteration 3</small>	6/17/13 9:34 AM	1
MyXYZCompanyPortal <small>MyXYZCompanyPortal</small>	6/14/13 12:20 PM	4
Project questions	6/14/13 4:32 PM	2

Only portal moderators can create, edit, and delete discussion forums, as described in the "Creating a Discussion Forum" section in *Building Portals with Oracle WebCenter Portal*. To view and post to different discussion forums, the enabling multiple forums option must be selected for the portal.

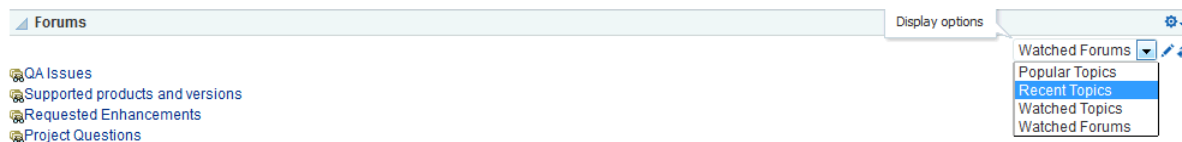
For more information about creating and managing forum topics and replies, watching forums and topics, showing and hiding forum information, and sending mail from discussion topics, see [Section 16.2, "Working with Discussions."](#)

Figure 16-2 Discussion Forums - Topics in a Single Discussion Forum

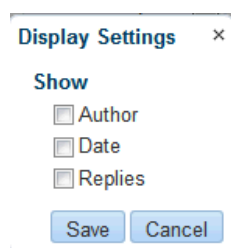


Topic	Replied by/on	Replies
Do we have a project schedule? Karen Walker	6/17/13 9:39 AM Karen Walker	0
Do we have an official code name for this release? Chad Olsen	6/17/13 9:37 AM Ella Kennedy	1
Support plans for project Ella Kennedy	6/17/13 9:36 AM Ella Kennedy	0
Are we planning a project kickoff? Ari Spice	6/14/13 4:10 PM Chad Olsen	1

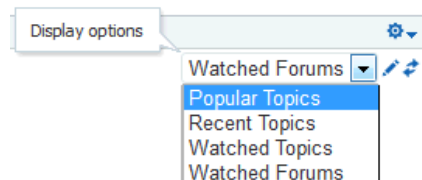
- Forums** view provides a means of accessing all possible views of a particular portal's discussions: Recent Topics, Popular Topics, Watched Topics, and Watched Forums ([Figure 16-3](#)).

Figure 16–3 Forums

Forums view also provides controls for determining the data to show in addition to the forum or topic title. Click the **Personalize** icon (pencil) in the toolbar to open the Display Settings dialog (Figure 16–4). For example, when Recent Topics is selected on the menu, the Display Settings dialog offers the options **Author**, **Date**, and **Replies** (Figure 16–4). When Watched Forums is selected, the Display Settings dialog offers the options **Date** and **Topics**.

Figure 16–4 Display Settings Dialog

The available display options vary according to the option currently selected on the Forums - Quick View **Display Options** menu (Figure 16–5).

Figure 16–5 Display Options Menu (Forums - Quick View)

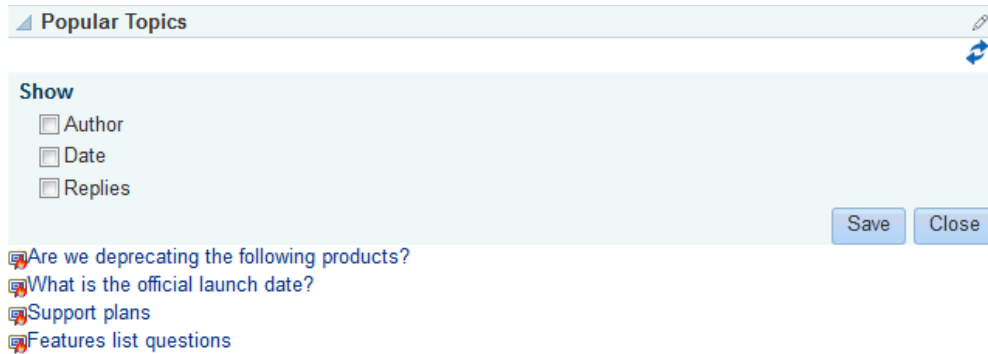
See Section 16.2.3.1, "Showing or Hiding Information in Forums View" for more information.

- **Popular Topics** (Figure 16–6) provides a look at the most frequently viewed discussion topics in all the discussion forums in a given portal.

Figure 16–6 Popular Topics

Popular Topics also provides controls for determining the data to show in addition to the topic title. Click the **Personalize** icon to open a panel with controls for selecting the type of additional data to show (Figure 16–7).

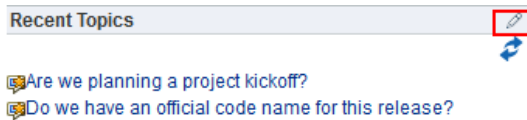
Figure 16–7 Show Panel in Popular Topics



See [Section 16.2.3.2, "Showing or Hiding Information in Popular Topics"](#) for more information.

- **Recent Topics** ([Figure 16–8](#)) provides a look at the most recently accessed discussion topics in all the discussion forums in a given portal.

Figure 16–8 Recent Topics



Access to portal discussion topics is restricted to those portals of which you are a member.

Recent Topics also provides controls for determining the data to show in addition to the topic title. Click the **Personalize** (pencil) icon to open a panel with controls for selecting the type of additional data to show ([Figure 16–9](#)).

Figure 16–9 Show Panel in a Recent Topics

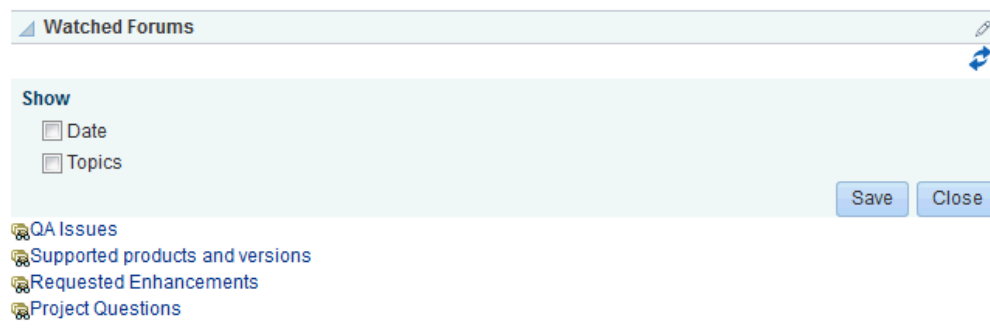


See [Section 16.2.3.3, "Showing or Hiding Information in Recent Topics"](#) for more information.

- **Watched Forums** ([Figure 16–10](#)) provides a means of viewing all discussion forums you have selected to watch from a particular portal or from all portals.

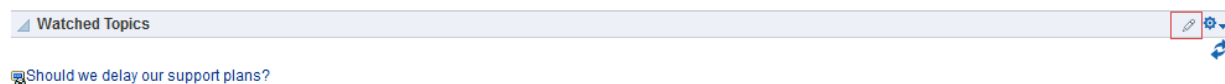
Figure 16–10 Watched Forums

Watched Forums also provides controls for determining the data to show with the topic title. Click the **Personalize** icon to open a panel with controls for specifying the type of additional data to show (Figure 16–11).

Figure 16–11 Show Panel in Watched Forums

See [Section 16.2.3.4, "Showing or Hiding Information in Watched Forums"](#) for more information.

- **Watched Topics** (Figure 16–12) provides a cohesive view of all the topics you have selected to watch from a particular portal or from all portals.

Figure 16–12 Watched Topics

Watched Topics also provides controls for determining the data to show with the topic title. Click the **Personalize** icon (pencil) to open a panel with controls for specifying the type of additional data to show (Figure 16–13).

Figure 16–13 Show Panel in Watched Topics

See [Section 16.2.3.5, "Showing or Hiding Information in Watched Topics"](#) for more information.

Discussions is tightly integrated with other assets, such as links and mail. For example, mail sent to a portal distribution list can additionally be posted to that portal's default

discussion forum. The portal moderator must choose **Monitor Incoming Mail** in the portal Tools and Services for Discussions. For more information, see the "Publishing Portal Mail in a Discussion Forum" section in *Building Portals with Oracle WebCenter Portal*.

Every discussion topic provides the opportunity to link from the topic to another portal asset, such as a document or an announcement. See [Section 32.2.1.3, "Linking to an Existing Discussion Forum Topic"](#) and [Section 32.2.2.2, "Adding and Linking to a Discussion Forum Topic"](#) for more information.

16.2 Working with Discussions

The Discussion Forums feature 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 views, such as Watched Topics or Watched Forums are useful windows into discussion forum content. They provide different views of the discussion forums and topics available to a particular portal or all portals.

Most of the subsections in this section describe tasks you can accomplish through the Discussion Forums page (or console). It is noted when you can use other views to perform the described actions.

This section contains the following topics:

Note: Only portal moderators can create discussion forums and edit discussion forums (unless participants have Create, Edit, and Delete Discussions permissions). See the "Creating a Discussion Forum" and "Editing the Forum Name and Description" sections in *Building Portals with Oracle WebCenter Portal*.

- [Section 16.2.1, "Creating and Managing Forum Topics and Replies"](#)
- [Section 16.2.2, "Watching Forums and Topics"](#)
- [Section 16.2.3, "Showing and Hiding Additional Discussion Forum Information"](#)
- [Section 16.2.4, "Sending Mail from Discussion Topics"](#)

16.2.1 Creating and Managing Forum Topics and Replies

The life of a discussion forum takes place in its topics and replies. Users can ask questions, post information, exchange ideas, and otherwise communicate in interesting and useful ways.

Note: Only portal moderators can create, edit, and delete discussion forums. See the "Creating a Discussion Forum," "Editing the Forum Name and Description," and "Deleting a Discussion Forum" sections in *Building Portals with Oracle WebCenter Portal*.

This section describes how to work with discussion forum topics and replies. It contains the following topics:

- [Section 16.2.1.1, "Posting a New Forum Topic"](#)
- [Section 16.2.1.2, "Replying to Topic Posts"](#)
- [Section 16.2.1.3, "Viewing Topic Posts and Replies"](#)

- [Section 16.2.1.4, "Editing Topics and Replies"](#)
- [Section 16.2.1.5, "Deleting Topic Posts and Replies"](#)
- [Section 16.2.1.6, "Selecting the Number of Topics or Forums to Display"](#)
- [Section 16.2.1.7, "Toggling Between Topic View Modes"](#)

16.2.1.1 Posting a New Forum Topic

When you consider discussion forums hierarchically, the forum is the top container and topics are the next level down. Each posted topic can have subordinate replies, and the replies themselves can also have replies ([Figure 16–14](#)).

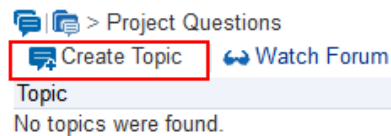
Figure 16–14 A Posted Topic and a Reply to the Topic



To post a topic under a discussion forum:

1. Go to the Discussion Forums console and then navigate to the forum topics page, and click **Create Topic** ([Figure 16–15](#)).

Figure 16–15 Create Topic

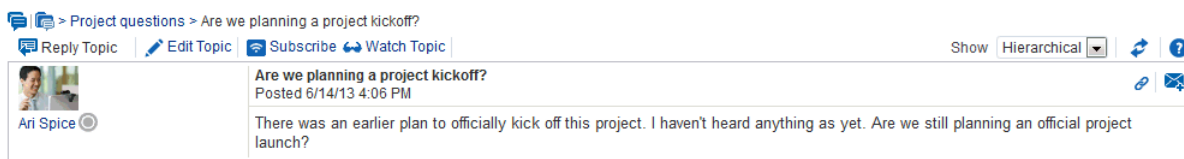


The Create Topic dialog opens ([Figure 16–16](#)).

Figure 16–16 Create Topic Dialog

The screenshot shows a 'Create Topic' dialog box. At the top, there is a 'Subject' field with an asterisk indicating it is required. Below it is a 'Message' field, also with an asterisk, which includes a rich text editor toolbar with options for font, size, bold, italic, underline, strikethrough, bulleted list, numbered list, indent, outdent, link, unlink, and insert image. At the bottom right of the dialog are two buttons: 'Create' and 'Cancel'.

2. In the **Subject** field, enter the subject of the topic.
You can enter up to 200 characters.
3. In the **Message** field, enter more details about the topic.
You can enter up to 4000 characters.
4. Click **Create**.
The newly-posted topic appears under the selected forum in Discussion Forums. Click the topic subject to view the message (Figure 16–17).

Figure 16–17 A New Discussion Forum Topic

16.2.1.2 Replying to Topic Posts

To reply to topic posts:

1. Go to the Discussion Forums console and then navigate to the forum topics page, and click the relevant topic link (Figure 16–18).

Figure 16–18 Discussion Forums Topic

Topic	Replied by/on	Replies
Do we have an official code name for this release? Chad Olsen	6/14/13 4:32 PM Chad Olsen	0
Are we planning a project kickoff? Ari Spice	6/14/13 4:10 PM Chad Olsen	1

The selected topic opens.

2. Click **Reply Topic** (Figure 16–19).

Figure 16–19 Reply Topic

Project questions > Are we planning a project kickoff?

Reply Topic | Edit Topic | Subscribe | Watch Topic

Show Hierarchical

Are we planning a project kickoff?
Posted 6/14/13 4:06 PM

Ari Spice

There was an earlier plan to officially kick off this project. I haven't heard anything as yet. Are we still planning an official project launch?

The Reply Topic dialog opens (Figure 16–20).

Figure 16–20 Reply Topic Dialog

Reply Topic

* Subject: Re: Are we planning a project kickoff?

* Message: Font 2

B / U s_2 s^2 **S** [List icons] [Link icon] [Image icon]

Reply Cancel

3. In the **Subject** field, either leave the text as is or revise it.
You can enter up to 200 characters.
4. In the **Message** text box, enter your reply to the topic.
You can enter up to 4000 characters.

5. Click **Reply**.

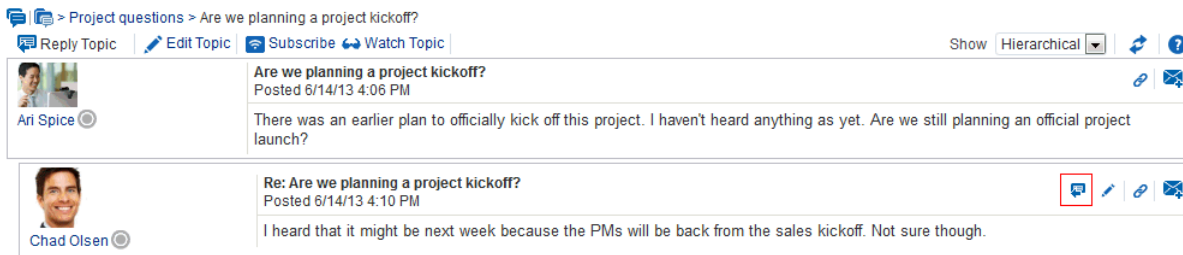
Your reply appears below the main topic post (Figure 16–21).

Figure 16–21 A Topic Post and a Reply



To post a reply to a reply, click the **Reply to message** icon (Figure 16–22) and follow the steps described in this section.

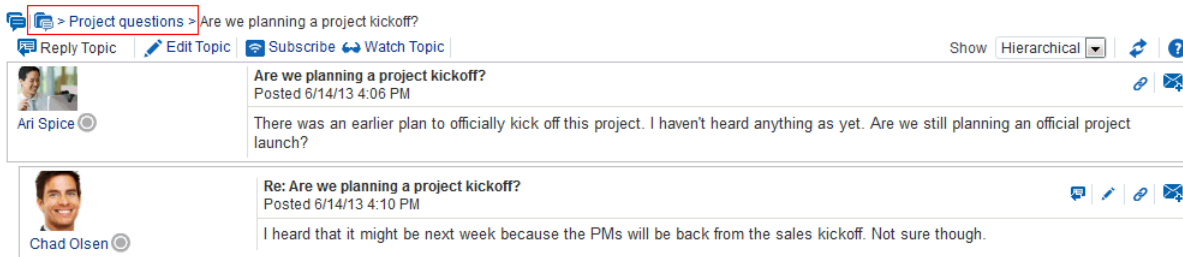
Figure 16–22 Reply to message Icon



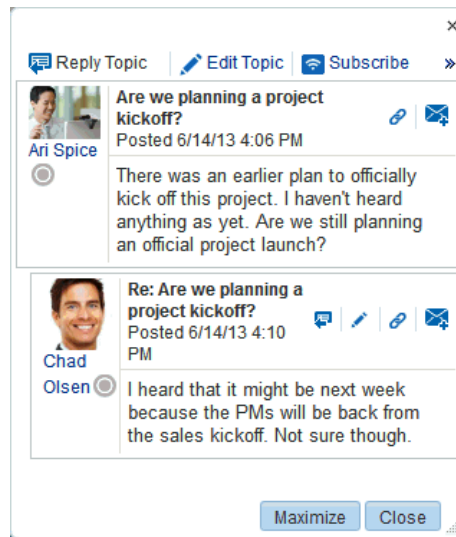
16.2.1.3 Viewing Topic Posts and Replies

With Discussion Forums, topics and replies to the topic open directly in Discussions Forums. To navigate back up the forum hierarchy, click the locator links that display above the topic reply area (Figure 16–23).

Figure 16–23 Forum Locator Links



With all the other Discussions views, topics open in a separate window. For example, in Figure 16–24, the topic and its reply displays in a window after clicking the topic from the Watched Topics view.

Figure 16–24 Viewing a Topic in Discussions - Watched Topics

To return to the main view, click the **Close** button in the window.

16.2.1.4 Editing Topics and Replies

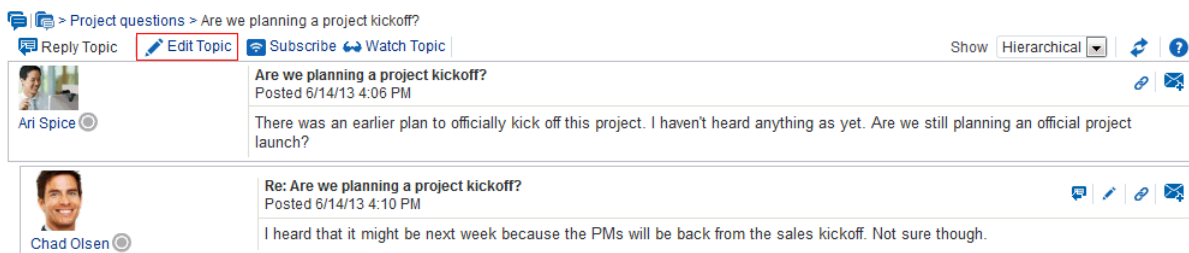
After you post a topic or a reply, you retain the option of returning to it and revising its content. Only you, as the topic author, and portal moderators can edit your replies. This section describes how to edit topics and replies.

To edit a topic or a reply:

1. Go the Discussion Forum that displays the topic or reply you want to edit, and click the relevant topic.

The selected topic opens.

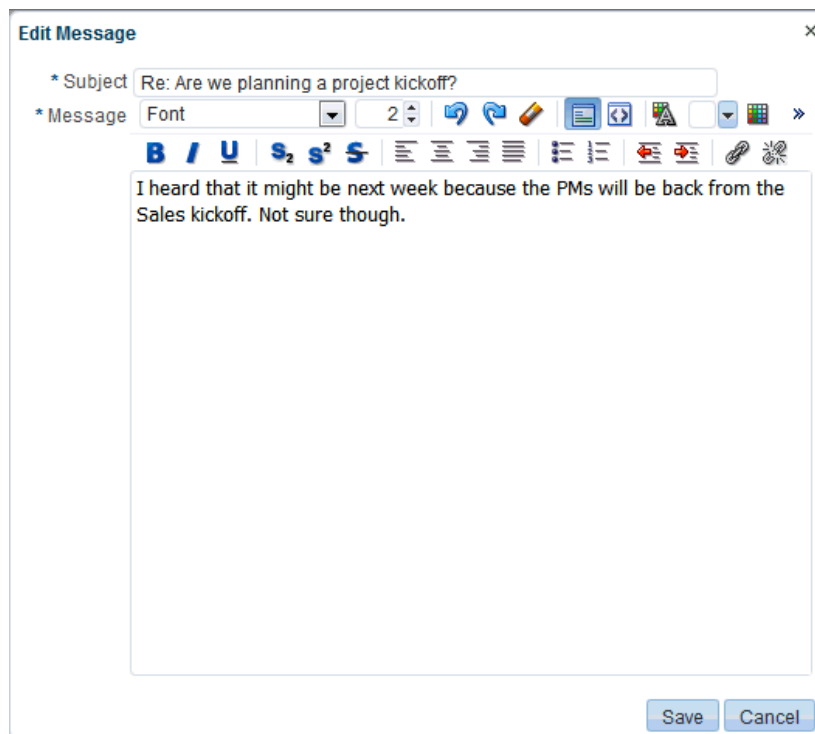
2. To edit a topic or a reply, do the following:
 - To edit the topic, click **Edit Topic** (Figure 16–25).

Figure 16–25 Edit Topic

- To edit a reply, click the **Edit message** icon (pencil) associated with the reply (Figure 16–26). Only the user who authored the reply or the portal moderator can view the icon.

Figure 16–26 Edit Message Icon

The Edit Topic or Edit Message dialog opens (Figure 16–27).

Figure 16–27 Edit Message Dialog

3. Revise the topic (up to 200 characters) or reply (up to 4000 characters).
4. Click **Save**.

Your changes are posted to the forum.

16.2.1.5 Deleting Topic Posts and Replies

When you delete a topic, the original topic post and all of its subordinate replies are deleted. When you delete a reply, you can select to delete the original reply as well as all of its subordinate replies or to delete only this message and keep its replies.

The steps to delete topics and replies are similar.

Note: To delete a topic post or reply, you must be the user who created it or you must have access equivalent to the portal moderator (Create, Edit, and Delete Discussions permissions). If you do not have the permission to delete, you will not see the option to delete.

To delete a topic or a reply:

1. Go to the Discussion Forum that displays the topic or reply you want to delete, and click the relevant topic (Figure 16–28).

Figure 16–28 Discussion Forum Topic

Topic	Replied by/on	Replies
Do we have an official code name for this release? Chad Olsen	6/14/13 4:32 PM Chad Olsen	0
Are we planning a project kickoff? Ari Spice	6/14/13 4:10 PM Chad Olsen	1

The selected topic opens.

2. Your next step depends on whether you want to delete a topic or a reply:
 - To delete a topic, click the **Delete Topic** link (Figure 16–29).

Figure 16–29 Delete Topic Link

Project questions > Are we planning a project kickoff?

Reply Topic | Edit Topic | **Delete Topic** | Subscribe | Watch Topic

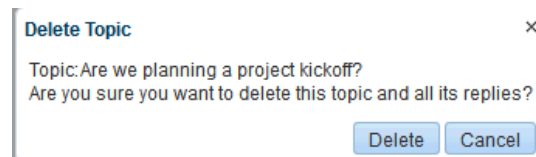
Are we planning a project kickoff?
Posted 6/14/13 4:06 PM

There was an earlier plan to officially kick off the launch?

Re: Are we planning a project kickoff?
Posted 6/14/13 4:10 PM

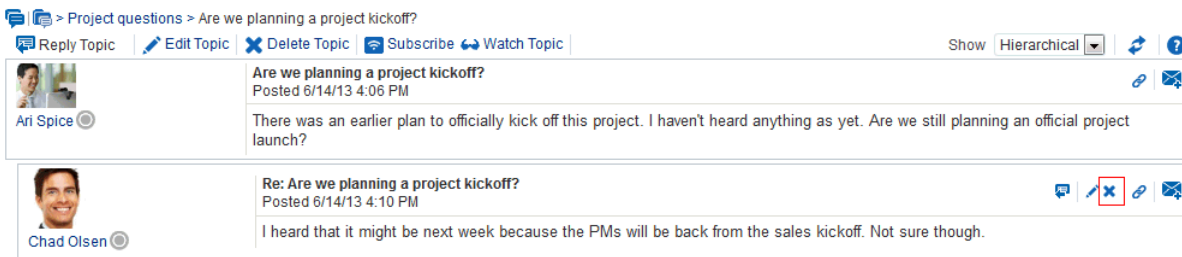
A Delete Topic confirmation dialog opens (Figure 16–30).

Figure 16–30 Delete Confirmation Dialog for Topics



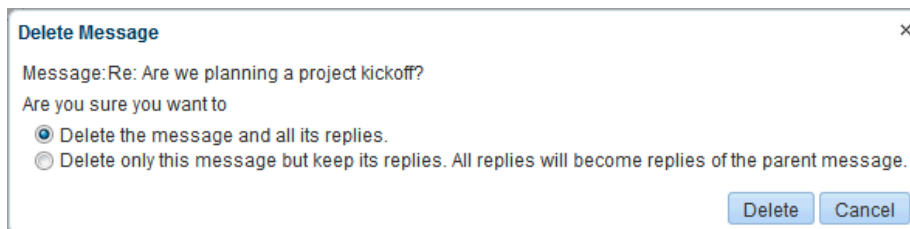
- To delete a reply, click the **Delete message** icon associated with the reply (Figure 16–31).

Figure 16–31 Delete Message Icon



A Delete Message confirmation dialog opens, with the option to select if you want to delete this message and all its replies or delete only this message (Figure 16–32).

Figure 16–32 Delete Confirmation Dialog for Topic Replies

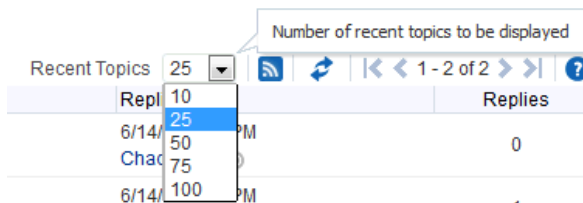


3. Select an option, and then click **Delete** to confirm the deletion.

16.2.1.6 Selecting the Number of Topics or Forums to Display

You can decide how many topics or forums to display; for example, 10, 25, 50, 75, or 100 (Figure 16–33).

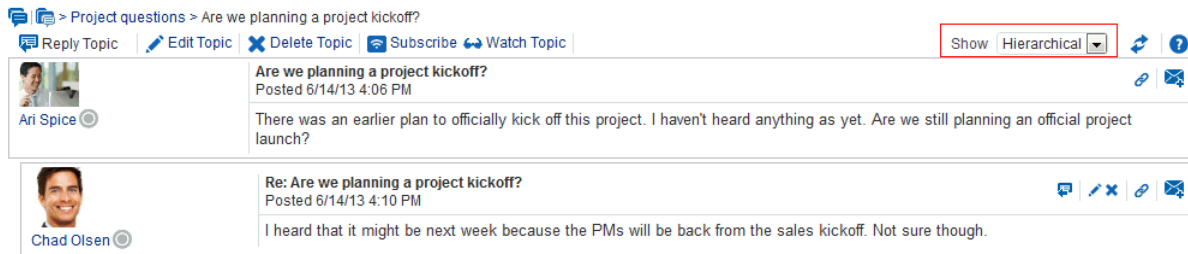
Figure 16–33 Number of Topics to Display



For example, if you choose to display 10 topics, and if there are more than 10 topics available, then you click the **More** link to see the next 10 topics, and so on. (Note that your portal moderator may have configured the portal to not show the **More** link or to show a specific number of topics.)

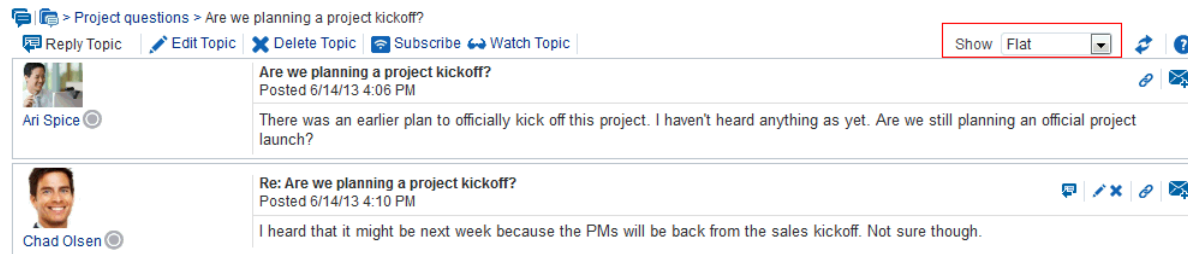
16.2.1.7 Toggling Between Topic View Modes

You have the option of viewing a topic and all of its replies in a hierarchical (indented) mode or a flat (unindented) mode. The hierarchical mode (Figure 16–34) uses indenting to indicate whether a reply is to the topic or to another reply.

Figure 16–34 Hierarchical View Mode

For example, in [Figure 16–34](#) the first entry is the main topic, the second is a reply to the topic, and so on.

The flat mode ([Figure 16–35](#)) makes no such distinctions.

Figure 16–35 Flat View Mode

All Discussion views that show topics and replies on the same screen provide Show view mode options.

To toggle between topic view modes:

1. Go to the Discussions view that contains the topic you want to view, and click the topic.
2. From the **Show** drop-down list, select **Flat** or **Hierarchical**.

The topic view renders according to your selection. (You might have to click **Refresh** or click another page and then return to the page where the Discussions view is to see the changes.)

16.2.2 Watching Forums and Topics

Watching discussion forums and topics provides a convenient means of keeping a close eye on the information most current and relevant to you. The forums and topics you choose to watch are appear in your view only. No other user is affected by the forums and topics you choose to watch.

When you select to watch a forum or a topic, whenever users add to that forum or topic, in addition to it appearing in the user's watched forums or topics list, you receive a mail notification.

This section includes information about how to add, view, and manage watched topics and forums. It contains the following subsections:

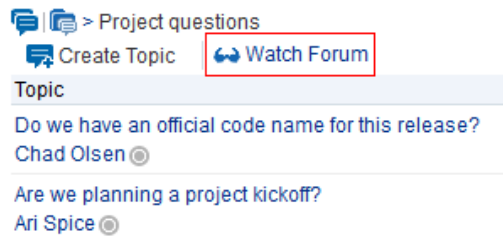
- [Section 16.2.2.1, "Adding a Discussion Forum or Topic to Your Watch List"](#)
- [Section 16.2.2.2, "Removing a Discussion Forum or Topic from a Watch List"](#)
- [Section 16.2.2.3, "Viewing Watched Forums and Topics from the Forums View"](#)

16.2.2.1 Adding a Discussion Forum or Topic to Your Watch List

To add a discussion forum or topic to your watch list:

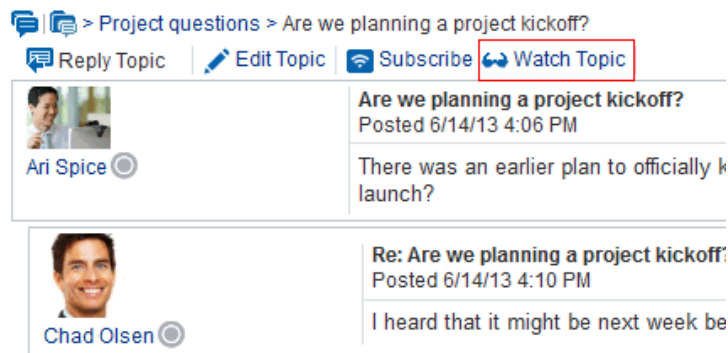
1. Go to the discussion forum or topic you want to add to your watch list.
2. The next step depends on whether you want to watch a forum or a topic:
 - To watch a forum, click **Watch Forum** at the top of the forum (Figure 16–36).

Figure 16–36 Watch Forum Link on the Forum



- To watch a topic, click the topic link, then click **Watch Topic** at the top of the topic (Figure 16–37).

Figure 16–37 Watch Topic Link on the Topic



The watched forum or topic is listed on all Watched Forums or Watched Topics views, for example, in Watched Forums and Watched Topics (Figure 16–38) views.

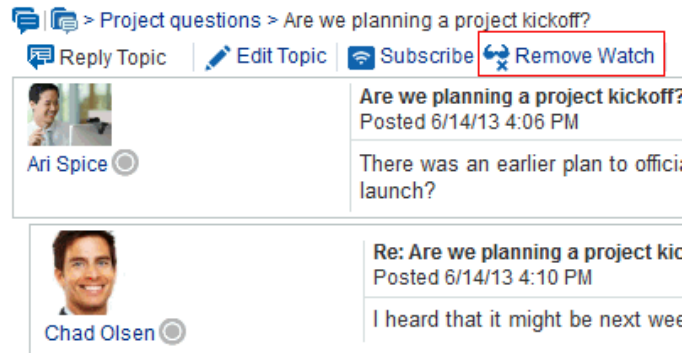
Figure 16–38 Watched Forums View



16.2.2.2 Removing a Discussion Forum or Topic from a Watch List

To remove a discussion forum or a discussion topic from your watch list:

1. Go to the discussion forum or topic you want to remove from your watch list.
2. Click **Remove Watch** on the forum or topic (Figure 16–39).

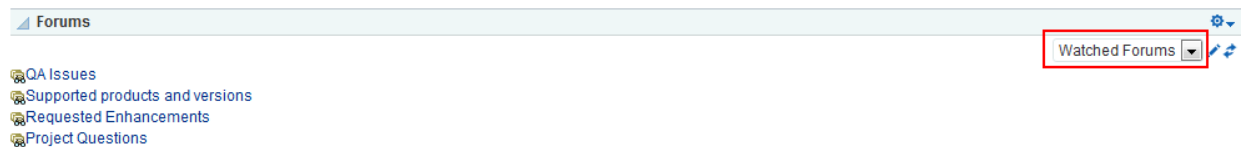
Figure 16–39 Remove Watch Icon in a Topic

The selected item is removed from your forum or topic watch list upon refresh.

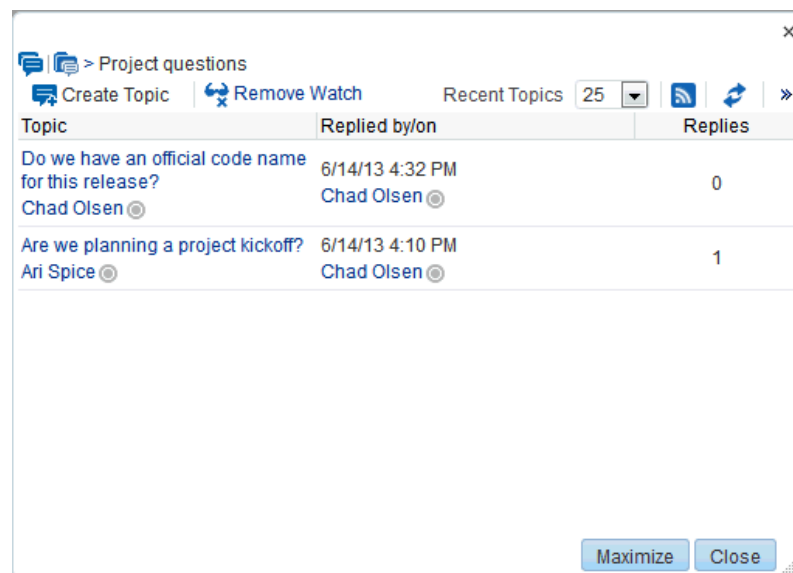
16.2.2.3 Viewing Watched Forums and Topics from the Forums View

To view a watched forum or topic from the Forums view:

1. From the Forums view, set the panel display option to **Watched Forums** or **Watched Topics** (Figure 16–40).

Figure 16–40 Watched Forums on the Forums - Quick View

2. Click the link to the discussion forum or forum topic you want to view.
The forum or topic opens (Figure 16–41).

Figure 16–41 A Watched Forum Opened from the Quick View

16.2.3 Showing and Hiding Additional Discussion Forum Information

Most discussions views provide personalization settings for determining the amount of information to show in addition to the forum or topic title (the Discussion Forums view does not provide such settings). Additional information can include forum or topic author, creation date, and replies or topics.

How you set these display settings is personal, affecting only your view. How you access these display settings varies slightly from each discussion view.

This section describes how to configure display settings. It contains the following topics:

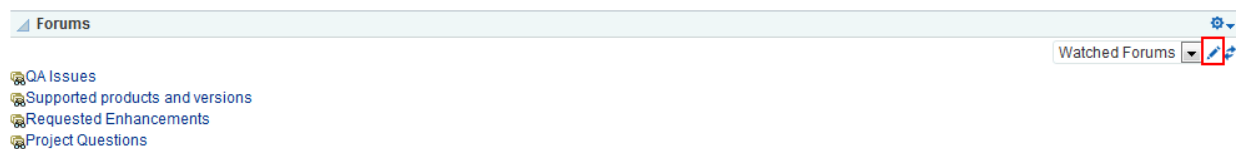
- [Section 16.2.3.1, "Showing or Hiding Information in Forums View"](#)
- [Section 16.2.3.2, "Showing or Hiding Information in Popular Topics"](#)
- [Section 16.2.3.3, "Showing or Hiding Information in Recent Topics"](#)
- [Section 16.2.3.4, "Showing or Hiding Information in Watched Forums"](#)
- [Section 16.2.3.5, "Showing or Hiding Information in Watched Topics"](#)

16.2.3.1 Showing or Hiding Information in Forums View

To show or hide additional information in Discussions Forums View:

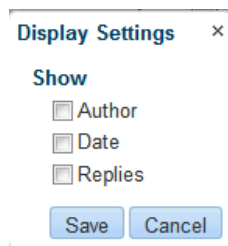
1. Go to the Forums view where you want to select display settings.
2. Click the **Select the data to display** icon ([Figure 16–42](#)).

Figure 16–42 Select the data to display Icon in Forums



The Display Settings dialog opens ([Figure 16–43](#)).

Figure 16–43 Display Settings Dialog



3. Select the data you want to show, or deselect the data check box you want to hide. Select or deselect one or more from:
 - **Author**—The user name of the person who created the forum or topic (for Watched Forums, this option does not appear).
 - **Date**—The date the forum or topic was last updated.
 - **Replies**—The replies associated with the topic (for Watched Forums, this displays Topics).

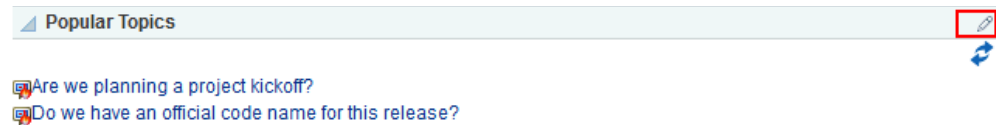
4. Click **Save** to save your changes and close the dialog.

16.2.3.2 Showing or Hiding Information in Popular Topics

To show or hide additional information in Popular Topics:

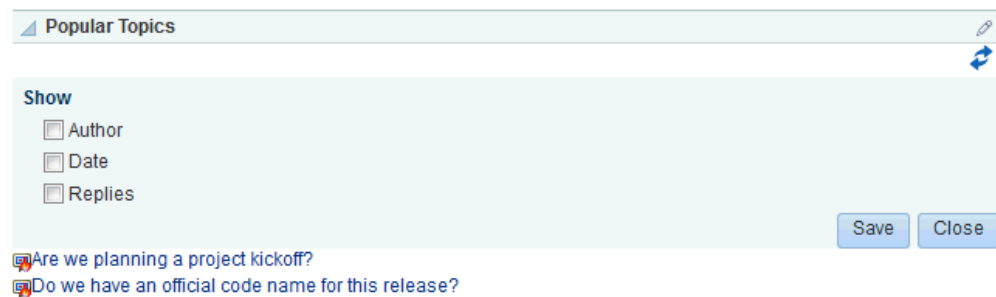
1. Go to the Popular Topics view where you want to show or hide additional information.
2. Click the **Personalize** icon (pencil) in the header (Figure 16–44).

Figure 16–44 Personalize Icon in Popular Topics



The Show panel displays, where you can select or deselect additional data (Figure 16–45).

Figure 16–45 Show Panel in Popular Topics



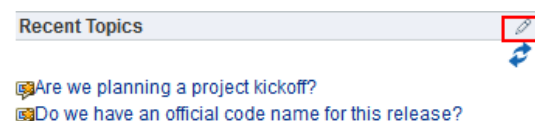
3. Select the data you want to show, or deselect the data check box you want to hide. Select or deselect one or more from:
 - **Author**—The user name of the person who posted the topic
 - **Date**—The date the topic was last updated
 - **Replies**—The replies associated with the topic
4. Click **Save** to save your changes and close the panel.

16.2.3.3 Showing or Hiding Information in Recent Topics

To show or hide additional information in Recent Topics:

1. Go to the Recent Topics view where you want to show or hide additional information.
2. Click the **Personalize** icon (pencil) in the header (Figure 16–47).

Figure 16–46 Personalize Icon in Recent Topics



The Show panel displays, where you can select or deselect additional data (Figure 16–47).

Figure 16–47 Show Panel in Recent Topics



3. Select the data you want to show, or deselect the data check box you want to hide. Select or deselect one or more from:
 - **Author**—The user name of the person who posted the topic
 - **Date**—The date the topic was last updated
 - **Replies**—The replies associated with the topic
4. Click **Save** to save your changes and close the panel.

16.2.3.4 Showing or Hiding Information in Watched Forums

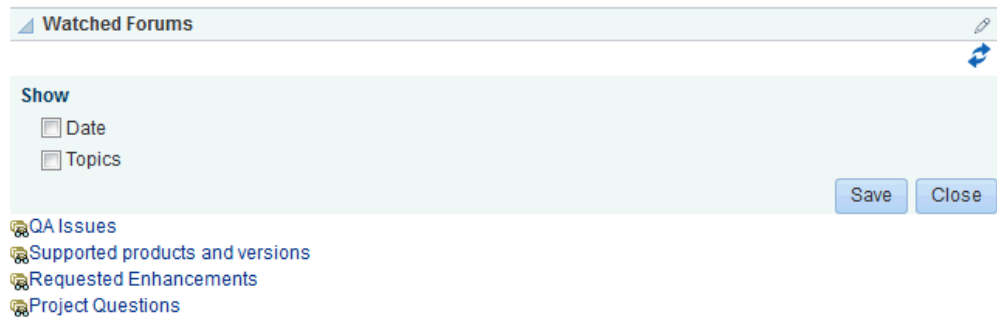
To show or hide additional information in Watched Forums:

1. Go to the Watched Forums view where you want to show or hide additional information.
2. Click the **Personalize** (pencil) icon in the header (Figure 16–48).

Figure 16–48 Personalize Icon in Watched Forums



The Show panel displays, where you can select or deselect additional data (Figure 16–49).

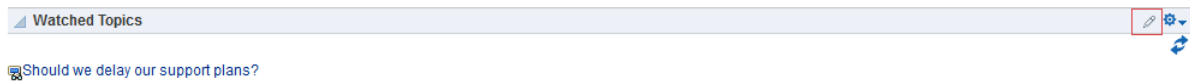
Figure 16–49 Show Panel in Watched Forums

3. Select the data you want to show, or deselect the check box of the data you want to hide. Select or deselect one or more from:
 - **Date**—The date the forum was last updated
 - **Topics**—The topics associated with the forum
4. Click **Save** to save your changes and close the panel.

16.2.3.5 Showing or Hiding Information in Watched Topics

To show or hide additional information in Watched Topics:

1. Go to the Watched Topics view where you want to show or hide additional information.
2. Click the **Personalize** icon (pencil) in the header (Figure 16–50).

Figure 16–50 Personalize Icon in Watched Topics

The Show panel displays, where you can select or deselect additional data (Figure 16–51).

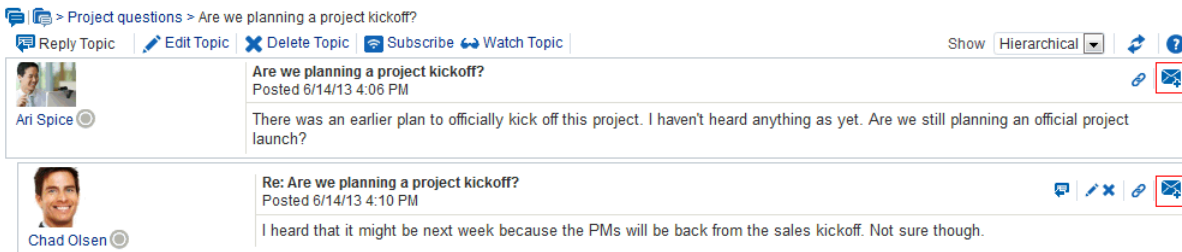
Figure 16–51 Show Panel in Watched Topics

3. Select the data you want to show, or deselect the data check box you want to hide. Select or deselect one or more from:
 - **Author**—The user name of the person who posted the topic
 - **Date**—The date the topic was last updated
 - **Replies**—The replies associated with the topic
4. Click **Save** to save your changes and close the panel.

16.2.4 Sending Mail from Discussion Topics

Each discussion topic has an associated **Send Mail** icon in its toolbar (Figure 16–52). Click the **Send Mail** icon to initiate a mail message containing the discussion text, location, author, and date it was created. This feature makes it easy for you to communicate interesting discussions to others.

Figure 16–52 Send Mail Icons on Discussion Topics



The portal moderator determines the mail client to use with the **Send Mail** icon. If a local mail client was specified, then a plain text message opens (if you have not logged into your mail application, you will be prompted to do so). If WebCenter Portal's Mail service was set as the mail client, then the HTML Mail Compose dialog opens. With either mail client, you can add or edit the standard, perpetuated message before sending.

Working with Wikis

This chapter describes how to create, edit, and manage wikis, which multiple users can use to create and edit content that is relevant, useful, and up-to-date.

This chapter includes the following topics:

- [Section 17.1, "About Wikis"](#)
- [Section 17.2, "Creating a Wiki"](#)
- [Section 17.3, "Editing a Wiki"](#)
- [Section 17.4, "Exposing an Existing Wiki Document in the Portal Navigation"](#)
- [Section 17.5, "Managing Wiki Documents"](#)

Note: The tasks described in this chapter are available only if the system administrator and portal moderator have made wiki functionality available in WebCenter Portal and the current portal, as described in the "Prerequisites for Enabling Wiki Functionality" section in *Building Portals with Oracle WebCenter Portal*.

Permissions: To perform the tasks in this chapter, you need the following permissions:

- To use the **New Wiki Document** action and work with wiki documents: in the Home portal on the **Documents** page, any authenticated user can create new wiki documents; in other portals, you need the portal-level permission `Create Documents` (which includes delete permissions on wiki documents that you create). To delete wiki documents that are not your own, you must have `Delete Documents` permission.
 - To view or post comments on wiki documents, you need only the `View Documents` permission.
 - To view a wiki page, you need the `View Page` permission. This permission is granted to all authenticated users by default. To edit a wiki page, you need to be granted `Edit` permissions on the page.
 - To create a personal page using the Wiki page style, you need the application-level permission `Pages: Create`. This permission is granted to all authenticated users by default, allowing them to create and manage their personal pages in the Home portal.
-
-

17.1 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.

In WebCenter Portal, you can create a wiki using either of the following methods:

- Create a *wiki document* using the **New Wiki Document** action, available on the **Documents** page or in the Document Explorer, Document Manager, or Folder Viewer on a page. See [Section 17.2.1, "Creating a Wiki Document Using the New Wiki Document Action."](#)
- Create a *wiki page* using the Wiki page style, to support a dedicated wiki page with a default wiki document that offers a simplified user interface and a dedicated wiki experience. See [Section 17.2.2, "Creating a Wiki Using the Wiki Page Style."](#)

Wikis created using either of the two methods offer the same in-place editing features through the Rich Text Editor (RTE).

The method you choose for creating a wiki really depends on your preferences. If you want to create a wiki as a page in your portal, exposed in the portal navigation, use the Wiki page style method. If you just want to create a wiki document (among other types of documents) in your portal's document hierarchy, use the **New Wiki Document** action.

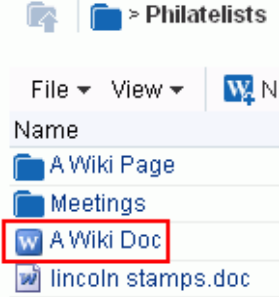

[Table 17-1](#) summarizes the differences between the two methods of creating wiki documents to help you decide which method to choose:

Table 17-1 Distinguishing Features Between Methods of Creating Wikis

Feature	New Wiki Document Action (Section 17.2.1, "Creating a Wiki Document Using the New Wiki Document Action")	Wiki Page Style (Section 17.2.2, "Creating a Wiki Using the Wiki Page Style")
Wiki exposure	Does not display wiki as a link in the portal navigation.	Includes the wiki as a link in the portal navigation. The screenshot shows an example of navigation to a wiki page in a portal using the default side navigation page template.



Table 17-1 (Cont.) Distinguishing Features Between Methods of Creating Wikis

Feature	New Wiki Document Action (Section 17.2.1, "Creating a Wiki Document Using the New Wiki Document Action")	Wiki Page Style (Section 17.2.2, "Creating a Wiki Using the Wiki Page Style")
Wiki storage	<p>A wiki document is exposed on the Documents page of the portal, just like any other file.</p> 	<p>A wiki page is exposed on the Documents page of the portal as a <i>folder</i>, just like any other page. The folder contains a default wiki document, with the same name as the page name.</p> 
Permissions inherited by a wiki	<p>Inherits permissions from the folder in which it is created.</p>	<p>In a portal, the newly created wiki page inherits portal permissions (where Moderator and Participant roles have Create, Edit, and Delete permissions, and Viewer role has only View permission).</p> <p>In the Home portal, a newly created wiki page inherits the same permissions as a public folder; the owner is granted the Administrator, Read, Write, and Delete permissions, and public users are granted only the Read access.</p>
Permissions required to create wiki	<p>Create Documents</p>	<ul style="list-style-type: none"> ■ Create Pages or Create, Edit, Delete Pages ■ Assets: Edit Assets (simple permission model) or Navigations: Edit Navigations (advanced permission model) ■ Create Documents

17.2 Creating a Wiki

The following sections describe how to create a wiki in WebCenter Portal:

- [Section 17.2.1, "Creating a Wiki Document Using the New Wiki Document Action"](#)
- [Section 17.2.2, "Creating a Wiki Using the Wiki Page Style"](#)
- [Section 17.2.3, "Creating a Wiki Document Within a Wiki Page"](#)

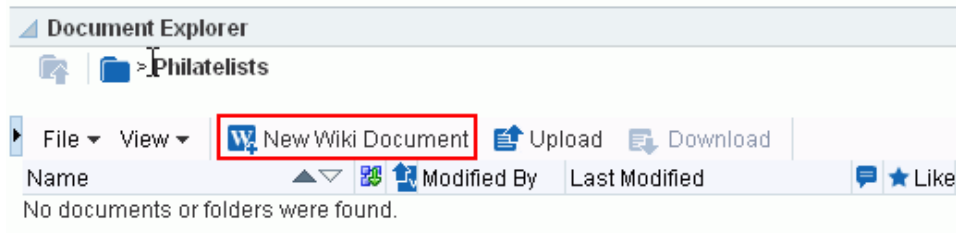
17.2.1 Creating a Wiki Document Using the New Wiki Document Action

To understand the differences between the two methods of creating a wiki, see [Section 17.1, "About Wikis."](#)

To create a wiki using the **New Wiki Document** action:

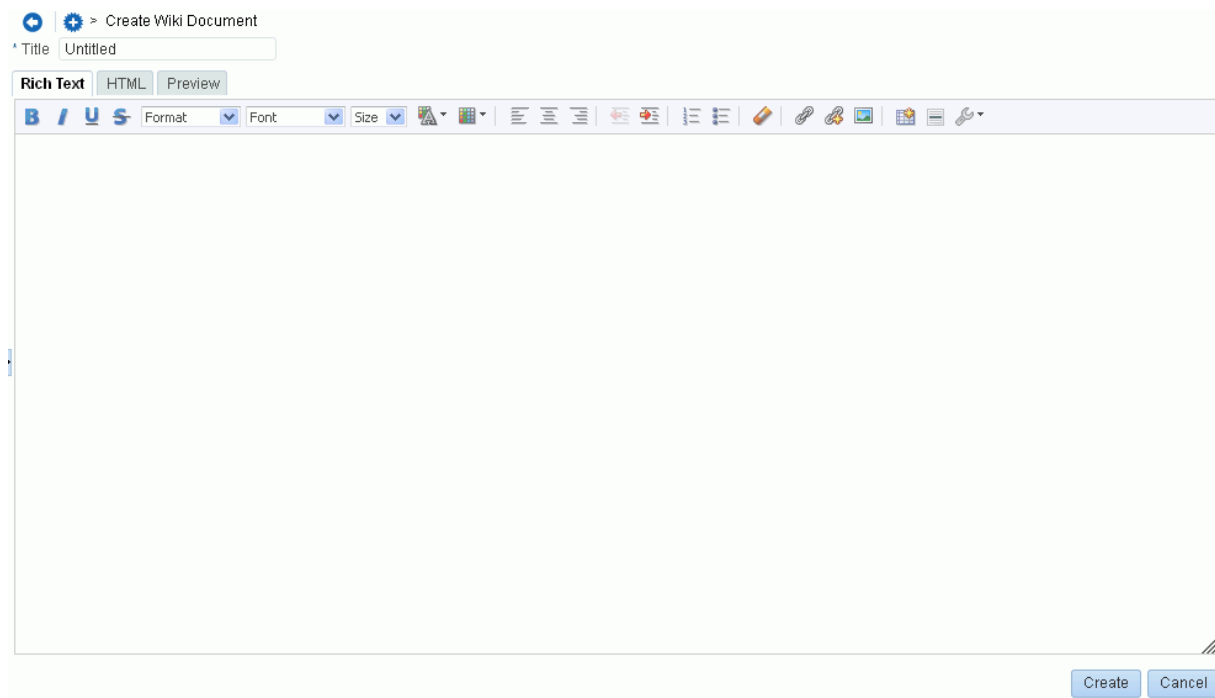
1. On the **Documents** page or in the Document Explorer, Document Manager, or Folder Viewer on a page, browse to the folder where you want to create a wiki document.
2. Click **New Wiki Document** (Figure 17-1).

Figure 17-1 *Creating a New Wiki Document*



The Rich Text Editor (RTE) opens (Figure 17-2), displaying a blank wiki document.

Figure 17-2 *Rich Text Editor Displaying New Wiki Document*



3. In the **Title** field, enter a display name for the wiki document.

Note: When naming wiki documents, the following characters are not allowed:

? # & \ / * " | < > : ^

Letters, numbers, spaces, single quotes ('), and periods (.) are allowed.

4. Add and preview the text, formatting, styling, and links in the **Rich Text**, **Wiki Markup** (if shown), **HTML**, and/or **Preview** tabbed panes.

Notes:

- For information about using the toolbar and features in the **Rich Text** pane, see [Section 19.7, "Using the Rich Text Editor \(RTE\)."](#)
- Apple iPad users cannot make selections from drop-down lists in the RTE. This is a known limitation.
- By default, the **Wiki Markup** tab is hidden in the RTE. Your system administrator can change this setting, as described in the "Showing and Hiding the Wiki Markup Tab in the Rich Text Editor" section in *Administering Oracle WebCenter Portal*.
- If you switch from the **Wiki Markup** tab to another tab in the RTE, your content might become garbled. As a workaround, if you go to the **Wiki Markup** tab, click **Save and Close** or **Cancel** rather than switching to another tab in the RTE.

5. Click **Create** to save your changes and exit the editor.

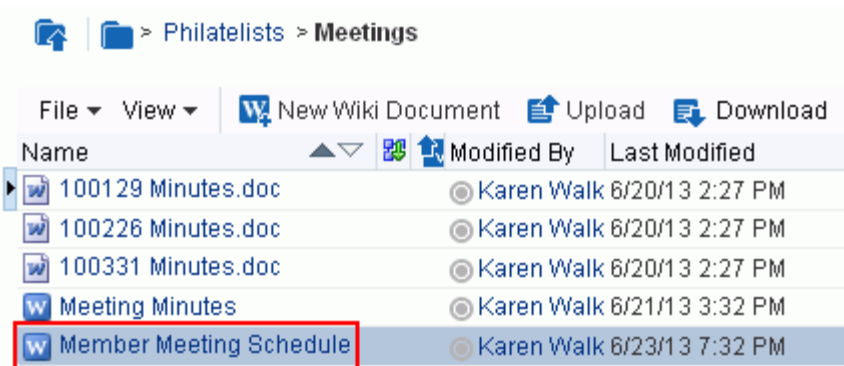
The new wiki document displays in the Document Viewer, ready to be viewed and edited by other portal members ([Figure 17-3](#)). For information about the tasks that can be performed on a wiki besides editing it, see [Section 17.5, "Managing Wiki Documents."](#)

Figure 17-3 Wiki Document Created Using New Wiki Document Action



On the **Documents** page in the portal, the new wiki document (Member Meeting Schedule) is saved as a document in the current folder, as shown in [Figure 17-4](#).

Figure 17-4 Wiki Document Created Using New Wiki Document Action



17.2.2 Creating a Wiki Using the Wiki Page Style

To understand the differences between the two methods of creating a wiki, see [Section 17.1, "About Wikis."](#)

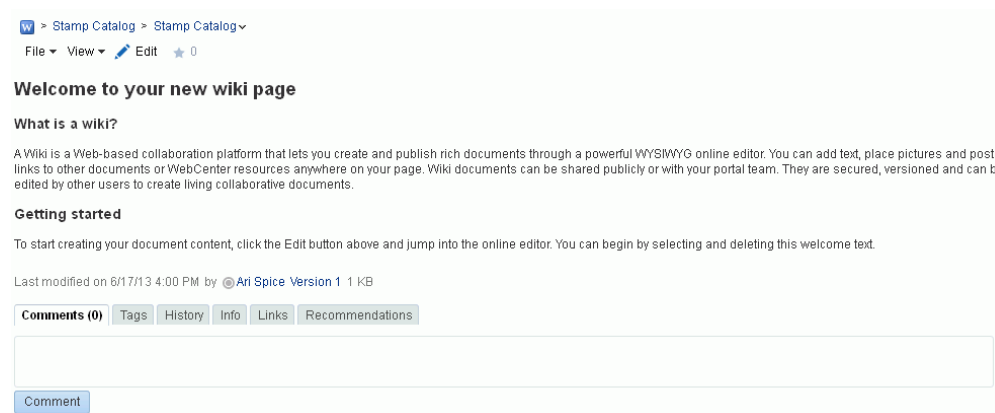
You can create a dedicated wiki page using the Wiki page style as either:

- A personal page in the Home portal, selecting **Wiki** as the page style. See [Section 9.3.2, "Creating a Personal Page."](#)
- A portal page in a portal, selecting **Wiki** as the page style. This is an advanced task, described in the "Creating a Page or Subpage in an Existing Portal" section in *Building Portals with Oracle WebCenter Portal*.

Wikis created using either of the two methods offer the same in-place editing features through the Rich Text Editor (RTE), described in [Section 19.7, "Using the Rich Text Editor \(RTE\)."](#)

In both cases, the initial wiki page, containing a default wiki document with default text, looks similar to [Figure 17-5](#). For information about the tasks that can be performed on a wiki besides editing it, see [Section 17.5, "Managing Wiki Documents."](#)

Figure 17-5 Default Wiki Document Created Using the Wiki Page Style



The breadcrumbs at the top display the path where the wiki document is created in the document hierarchy. In the wiki document, you can replace the default text with the desired content. For information, see [Section 17.3, "Editing a Wiki."](#)

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 17–6](#). Both the folder and the default wiki document share the same name.

Figure 17–6 Default Wiki Document for a Wiki Page in the Document Hierarchy



17.2.3 Creating a Wiki Document Within a Wiki Page

A page based on the Wiki page style contains a default wiki document. Anyone with appropriate permissions on the wiki page can create additional wiki documents using the **New Wiki Document** action. These wiki documents are siblings of the default wiki document, and are all stored in the dedicated folder that is automatically created for the wiki page.

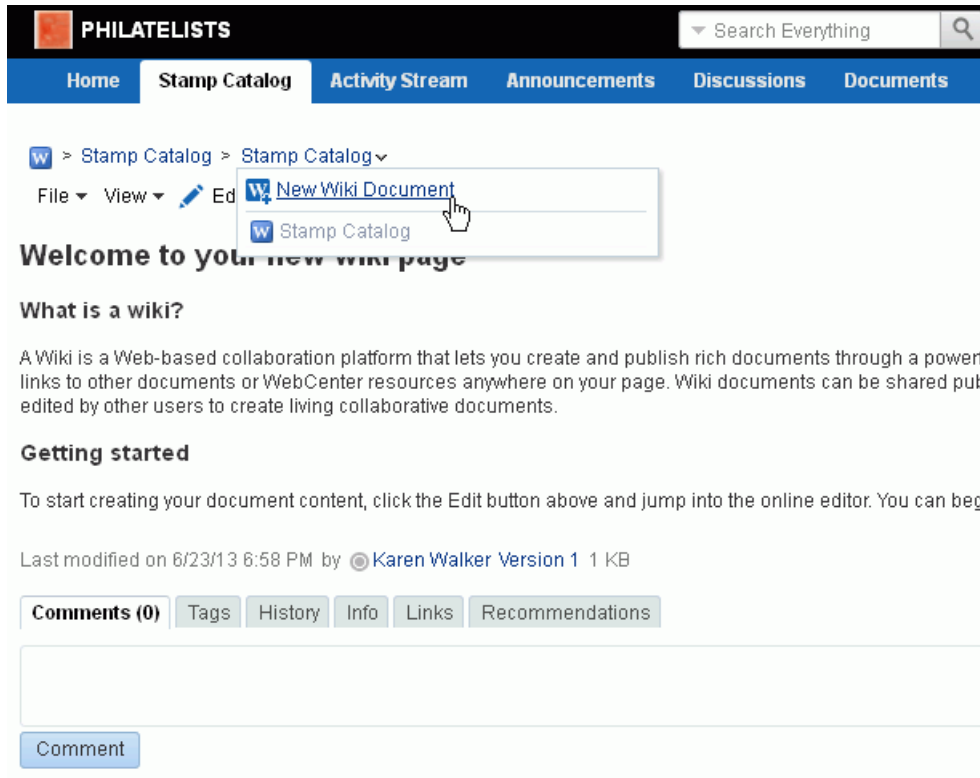
You can create an additional wiki document within a wiki page in either of the following ways:

- Navigate to the folder for the page, and create a new wiki document as described in [Section 17.2.1, "Creating a Wiki Document Using the New Wiki Document Action."](#)
- Navigate to the wiki page and select the **New Wiki Document** action, as described in the following steps:
 1. In the wiki page, select the **New Wiki Document** action.

The way you select this action depends on the page template used in your portal.

[Figure 17–7](#) shows a wiki page open in a portal that uses a side navigation page template. Clicking the page name in the breadcrumbs or the drop-down arrow next to the page name displays a menu that contains the **New Wiki Document** action.

Figure 17–7 The New Wiki Document Option Available for a Wiki Page



2. In the Rich Text Editor (RTE), in the **Title** field, enter a name for the new wiki document (for example, *Project Plan*).
3. Add, revise, and preview text, formatting, styling, and links in the **Rich Text**, **HTML**, **Wiki Markup** (if shown), and/or **Preview** tabbed panes.

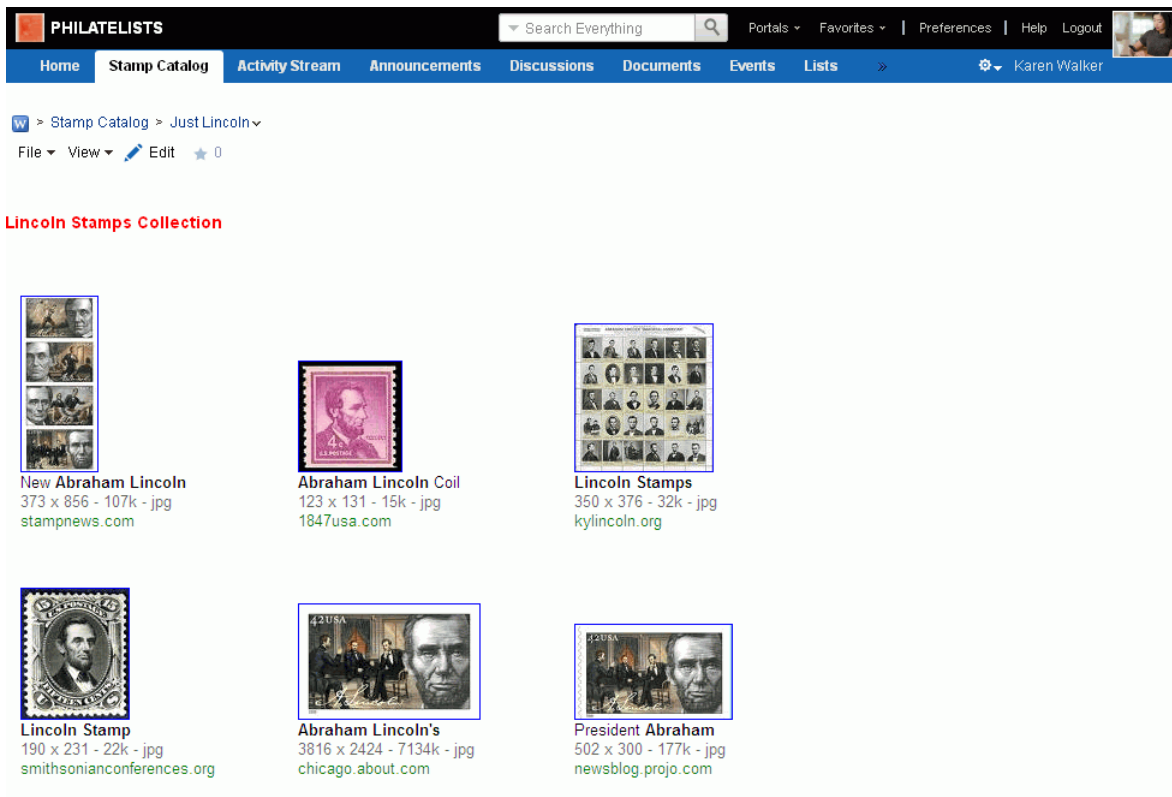
Notes:

- For information about using the toolbar and features in the **Rich Text** pane, see [Section 19.7, "Using the Rich Text Editor \(RTE\)."](#)
 - Apple iPad users cannot make selections from drop-down lists in the RTE. This is a known limitation.
 - By default, the **Wiki Markup** tab is hidden in the RTE. Your system administrator can change this setting, as described in the "Showing and Hiding the Wiki Markup Tab in the Rich Text Editor" section in *Administering Oracle WebCenter Portal*.
 - If you switch from the **Wiki Markup** tab to another tab in the RTE, your content might become garbled. As a workaround, if you go to the **Wiki Markup** tab, click **Save and Close** or **Cancel** rather than switching to another tab in the RTE.
-
-

4. Click **Create** to save your changes and exit the editor.

The new wiki document displays in the Document Viewer, ready to be edited by other portal members ([Figure 17–8](#)). For information about the tasks that can be performed on a wiki besides editing it, see [Section 17.5, "Managing Wiki Documents."](#)

Figure 17–8 New Wiki Document Associated with a Wiki Page



On the **Documents** page in the portal, the new wiki document (Just Lincoln) is saved as a document under its parent wiki folder (Stamp Catalog), along with the wiki document created as the default wiki page document (Stamp Catalog), as shown in Figure 17–9.

Figure 17–9 Wiki Document Created Within a Wiki Page



In the wiki page, the drop-down arrow next to the page name in the breadcrumbs displays a menu that includes the wiki documents created within the page (in this example, Just Lincoln) (Figure 17–10).

Figure 17–10 List of Wiki Documents Associated with Wiki Page



17.3 Editing a Wiki

You use the Rich Text Editor (RTE) to add or revise the content of your wiki documents.

Note: The Rich Text Editor (RTE) can edit wiki documents up to 1MB in size. For wiki documents larger than 1MB, the **Edit** action is not active.

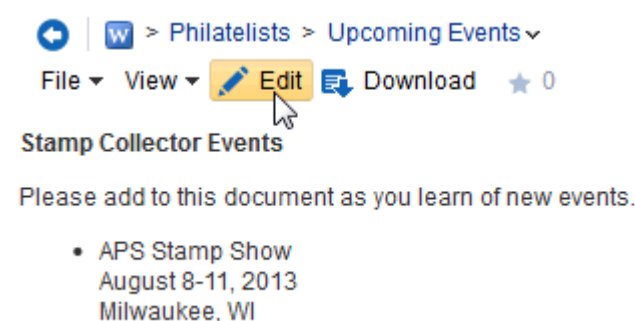
When you open a wiki document for editing, WebCenter Portal automatically checks the file out. If another user is already editing a wiki document when you try to open it, you will see a message that the wiki document has already been checked out. On the **Documents** page (or in the Document Explorer, Document Manager, or Folder Viewer on a page), a lock icon displays alongside a wiki document that is checked out. When you hover the mouse cursor over the lock icon, the name of the user who has checked out the wiki document displays.

Whenever you save changes to a wiki document, WebCenter Portal automatically checks the file in and creates a new version of the wiki document. This means that the last saved version of a wiki document appears as the current version.

To edit a wiki:

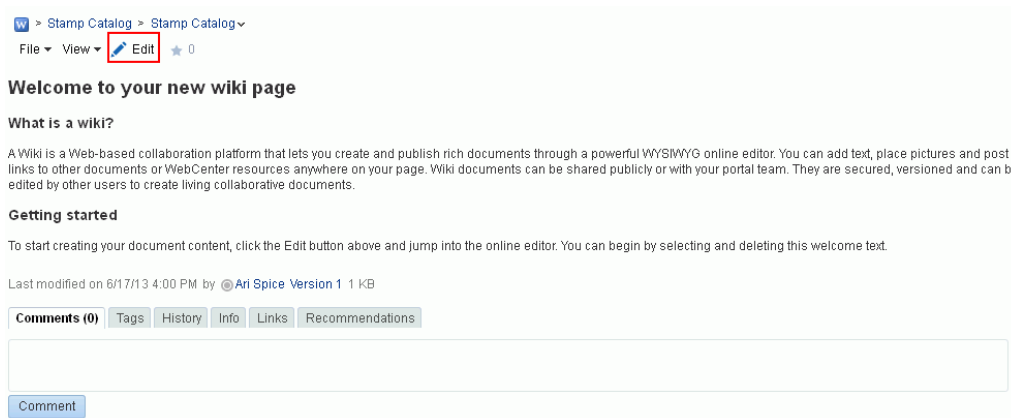
1. Open a wiki in edit mode in any of the following ways, depending on your view:
 - On the **Documents** page or in the Document Explorer, Document Manager, or Folder Viewer on a page, click in the row of the wiki document you want to edit. From the **File** menu, select **Edit**, or right-click the file and select **Edit** from the context menu to open the wiki document in the RTE.
 - In the Document Viewer preview pane, click the **Edit** action (Figure 17–11).

Figure 17–11 Editing a Wiki Document



- In a wiki page, click the **Edit** action to edit the default wiki document.

Figure 17–12 Editing a Wiki Page



- In a wiki page, click the drop-down arrow next to the page name in the breadcrumbs to select and open a wiki document created within the page. (Figure 17–13), then click the **Edit** action.

Figure 17–13 List of Wiki Documents Associated with Wiki Page



2. In the RTE, add, revise, and preview text, formatting, styling, and links in the **Rich Text**, **HTML**, **Wiki Markup** (if shown), and/or **Preview** tabbed panes.

Notes:

- For information about using the toolbar and features in the **Rich Text** pane, see [Section 19.7, "Using the Rich Text Editor \(RTE\)."](#)
 - Apple iPad users cannot make selections from drop-down lists in the RTE. This is a known limitation.
 - By default, the **Wiki Markup** tab is hidden in the RTE. Your system administrator can change this setting, as described in the "Showing and Hiding the Wiki Markup Tab in the Rich Text Editor" section in *Administering Oracle WebCenter Portal*.
 - If you switch from the **Wiki Markup** tab to another tab in the RTE, your content might become garbled. As a workaround, if you go to the **Wiki Markup** tab, click **Save and Close** or **Cancel** rather than switching to another tab in the RTE.
-
-

3. Select the **Minor Edit?** check box if you do not want to notify portal members about your changes.
Leaving this check box deselected updates the Activity Stream and sends notifications after you save your changes.
4. Click **Save** to save your changes and continue editing, or click **Save and Close** to save your changes and exit the editor.

17.4 Exposing an Existing Wiki Document in the Portal Navigation

This section includes the following topics:

- [Section 17.4.1, "Exposing an Existing Wiki Document as a Wiki Page"](#)
- [Section 17.4.2, "Exposing an Existing Wiki Document Using Content Presenter"](#)

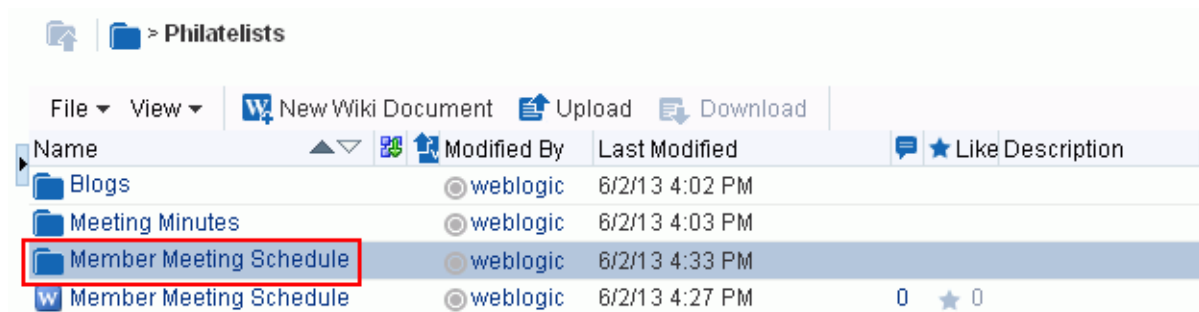
17.4.1 Exposing an Existing Wiki Document as a Wiki Page

When you create a wiki page using the Wiki page style, it is listed in the document hierarchy, and is exposed as a separate page in the portal navigation. However, when you create a wiki document using the **New Wiki Document** action, the wiki document is listed in only in the document hierarchy. For easy access to such a wiki document, you can publish it to appear as a page in the portal navigation.

To publish an existing wiki document as a page in the portal navigation:

1. On the **Documents** page or in the Document Explorer, Document Manager, or Folder Viewer on a page, create a folder with the same name as the existing wiki document at the root level of the portal (see [Section 19.4, "Creating a Folder"](#)). For example, if the existing wiki document is named *Member Meeting Schedule*, create a folder named *Member Meeting Schedule* ([Figure 17-14](#)).

Figure 17-14 Folder Created at the Portal Root Level



2. Move (drag) the existing wiki document into the newly created folder (see [Section 19.11, "Moving Folders and Files"](#)).

Note: The wiki document must have been originally created using the **New Wiki Document** action, as described in [Section 17.2.1, "Creating a Wiki Document Using the New Wiki Document Action."](#)

3. Create a new page in the portal, selecting the **Wiki** page style.

Tip: The way you create a new page depends on the page template used for the portal. For example, the portal may display an **Actions** menu, where you can select **Create Page**.

4. In the **Title** field, enter the display name of the existing wiki document that you want to expose; for example, `Member Meeting Schedule`.

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

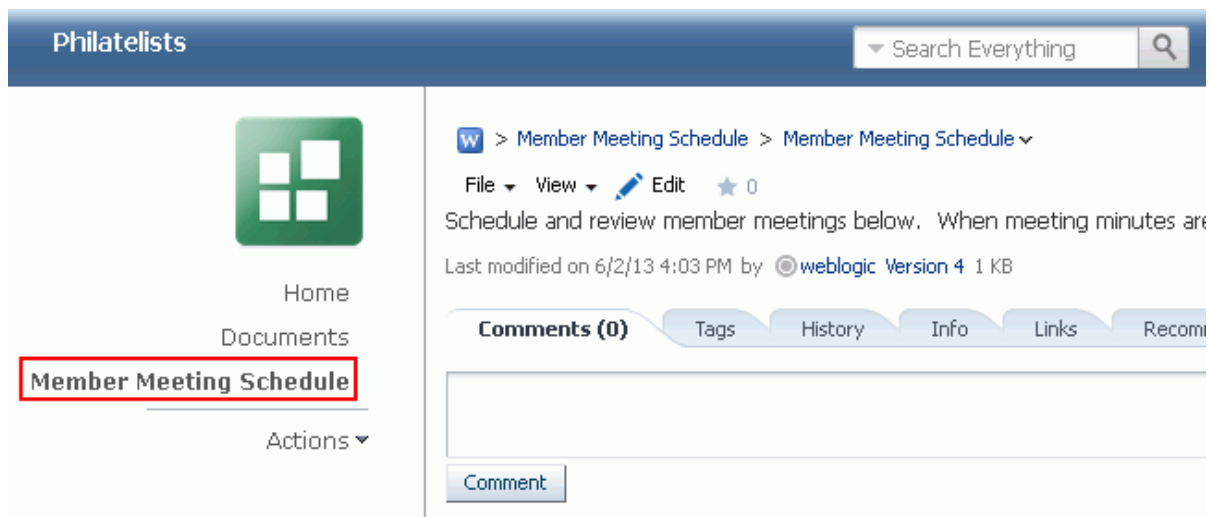
? # & \ / * " | < > : ^

For example, if you create a wiki page named "what's In a Name?", the page will have this title, but the associated wiki document will be named `_What's In a Name_`.

5. Click **Create**.

The wiki document is now exposed as a separate page in the navigation area. The location depends on the page template used by your portal. [Figure 17–15](#) shows the `Member Meeting Schedule` wiki document exposed as a page in the navigation area in a portal. For information about the tasks that can be performed on a wiki besides editing it, see [Section 17.5, "Managing Wiki Documents."](#)

Figure 17–15 A Wiki Document Exposed as a Page



17.4.2 Exposing an Existing Wiki Document Using Content Presenter

Content Presenter allows you to select a wiki document, and render its content in a specific template on a page. This is an advanced task, covered in the "Publishing Content Using Content Presenter" chapter in *Building Portals with Oracle WebCenter Portal*.

17.5 Managing Wiki Documents

Table 17–2 lists the tasks that you can perform to manage wiki documents, with links to the steps that describe how to perform each task for any file.

Table 17–2 *Managing Wiki Documents*

Task	Description	For more information, see...
Opening a wiki document for viewing	<p>You can open a wiki document on the Documents page or in the Document Explorer, Document Manager, or Folder Viewer on a page. You can also open a wiki document in a browser.</p> <p>If your wiki document is exposed through a wiki page, you can open the wiki page, then access the wiki document from the wiki page's drop-down menu, as shown in Figure 17–10.</p>	Section 19.6.2, "Opening a File"
Downloading a wiki document	<p>You can download a wiki document from the content repository to your local file system. You can access the Download action from the Documents page, the Document Explorer, Document Manager, or Folder Viewer, or the Document Viewer preview pane.</p> <p>Note: WebCenter Portal does not support uploading a new wiki document or a new version of a wiki document from the file system. If you upload an HTML file, you cannot convert it to a wiki document due to differences in underlying metadata.</p>	Section 19.8.3, "Downloading a File"
Renaming a wiki document	You can rename a wiki document as desired.	Section 19.9, "Renaming a Folder or File" Section 19.17.2, "Working with File Properties"
Deleting a wiki document	You can delete a wiki document if it is no longer required.	Section 19.12, "Deleting Folders and Files"
Viewing, adding, and deleting comments on a wiki document	<p>You can associate comments with a wiki document to provide additional information that you may want to convey to other users about it.</p> <p>Note: A user with view-only permissions can add comments to a wiki document in the Comments pane. The comment display is limited to 500 characters.</p>	Section 15.4, "Commenting on Items"

Table 17-2 (Cont.) Managing Wiki Documents

Task	Description	For more information, see...
Viewing and adding tags to a wiki document	You can add tags to a wiki document to specify keywords related to the content of the post to make it more widely discoverable in search results.	Section 19.15, "Managing Tags on Files"
Viewing and deleting versions of a wiki document	Every time you save a wiki document, WebCenter Portal saves a new version of the wiki and maintains the version history. You can view and delete the various versions. However, you cannot restore an older version of a wiki document.	Section 19.16, "Viewing and Deleting File Version History"
Viewing and modifying properties of a wiki document	You can view the basic and advanced properties associated with a wiki document. However, you can modify only the name and description of a wiki document.	Section 19.17.2, "Working with File Properties"
Viewing and adding links to a wiki document (requires Create Links permission)	Using the Select Resource and New Resource icons in the RTE, you can add links from a wiki document to existing resources, or create and link to new resources. Note that these inline links are not added to the Links tab associated with the details of the wiki document.	Table 19-4, "Rich Text Editor Toolbar Icons and Controls on Rich Text Tab" (Select Resource and New Resource icons)
Opening or saving wiki documents as PDF files	You can open or save the PDF version of the currently open wiki document. This choice is available if Content Server is configured to convert wiki documents to PDF format, and your system administrator must configure the WebCenter Conversion component, as described in the "Enabling the Conversion of Wikis and Blogs into PDFs" section in <i>Administering Oracle WebCenter Portal</i> .	Section 19.6.3, "Opening or Saving PDF Files"
Sharing the URL of a wiki document in Activity Streams or through a mail message	You can directly access a wiki document using its URL. You can retrieve the URL, share it by publishing it to Activity Streams, or sending it in a mail message.	Section 19.21, "Sharing the URL for a Folder or File"

Table 17-2 (Cont.) Managing Wiki Documents

Task	Description	For more information, see...
Setting up the security for a wiki document	<p>You can secure a wiki document by setting custom access permissions or choosing to inherit the permissions of the parent folder.</p> <p>The option to set security for wiki documents is available if item level security has been enabled on Content Server.</p>	Section 19.22, "Setting Security Options on a Folder or File"
Subscribing to a wiki document	You can subscribe to a wiki document to receive notifications for activities such as comments, likes, updates, or deletions. You are notified through your selected messaging channel.	Section 19.23, "Subscribing to a File" and Section 22.3.2, "Setting Portal-Level Subscriptions."
Liking or unliking a wiki document	To indicate that a wiki document is of particular interest to you, you can "like" it. If a wiki document is already liked, you can "unlike" it if you no longer wish to highlight your preference.	Section 19.24, "Liking a File"
Adding a wiki document to your favorites	For quick access to a wiki document, you can add it to your personal favorites.	Section 19.25, "Adding a Folder or File to Your Favorites"

Working with Blogs

This chapter describes how to subscribe to a blog, create a blog page, and work with blog posts to record experiences and opinions.

This chapter includes the following topics:

- [Section 18.1, "About Blogs"](#)
- [Section 18.2, "Understanding the Blog Page Style"](#)
- [Section 18.3, "Creating a Blog Using the Blog Page Style"](#)
- [Section 18.4, "Subscribing to a Blog"](#)
- [Section 18.5, "Working with Blog Posts"](#)

Note: The tasks described in this chapter are available only if the system administrator and portal moderator have made blog functionality available in WebCenter Portal and the current portal, as described in the "Prerequisites for Enabling Blog Functionality" section in *Building Portals with Oracle WebCenter Portal*.

Permissions: To perform the tasks in this chapter, you need the following permissions:

- To create and manage with blog posts: in the Home portal, any authenticated user can add and manage their own blog posts in an existing blog; in other portals, you need the portal-level permission `Create Documents` (which includes delete permissions on blog posts that you create). To delete blog posts that are not your own, you must have `Delete Documents` permission.
 - To view or post comments on blog posts, you need only the `View Documents` permission.
 - To view a blog page, you need the `View Page` permission. This permission is granted to all authenticated users by default. To edit a blog page, you need to be granted `Edit` permissions on the page.
 - To create a personal page using the Blog page style, you need the application-level permission `Pages: Create`. This permission is granted to all authenticated users by default, allowing them to create and manage their personal pages in the Home portal
-
-

18.1 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

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 two methods:

- Blog task flows (components), to expose a customized blog view on a page along with other page components. This is an advanced task, described in the "Working with Blog Task Flows" section in *Building Portals with Oracle WebCenter Portal*. After blog task flows have been added to a page, you can working with them, as described in [Section 18.5, "Working with Blog Posts."](#)
- Blog page style, to create a dedicated blog page. See [Section 18.2, "Understanding the Blog Page Style"](#) and [Section 18.3, "Creating a Blog Using the Blog Page Style."](#)

18.2 Understanding the Blog Page Style

Out-of-the-box, the WebCenter Portal includes several page styles for selection when creating a new page. One of these page styles is the Blog page style, which enables you to create a dedicated blog page ([Figure 18–1](#)).

Figure 18–1 *Blog Page Displaying Blog Post*

The screenshot shows a web page titled "MyBlog". At the top left, there is a "New Post" button. Below it, there are two blog entries. The first entry is titled "Philatelists Club?" and is by Robert Davis, created on 4/29/13 1:28 PM. The second entry is titled "Presidential Stamps" and is also by Robert Davis, created on 4/29/13 12:32 PM. On the right side of the page, there are two sections: "Archives" which shows "2013 (2)" and "April (2)", and "Recent Posts" which shows "Philatelists Club?" and "Presidential Stamps".

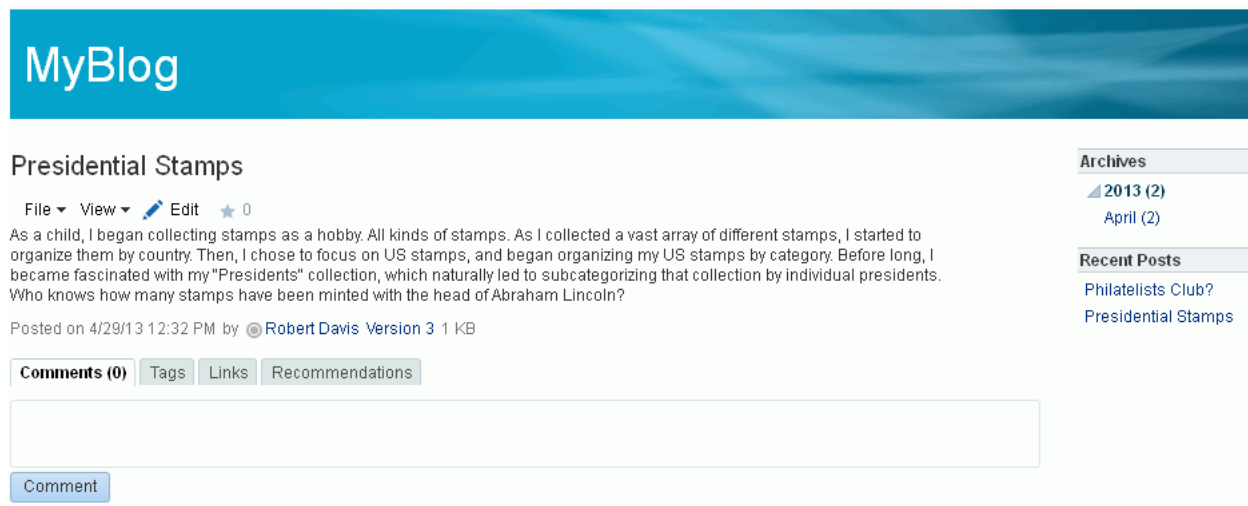
On a blog page, the **Archives** section on the right provides links to blog posts by year and by month, including the current month. Clicking a month displays all blog posts created during that month. Every time you add a blog post, that post is added to the archive for the current month.

A blog page displays various details for each blog post. These include the blog post title, the blog post content, date of creation or modification, name of the user who created or last modified the post, and the number of comments on the blog post.

Authorized users can click the **Edit Post** (pencil) icon to edit a post and also add comments, tags, and links on the corresponding tabs at the bottom of the post. An authenticated (logged in to WebCenter Portal) user with view-only permissions can add comments to a blog post by clicking the **comments** link below the post. Public users can not comment on blog posts.

Clicking a blog post title opens the blog post to occupy the entire the blog page (Figure 18–2), providing controls to manage the blog post.

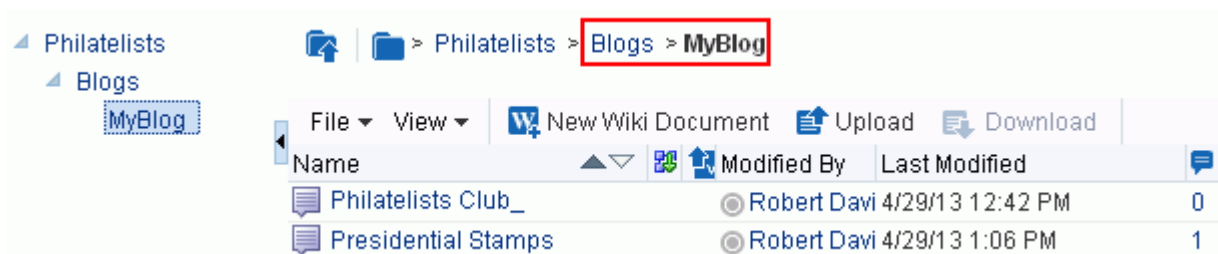
Figure 18–2 A Blog Post



In a portal or the Home portal, blog pages are stored in a separate folder named **Blogs** under the root folder of the portal in the document hierarchy. When you create a new blog page, an empty folder is created for that blog under the **Blogs** folder. All blog posts that you create in that blog are stored in the blog's folder.

Figure 18–3 illustrates the directory structure for the example **MyBlog**, which contains two blog posts. The breadcrumb at the top shows that the blog posts are created in the **MyBlog** folder in the portal.

Figure 18–3 Directory Structure of a Blog



18.3 Creating a Blog Using the Blog Page Style

To understand the differences between the two methods of creating a blog, see Section 18.1, "About Blogs."

You can create a dedicated blog page using the Blog page style as either:

- A personal page in the Home portal, selecting **Blog** as the page style. See [Section 9.3.2, "Creating a Personal Page."](#)
- A portal page in a portal, selecting **Blog** as the page style. This is an advanced task, described in the "Creating a Page or Subpage in an Existing Portal" section in *Building Portals with Oracle WebCenter Portal*.

In both cases, the initial blog page you create looks similar to [Figure 18–4](#). For more information, see [Section 18.2, "Understanding the Blog Page Style."](#)

Figure 18–4 A New Blog Created Using the Blog Page Style



18.4 Subscribing to a Blog

You can subscribe to be notified whenever a blog entry is posted or commented upon in a portal. Owning a blog does not automatically subscribe a blog owner to it. A blog owner must also explicitly subscribe to receive blog notifications. For information about how to subscribe to a blog, see [Section 22.3.2, "Setting Portal-Level Subscriptions."](#) Whenever there is a change, you are notified through your selected messaging channel. For information about messaging channels, see [Section 22.2, "Establishing and Managing Your Messaging Channels and Filters."](#)

There is no subscription available for blogs in the Home portal. However, you can subscribe to be notified of changes to specific blog posts. For information about subscribing to a specific blog post, see [Section 18.5.6, "Managing Blog Posts."](#)

18.5 Working with Blog Posts

The following sections describe how to add and manage blog posts:

- [Section 18.5.1, "About Blog Posts"](#)
- [Section 18.5.2, "Creating a Blog Post"](#)
- [Section 18.5.3, "Viewing a Blog Post"](#)
- [Section 18.5.4, "Editing a Blog Post"](#)
- [Section 18.5.5, "Deleting a Blog Post"](#)
- [Section 18.5.6, "Managing Blog Posts"](#)

18.5.1 About Blog Posts

For each blog post, you can use the controls to perform tasks such as edit, subscribe to, share, and comment on the post ([Figure 18–5](#)). For information about these tasks, see [Section 18.5.6, "Managing Blog Posts."](#)

Figure 18–5 A Blog Post

The screenshot shows a blog post interface. At the top is a blue header with the text 'MyBlog'. Below the header, the post title 'Presidential Stamps' is displayed. To the right of the title are icons for 'File', 'View', 'Edit', and a star icon with a '0' next to it. The main content of the post is a paragraph of text about collecting stamps. Below the text, it says 'Posted on 4/29/13 12:32 PM by Robert Davis Version 3 1 KB'. There are three tabs: 'Comments (0)', 'Tags', and 'Links', with 'Recommendations' also visible. A large text input field is present, with a 'Comment' button below it. On the right side, there are two sidebar sections: 'Archives' showing '2013 (2)' and 'April (2)', and 'Recent Posts' showing 'Philatelists Club?' and 'Presidential Stamps'.

When you create a blog post, a file is created in the content repository with the same name as the blog post title. Subsequently, you can change the blog post title when editing the blog post, but keep in mind that this changes only the display title; the name of the file for the blog post remains the original name. Therefore, you cannot later create a new blog post with the same initial title as the original title, as that file name already exists.

You use the Rich Text Editor (RTE) to add the content and style elements to a blog post. The RTE provides features such as the ability to embed images, create new resources on the fly, and add content. For more information, see [Section 19.7, "Using the Rich Text Editor \(RTE\)."](#)

By default, the entire content of a blog post gets displayed on the blog page. You can choose to display only a selected paragraph by using the **Snippet** icon in the RTE (see [Table 19–4, "Rich Text Editor Toolbar Icons and Controls on Rich Text Tab"](#)).

When you create a blog post, the `Type` property of the blog post file is set to `Blog Post` ([Figure 18–6](#)). To view the properties of a blog post file, see [Section 19.17.2, "Working with File Properties."](#)

Figure 18–6 Blog Post Type



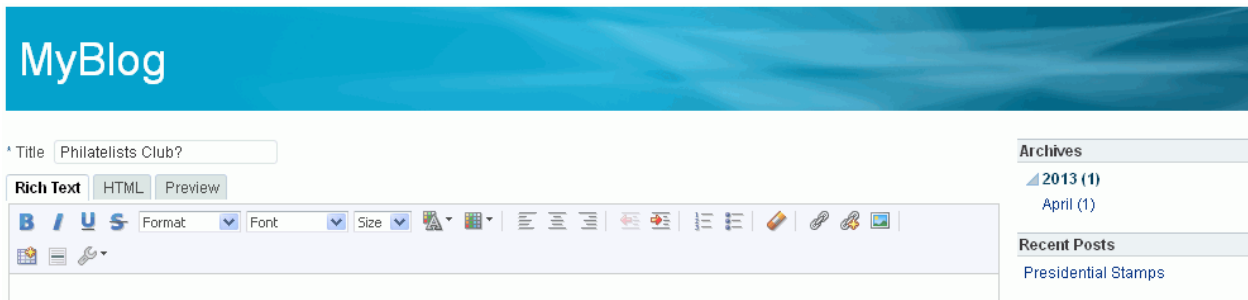
18.5.2 Creating a Blog Post

To create a blog post:

1. Navigate to the blog in which you want to create a blog post.
2. Click **New Post** to open the Rich Text Editor (RTE).
3. In the RTE, in the **Title** field, enter a display name for the blog post (Figure 18–7), up to 250 characters. Special characters (such as \ / : [] * ' " | ?) are allowed.

Note: The initial title you give a blog post becomes the name of the file that is created in the content repository for the blog post. Subsequently, you can change the blog post title when editing the blog post, but keep in mind that this changes only the display title; the name of the file for the blog post remains the original file name. Therefore, you cannot later create a new blog post with the same initial title as the original title, as that file name already exists. No matter what title you give a blog post, you can always edit the blog post and change the title.

Figure 18–7 Creating a Blog Post



4. Add and preview the text, formatting, and styling in the **Rich Text**, **HTML**, and/or **Preview** tabbed panes. For information about working with the RTE, see [Section 19.7, "Using the Rich Text Editor \(RTE\)."](#)
5. On the **Preview** tab, choose a mode for publishing the blog post:
 - **Draft:** Select to mark the blog post as a draft. On a blog page, a draft blog post is marked as "Draft". Only the author of a blog post and portal moderators can view draft posts. Users with just the viewing permissions can view only published posts.
 - **Publish:** Select to publish the blog post. On a blog page, a published post is marked as "Posted".

By default, a post is published with the current date and time details. If you want the blog post to be published on a future date and time, use the date picker. The blog post will be published automatically on the specified date.

Note: The Activity Stream shows a blog post that has a publish date, regardless of the publish date. Only draft posts are not listed in the Activity Stream.

6. Click **Create** to save your changes and exit the editor.

The new blog post appears as the top-most entry in its blog ([Figure 18-3](#)). For information about the tasks that can be performed on a blog post besides editing it, see [Section 18.5.6, "Managing Blog Posts."](#)

Figure 18-8 Blog Page Displaying Blog Post

The screenshot shows a blog page with a blue header containing the text "MyBlog". Below the header, there is a "New Post" button with a plus icon. The main content area displays two blog posts. The first post is titled "Philatelists Club?" and includes a small profile picture of a man, a link to a website, and creation information. The second post is titled "Presidential Stamps" and includes a similar profile picture, a paragraph of text, and creation information. On the right side, there is a sidebar with "Archives" showing "2013 (2)" and "April (2)", and "Recent Posts" listing "Philatelists Club?" and "Presidential Stamps".

On the **Documents** page in the portal, the new blog post is saved as a document under its parent blog folder (*MyBlog*), which in turn, is stored under the *Blogs* folder, as shown in [Figure 18-9](#).

Figure 18–9 Blog and Blog Post in the Document Hierarchy

18.5.3 Viewing a Blog Post

You can view a blog post by opening the page in which it resides, or by opening it as a document in the Document Viewer preview pane.

To view a blog post on a blog page:

- Open the page containing the blog, or created used the Blog page style. The way you open the page depends on the page template in use in your portal.

Figure 18–10 shows a blog post on a page created using the Blog page style.

Figure 18–10 Opening a Blog Post on a Blog Page

To view a blog post in a Document Viewer preview pane:

1. On the **Documents** page or in the Document Explorer, Document Manager, or Folder Viewer on a page, navigate to the Blogs folder.
2. Open the blog folder that contains the blog post, then click the blog post file (Figure 18–11) to open it in the Document Viewer preview pane

Figure 18–11 Blog and Blog Post in the Document Hierarchy

From the Document Viewer preview pane, if you want to view just the content of the blog post in a separate tab in your browser, click the **View** menu, and select **Open in Browser**.

18.5.4 Editing a Blog Post

You use the Rich Text Editor (RTE) to add or revise the content of your blog posts.

When you open a blog post for editing, WebCenter Portal automatically checks the file out. If another user is already editing a blog post when you try to open it, the Documents service displays a message that the blog post has already been checked out. On the **Documents** page or in the Document Explorer, Document Manager, or Folder Viewer on a page, a lock icon displays alongside a blog post that is checked out. When you hover the mouse cursor over the lock icon, the name of the user who has checked out the blog post displays.

Whenever you save changes to a blog post, WebCenter Portal automatically checks the file in and creates a new version of the blog post. This means that the last saved version of a blog post appears as the current version.

To edit a blog post:

1. Open your blog post in edit mode in any of the following ways, depending on your view:
 - On the **Documents** page, or in the Document Explorer, Document Manager, or Folder Viewer on a page, click in the row of the blog post file you want to edit, then click the **File** menu, and select **Edit**, or right-click the file and select **Edit** from the context menu to open the blog post in the RTE.
 - In the Document Viewer preview pane, click the **Edit** action.
 - In a blog page or a blog component on a page, click the **Edit Post** (pencil) icon for the required blog post.
 - In a blog page or a blog component on a page, open the blog post by clicking its title, then click the **Edit** action.
2. In the RTE, add, revise, and preview text, formatting, and styling in the **Rich Text**, **HTML**, and/or **Preview** tabbed panes. For information about working with the RTE, see [Section 19.7, "Using the Rich Text Editor \(RTE\)."](#)
3. Click **Save** to save your changes and continue editing, or click **Save and Close** to save your changes and exit the editor.

18.5.5 Deleting a Blog Post

You can delete a blog post in the following two ways:

- In a blog page or a blog component on a page, click the **Delete Post** icon ([Figure 18–12](#)) for the required blog post.

Figure 18–12 Deleting a Blog Post

- Navigate to the blog post on the **Documents** page or the Document Explorer, Document Manager, or Folder Viewer, and delete the blog post file as described in [Section 19.12, "Deleting Folders and Files."](#)

18.5.6 Managing Blog Posts

[Table 18–1](#) lists the tasks that you can perform to manage blog posts, with links to the steps that describe how to perform each task for any file.

Table 18–1 Managing Blog Posts

Task	Description	Documentation
Opening a blog post for viewing	<p>You can open a blog post on the Documents page or in the Document Explorer, Document Manager, or Folder Viewer on a page. You can also open a blog post in a browser.</p> <p>If your blog post is exposed through a blog page, you can open the blog page to view the blog post in the page.</p>	Section 18.5.3, "Viewing a Blog Post"
Downloading a blog post	<p>You can download blog posts from the content repository to your local file system. You can access the Download action from the Documents page, the Document Explorer, Document Manager, or Folder Viewer, or the Document Viewer preview pane.</p> <p>The Download action is not available when you open a blog post directly from the page that contains it.</p> <p>Note: WebCenter Portal does not support uploading a blog post from the file system. If you upload an HTML file, you cannot convert it to a blog post due to differences in underlying metadata.</p>	Section 19.8.3, "Downloading a File"
Renaming a blog post	You can rename a blog post as desired.	Section 19.9, "Renaming a Folder or File" Section 19.17.2, "Working with File Properties"
Deleting a blog post	You can delete a blog post if it is no longer pertinent.	Section 18.5.5, "Deleting a Blog Post"

Table 18–1 (Cont.) Managing Blog Posts

Task	Description	Documentation
Viewing, adding, and deleting comments on a blog post	You can associate comments with a blog post to provide additional information that you may want to convey to other users about it. Note: A user with view-only permissions can add comments to a blog post by clicking the comments link below the post. The comment display is limited to 500 characters.	Section 15.4, "Commenting on Items"
Viewing and adding tags to a blog post	You can add tags to a blog post to specify keywords related to the content of the post to make it more widely discoverable in search results.	Section 19.15, "Managing Tags on Files"
Viewing and deleting versions of a blog post	Every time you save a blog post, WebCenter Portal saves a new version of the post and maintains the version history. You can view and delete the various versions. However, you cannot restore an older version of a blog post	Section 19.16, "Viewing and Deleting File Version History"
Viewing and modifying properties of a blog post	You can view the basic and advanced properties associated with a blog post. However, you can modify only the name and description of a blog post.	Section 19.17.2, "Working with File Properties"
Viewing and adding links to other resources (requires Create Links permission)	Using the Select Resource and New Resource icons in the RTE, you can add links from a blog post to existing resources, or create and link to new resources. Note that these inline links are not added to the Links tab associated with the details of the blog post.	Table 19–4, "Rich Text Editor Toolbar Icons and Controls on Rich Text Tab" (Select Resource and New Resource icons)
Opening or saving blog posts as PDF files	You can open or save the PDF version of the currently open blog post. This choice is available if Content Server is configured to convert blog posts to PDF format, and your system administrator must configure the WebCenter Conversion component, as described in the "Enabling the Conversion of Wikis and Blogs into PDFs" section in <i>Administering Oracle WebCenter Portal</i> .	Section 19.6.3, "Opening or Saving PDF Files"
Sharing the URL of a blog post in Activity Streams or through a mail message	You can directly access a blog post by using its URL. You can retrieve the URL, share it by publishing it to Activity Streams, or send it in a mail message.	Section 19.21, "Sharing the URL for a Folder or File"

Table 18–1 (Cont.) Managing Blog Posts

Task	Description	Documentation
Subscribing to a blog post	You can subscribe to a blog post to receive notifications for activities such comments, likes, updates, or deletions. You are notified through your selected messaging channel.	Section 19.23, "Subscribing to a File" and Section 22.3.2, "Setting Portal-Level Subscriptions."
Liking or unliking a blog post	To indicate that a blog post is of particular interest to you, you can "like" it. If a post is already liked, you can "unlike" it if you no longer wish to highlight your preference.	Section 19.24, "Liking a File"
Adding a blog post to your favorites	For quick access to a blog post, you can add it to your personal favorites.	Section 19.25, "Adding a Folder or File to Your Favorites"

Part IV

Working with Documents

Part IV contains the following chapters:

- [Chapter 19, "Creating and Managing Documents"](#)
- [Chapter 20, "Collaborating on Documents"](#)
- [Chapter 21, "Working with Microsoft Office and Explorer Integration"](#)

Creating and Managing Documents

This chapter describes how to create and manage content in WebCenter Portal.

This chapter contains the following topics:

- [Section 19.1, "About Creating and Managing Documents in WebCenter Portal"](#)
- [Section 19.2, "Actions for Working with Folders and Files"](#)
- [Section 19.3, "Personalizing Your View of Documents"](#)
- [Section 19.4, "Creating a Folder"](#)
- [Section 19.5, "Creating a File"](#)
- [Section 19.6, "Opening a Folder or File"](#)
- [Section 19.7, "Using the Rich Text Editor \(RTE\)"](#)
- [Section 19.8, "Editing or Updating a File"](#)
- [Section 19.9, "Renaming a Folder or File"](#)
- [Section 19.10, "Copying and Pasting Folders and Files"](#)
- [Section 19.11, "Moving Folders and Files"](#)
- [Section 19.12, "Deleting Folders and Files"](#)
- [Section 19.13, "Refreshing Folder Contents"](#)
- [Section 19.14, "Hiding and Showing Folders"](#)
- [Section 19.15, "Managing Tags on Files"](#)
- [Section 19.16, "Viewing and Deleting File Version History"](#)
- [Section 19.17, "Working with Folder and File Properties"](#)
- [Section 19.18, "Managing Document Links"](#)
- [Section 19.19, "Viewing Document Recommendations"](#)
- [Section 19.20, "Opening or Saving PDF Files"](#)
- [Section 19.21, "Sharing the URL for a Folder or File"](#)
- [Section 19.22, "Setting Security Options on a Folder or File"](#)
- [Section 19.23, "Subscribing to a File"](#)
- [Section 19.24, "Liking a File"](#)
- [Section 19.25, "Adding a Folder or File to Your Favorites"](#)
- [Section 19.26, "Searching for Documents"](#)

- [Section 19.27, "Working with Workflow-Enabled Content"](#)

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

To perform the tasks in this chapter on portal pages, you need the portal-level permissions `Customize Pages and Edit Content` and `Create Documents` (which includes delete permissions on documents that you create), granted by the portal moderator. To delete documents that are not your own, you must have `Delete Documents` permission.

To set security on a document in a portal, you must have `Documents: Administration` permission, granted by the portal moderator.

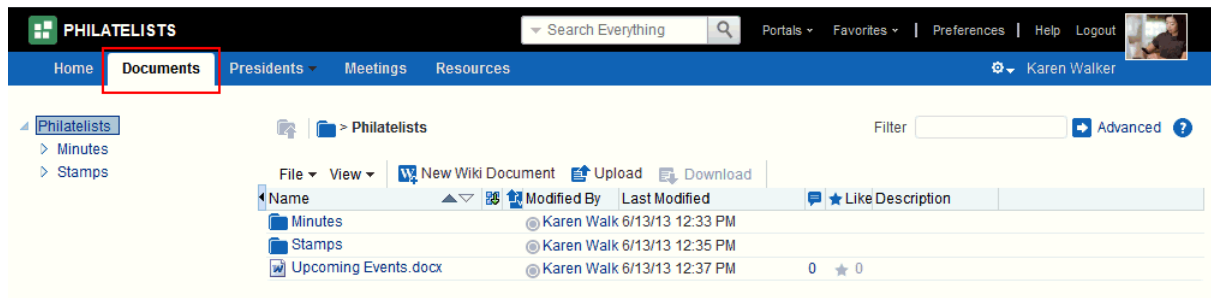
For information about roles and permissions, see the "Understanding Permissions and Permission Models in a Portal" section in *Building Portals with Oracle WebCenter Portal*.

19.1 About Creating and Managing Documents in WebCenter Portal

In WebCenter Portal, you can create and manage documents at runtime in a variety of ways:

- *Content Presenter* provides the ability to edit wiki documents, HTML files, or Site Studio files in-context, and create new Site Studio files in the connected Content Server content repository. Using Content Presenter is an advanced task, described in the "Publishing Content Using Content Presenter" chapter in *Building Portals with Oracle WebCenter Portal*.
- The *Documents* feature provides several views that offer capabilities to create, open, edit, delete, copy, rename, move, share, search, view, and manage information about folders and files in any connected content repository, including wikis and blogs. An application specialist may expose the **Documents** page in a portal ([Figure 19–1](#)), or add one or more document views to a page to allow you to create and manage documents. The following sections describe the document views that may be available to you on a portal page:
 - [Section 19.1.1, "About the Document Explorer"](#)
 - [Section 19.1.2, "About the Document Manager"](#)
 - [Section 19.1.3, "About the Folder Viewer"](#)
 - [Section 19.1.4, "About the Document Viewer"](#)

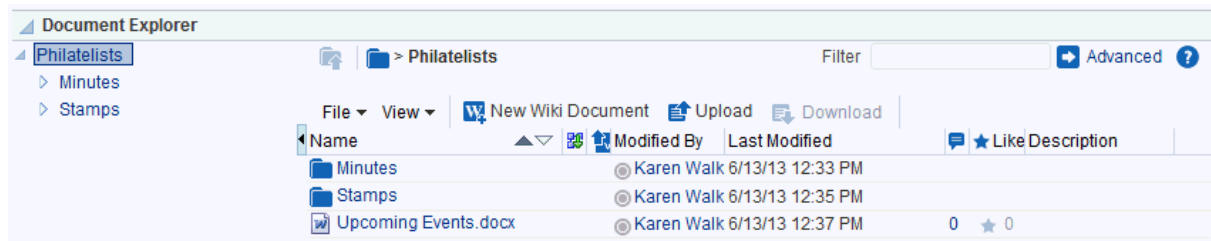
Figure 19–1 Documents Page in a Portal



19.1.1 About the Document Explorer

The Document Explorer displays a list of folders and files in two panes. The left pane shows folders in a nested hierarchy, and the right pane shows the contents of the currently selected folder (Figure 19–2).

Figure 19–2 Document Explorer



If you see only a single pane (default), click the **Restore Pane** icon at the middle-left of the list of documents.

Conversely, click the Collapse Pane icon at the middle-left to hide the left pane.

In the Document Explorer, 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) or if you are using an Apple iOS device, the preview pane displays the file properties (see [Section 19.1.4, "About the Document Viewer"](#)) rather than a preview of the file content.
- 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 19.2, "Actions for Working with Folders and Files"](#)).

Alternatively, right-click a folder or file to display a context menu of available actions.

- Drag and drop folders and files in the hierarchy to reorganize the file or folder structure.

19.1.2 About the Document Manager

The Document Manager displays folders and files as specified by its *Layout* property, which is set by the application specialist:

- **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 19–3). This layout is very similar to the Document Explorer.
- **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 19–4).
- **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 19–5). This layout may be familiar to Mac OS X users.

Figure 19–3 Document Manager: Explorer Layout

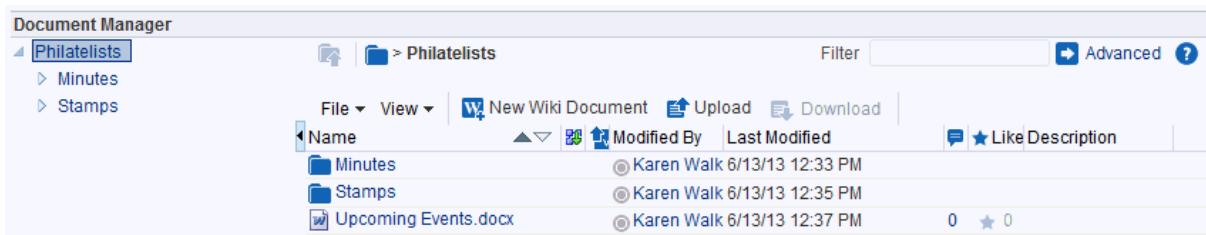


Figure 19–4 Document Manager: Table Layout

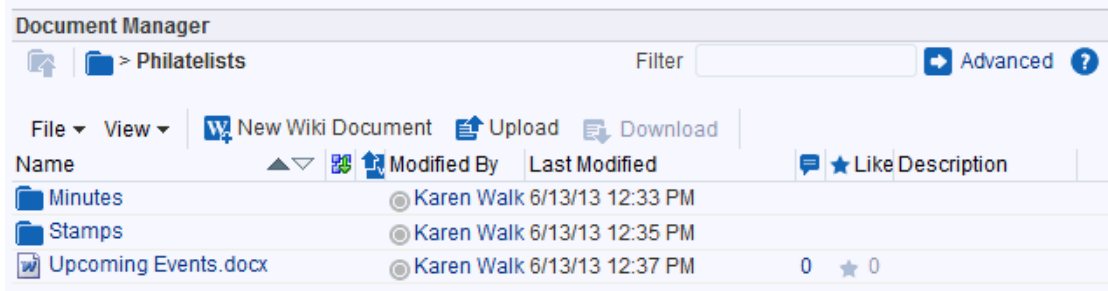
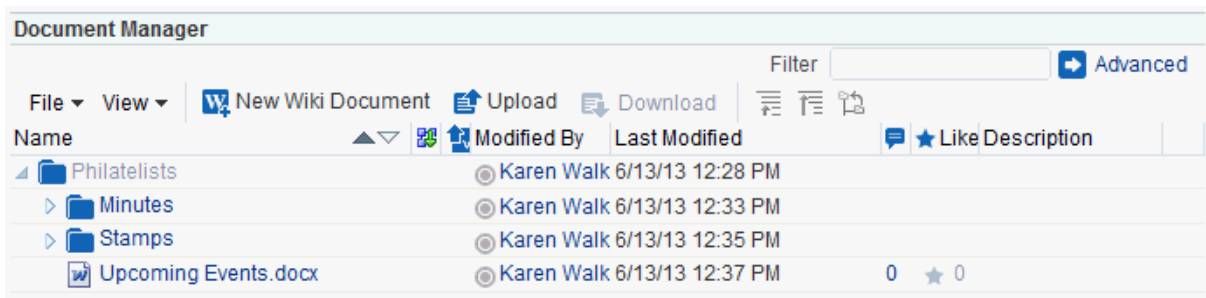


Figure 19–5 Document Manager: Tree Table Layout



In the Document Manager, 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) or if you are using an Apple iOS device, the preview pane displays the file properties (see [Section 19.1.4, "About the Document Viewer"](#)) rather than a preview of the file content.
- 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 19.2, "Actions for Working with Folders and Files"](#)).

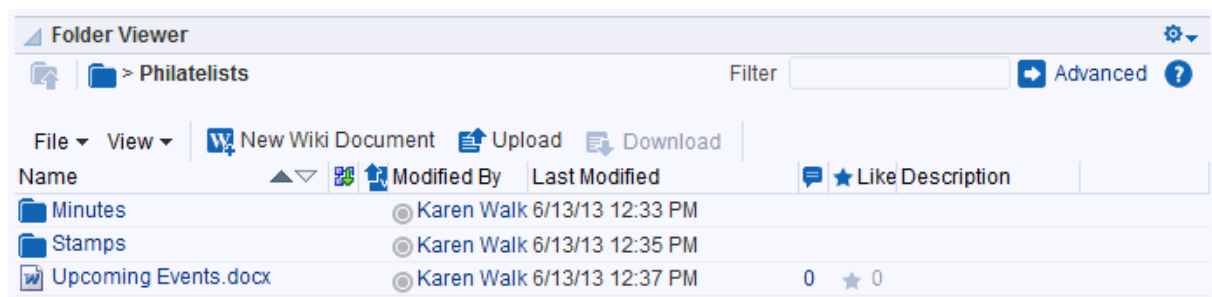
Alternatively, right-click a folder or file to display a context menu of available actions.

- Drag and drop folders and files in the hierarchy to reorganize the file or folder structure.

19.1.3 About the Folder Viewer

The Folder Viewer displays the contents of a folder in a single pane as a flat listing ([Figure 19–6](#)), 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.

Figure 19–6 Folder Viewer



In the Folder Viewer, 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) or if you are using an Apple iOS device, the preview pane displays the file properties (see [Section 19.1.4, "About the Document Viewer"](#)) rather than a preview of the file content.
- 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 19.2, "Actions for Working with Folders and Files"](#)).

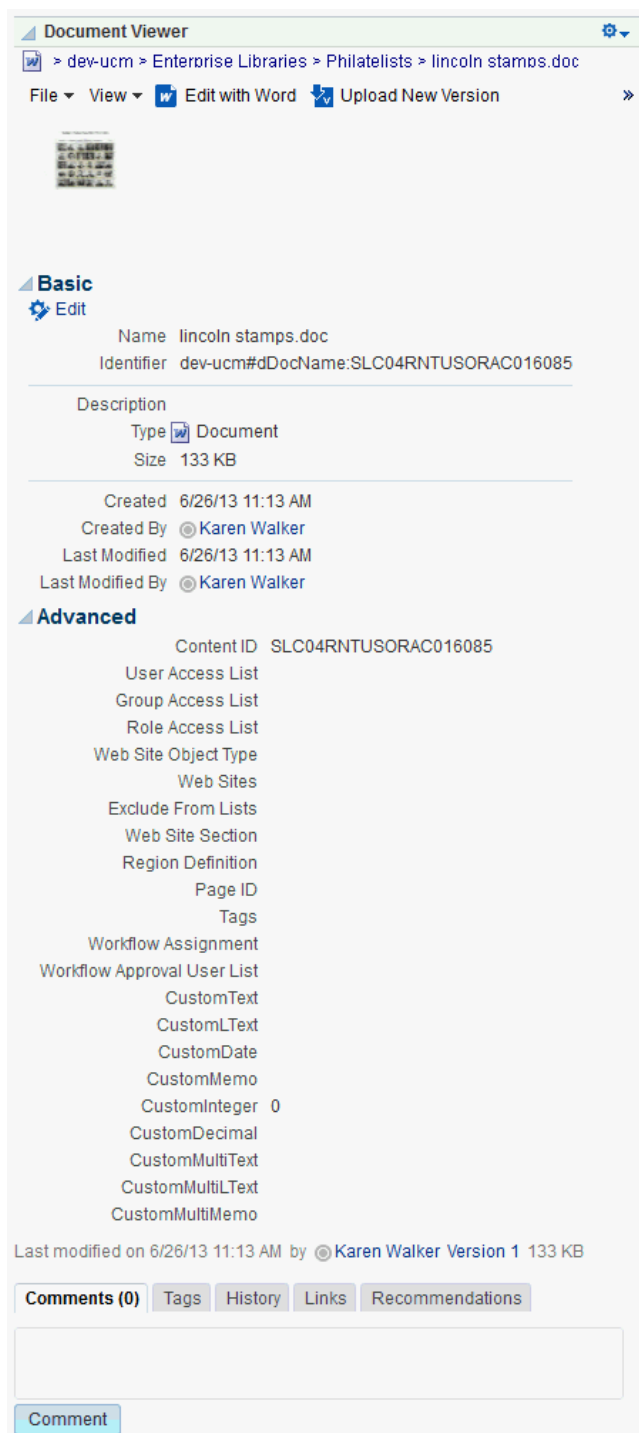
Alternatively, right-click a folder or file to display a context menu of available actions.

- Drag and drop folders and files in the hierarchy to reorganize the file or folder structure.

19.1.4 About the Document Viewer

The Document Viewer displays the contents and/or properties of a file or folder (Figure 19–7).

Figure 19–7 Document Viewer



The Document Viewer displays different content depending on the type of item selected to appear (wiki document, Microsoft file, image, and so on):

- **Toolbar with menus and actions**
For all item types; the options differ depending on the item type (see [Section 19.2, "Actions for Working with Folders and Files"](#))
- **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 [Section 15.4, "Commenting on Items."](#)
 - **Tags:** Specifies keywords related to the content of the file. Tags are useful for making a file more widely discoverable in search results. See [Section 19.15, "Managing Tags on Files."](#)
 - **History:** Provides version information about the current file, and allows you to selectively delete versions. For more information, see [Section 19.16, "Viewing and Deleting File Version History."](#)
 - **Info:** Provides the option to edit some properties such as file name and description. In the Advanced section, displays metadata property settings for the file. See [Section 19.17, "Working with Folder and File Properties."](#)
 - **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 [Section 19.18, "Managing Document Links."](#)
 - **Recommendations:** Provides suggestions of other documents you might want to view, based on the current document. See [Section 19.19, "Viewing Document Recommendations."](#)

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.

19.2 Actions for Working with Folders and Files

The actions for working with folders and files available in the Document view toolbars (menus and buttons) and context menus are summarized in the following sections:

- [Section 19.2.1, "Folder and File Actions in List Viewers"](#)
- [Section 19.2.2, "File and Folder Actions in the Document Viewer"](#)

19.2.1 Folder and File Actions in List Viewers

Table 19–1 summarizes the folder and file management options when viewing a listing of folders and/or files (for example, on the Documents page, in the Document Manager, in the Document Explorer, in the Folder Viewer, or in the Document List Viewer). These options are available from the menus and buttons in the viewer toolbars and from the context menu that appears when you right-click a folder or file.

Table 19–1 Actions for Folders and Files

Location	Actions	Applicable to:	Description
File menu or context menu	Edit or Edit with <i>Application</i>	file	For a selected file, opens the file in-place and automatically checks the file out. Wiki documents and HTML files open in RTE; Office files open in their corresponding application. See Section 19.8.4, "Editing Files In-Place." Available for wiki documents, blog posts, HTML, and Microsoft Office (Word, Excel, and PowerPoint) files only.
File menu or context menu	Upload New Version	file	If you have write permissions on a selected file, opens the Upload Document pane where you can specify a new version of the file to upload to replace the existing file. See Section 19.8.5, "Uploading a New Version of an Existing File." Not available for wiki documents or blog posts.
File menu and context menu	Check Out	file	For a selected file, checks the file out, locking it for update by other users. See Section 19.8.1, "Checking a File Out." Not available for wiki documents or blog posts.
File menu and context menu	Cancel Check Out	file	For a selected file, cancels the checked out status without updating it, unlocking it to allowing other users to update it. See Section 19.8.1, "Checking a File Out." Not available for wiki documents or blog posts.
File menu	New Folder	folder	Opens the Create Folder dialog where you can specify a name for a new folder. See Section 19.4, "Creating a Folder."
File menu and context menu	Rename	folder or file	Opens the Rename dialog where you can rename the selected folder or file. See Section 19.9.1, "Renaming a Folder or File Using a Menu."
File menu and context menu	Cut	folder or file	Stores the path to the selected folder(s) or file(s) to paste elsewhere. If a folder or file is not subsequently pasted, it is restored to the location where it was cut. If a folder or file is deleted at the source location before pasting, it will not be moved to the paste location. See Section 19.11, "Moving Folders and Files."

Table 19–1 (Cont.) Actions for Folders and Files

Location	Actions	Applicable to:	Description
File menu and context menu	Copy	folder or file	Stores the path to the selected folder or file to paste as a copy elsewhere. If a folder or file is deleted at the source location before pasting, it will not be copied to the paste location. See Section 19.10, "Copying and Pasting Folders and Files."
File menu	Paste	folder or file	Pastes the folder or file in the buffer to the current folder. See Section 19.10, "Copying and Pasting Folders and Files."
File menu and context menu	Delete	folder or file	Deletes the selected folder or file. See Section 19.12, "Deleting Folders and Files."
File menu and context menu	Share	file	Opens a dialog where you specify the users, groups, or select a portal where the URL for the selected file will be published in Activity Streams, along with a message. See Section 19.21.3, "Publishing the URL for a File to Activity Streams."
File menu and context menu	Security	folder or file	Opens the Security Settings dialog, where you can set custom access permissions for the selected file, or select to inherit the permissions of the parent folder. For more information, see Section 19.22, "Setting Security Options on a Folder or File." Available only if your system administrator has configured item-level security between Content Server and WebCenter Portal.
Context menu	Open	folder or file	Opens a folder to display its contents and make it the top-level folder. See Section 19.6.1, "Opening a Folder."
View menu and context menu	Details	folder or file	Opens the folder or file in the Document Viewer, where you see the properties and/or preview of the folder or file. For more information, see Section 19.1.4, "About the Document Viewer."
View menu and context menu	Get a Link	folder or file	Opens the Get a Link dialog, where Direct URL provides a direct link to open the folder or file in WebCenter Portal. For files, the Download URL provides a direct link to allow users to open the file in its default application, or choose to save the file to their local file system. See Section 19.21, "Sharing the URL for a Folder or File."
View menu	Containing Folder Info	folder or file	Opens the Properties pane of the parent folder of the current folder or file. See Section 19.17, "Working with Folder and File Properties."
View menu	Refresh Content	folder or file	Retrieves the contents of the current folder from the content repository to reflect all changes since the last retrieval. See Section 19.13, "Refreshing Folder Contents."
View menu	Hide Folders	folder or file	Refreshes the listing to show only files in the current folder, or show folders if this action is currently active. See Section 19.14, "Hiding and Showing Folders."

Table 19–1 (Cont.) Actions for Folders and Files

Location	Actions	Applicable to:	Description
View menu	Columns submenu	folder or file	Provides a submenu to select the columns that you want to display. See Section 19.3.1, "Hiding and Showing Columns."
View menu	Reorder Columns	folder or file	Opens the Reorder Columns dialog where you can organize the displayed columns into a different order. See Section 19.3.2, "Reordering Columns."
View menu	New Wiki Document	file	Opens the Rich Text Editor where you can define a new wiki document, created at the same level as the currently selected file, or in the current folder. See Section 19.5.2, "Creating a Wiki Document." Not available in the Document List Viewer.
Button on toolbar	Upload	file	Opens a panel where you can upload files from your local file system or a network drive. See Section 19.5.1, "Uploading Files." Not available in the Document List Viewer.
Button on toolbar and context menu	Download	file	Opens a dialog to save files to your local file system. See Section 19.8.3, "Downloading a File." Not available in the Document List Viewer.

19.2.2 File and Folder Actions in the Document Viewer

[Table 19–2](#) summarizes the file and folder management options in the Document Viewer or the Document Viewer preview pane or window.

The *Document Viewer preview pane or window* opens when you:

- Right-click a *folder* and choose **Details** from the folder context menu to display the details of that folder.
- Click a *file* to display a preview of file contents. This allows for file previewing and editing for some file types. If the file type does not support a preview (for example, `.mp3` music files, video files, or `.zip` files) or if you are using an Apple iOS device, the preview pane displays the file properties (see [Section 19.1.4, "About the Document Viewer"](#)) rather than a preview of the file content.

Table 19–2 Document Viewer Preview Pane Actions for Folders and Files

Location	Actions	Applicable to:	Description
File menu	Send Mail	file or folder	Opens your mail application with the body of the mail message showing the direct URL to the currently open folder or file, as well as the URL to the current portal, if applicable. See Section 19.21.2, "Mailing the URL for a Folder or File."
File menu	Subscribe	file	Activates monitoring of the activities on a file. Whenever any change is made to the file, you will be notified in your personal Activity Stream in the Home portal. See Section 19.23, "Subscribing to a File."
File menu	Share	file	Opens a dialog where you specify the users, groups, or select a portal where the URL for the selected file will be published in Activity Streams, along with a message. See Section 19.21.3, "Publishing the URL for a File to Activity Streams."
File menu	Add To Favorites	file or folder	Adds the selected folder or file to your WebCenter Portal Favorites list. See Section 19.25, "Adding a Folder or File to Your Favorites."
File menu	Check Out	file	Checks the current file out, locking it from update by other users. See Section 19.8.1, "Checking a File Out." Not available for wiki documents or blog posts.
File menu	Workflow Settings	folder	Opens the Workflow Settings dialog, where you can assign workflow to the selected folder in a portal. For more information, see the "Assigning a Workflow to a Folder in a Portal" section in <i>Building Portals with Oracle WebCenter Portal</i> . Available only when the connected content repository is Content Server and your system administrator has completed the prerequisite configuration.
File menu	Security	file or folder	Opens the Security Settings dialog, where you can set custom access permissions for the selected folder or file, or select to inherit the permissions of the parent folder. For more information, see Section 19.22, "Setting Security Options on a Folder or File." Available only if your system administrator has configured item-level security between Content Server and WebCenter Portal.

Table 19–2 (Cont.) Document Viewer Preview Pane Actions for Folders and Files

Location	Actions	Applicable to:	Description
File menu	Annotate with AutoVue	file	<p>Opens the selected file in the AutoVue file viewer on Content Server, where you can provide comments and individualized mark-up. For more information, see Section 20.3, "Collaborating on Documents Using Oracle AutoVue."</p> <p>Available only when Oracle AutoVue is installed and your system administrator has configured Oracle AutoVue functionality.</p>
View menu	Open in Browser	file	<p>Opens the current file in your default browser application. See Section 19.6.2, "Opening a File."</p> <p>Available for images, text, wiki documents, and HTML files only.</p>
View menu	Open as PDF	file	<p>Opens the current file in the Document Viewer preview pane in PDF. See Section 19.6.2, "Opening a File" and Section 19.6.3, "Opening or Saving PDF Files."</p> <p>Available for any file type for which Content Server is configured to convert to PDF.</p>
View menu	Download PDF	file	<p>Opens a browser dialog where you can choose to open the file with Adobe Acrobat Reader, or save it to your local file system as a PDF file. See Section 19.8.3, "Downloading a File" and Section 19.6.3, "Opening or Saving PDF Files."</p> <p>Available for any file type for which Content Server is configured to convert to PDF.</p>
View menu	Comments	file	<p>Opens the Comments pane for the current file in the tabbed pane area at the bottom of the Document Previewer, providing a text input area where you can enter a comment for the file. See Section 15.4, "Commenting on Items."</p>
View menu	Version History	file	<p>Opens the History pane for the currently selected file in the tabbed pane area at the bottom of the Document Previewer, showing the existing versions of the file, where you can delete selected versions. See Section 19.16, "Viewing and Deleting File Version History."</p>
View menu	Info	file	<p>Opens the Info pane for the currently selected file in the tabbed pane area at the bottom of the Document Previewer, where you can view and edit Basic and Advanced properties. See Section 19.17, "Working with Folder and File Properties."</p>

Table 19–2 (Cont.) Document Viewer Preview Pane Actions for Folders and Files

Location	Actions	Applicable to:	Description
View menu	Get a Link	file or folder	Opens the Get a Link dialog for the current folder or file, where Direct URL provides a direct link to open the folder or file in WebCenter Portal, and the Download URL provides a direct link to allow users to open the folder or file in its default application, or choose to save the file to their local file system. See Section 19.21, "Sharing the URL for a Folder or File."
View menu	Refresh Content	file or folder	Retrieves the current folder or file from the content repository to reflect all changes since the last retrieval.
Button on toolbar	Edit or Edit with <i>Application</i>	file	For a selected file, opens the file in-place and automatically checks the file out. Wiki documents and HTML files open in RTE; Office files open in their corresponding application. See Section 19.8.4, "Editing Files In-Place." Available for wiki documents, blog posts, HTML, and Microsoft Office (Word, Excel, and PowerPoint) files only.
Button on toolbar	Upload New Version	file	If you have write permissions on a selected file, opens the Upload Document pane where you can specify a new version of the file to upload to replace the existing file. See Section 19.8.5, "Uploading a New Version of an Existing File." Not available for wiki documents or blog posts.
Button on toolbar	Download	file	Opens a dialog to download the current file to your local file system. See Section 19.8.3, "Downloading a File."
Button on toolbar	Select Template	file	Opens the Select Template dialog, where you can choose a Site Studio region display template or a custom Content Presenter display template to preview how the Site Studio file will look in the selected template. Note: The Document Viewer is intended to provide only a preview of Site Studio content based on a selected template. To publish the content on a page, your application specialist can use Content Presenter.

19.3 Personalizing Your View of Documents

Document personalizations enable you to change your own view of documents by hiding or showing columns and by rearranging the list of documents according to the sort order of a particular column, as described in the following sections:

- [Section 19.3.1, "Hiding and Showing Columns"](#)
- [Section 19.3.2, "Reordering Columns"](#)
- [Section 19.3.3, "Sorting Files and Folders"](#)

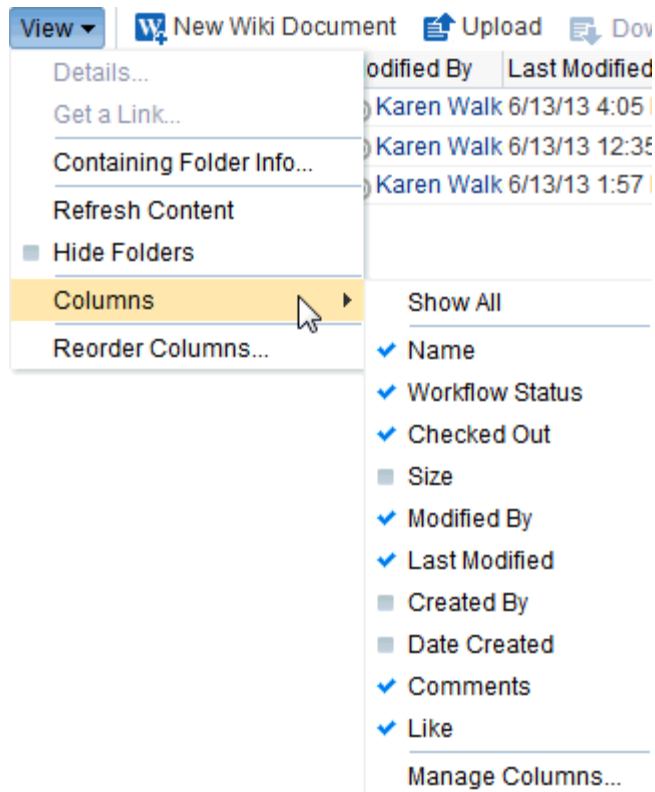
19.3.1 Hiding and Showing Columns

Hiding and showing one or more informational columns is useful for simplifying or expanding the details that are displayed with folders and files.

To hide or show informational columns in your unique view:

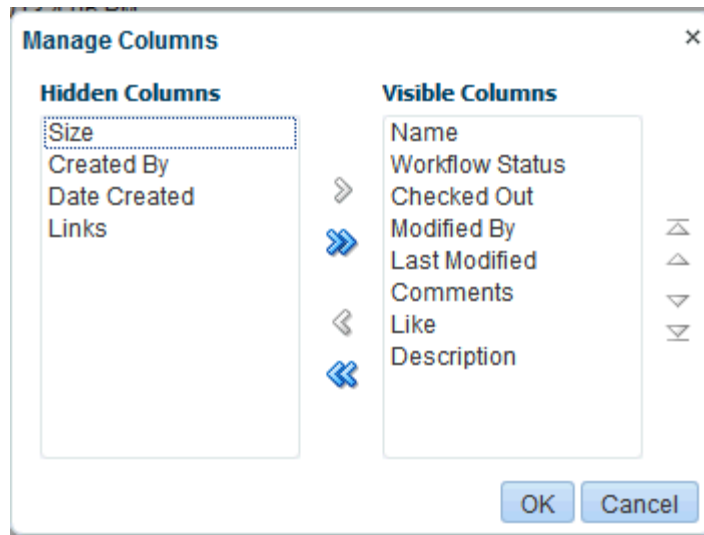
1. On the **Documents** page or in the Document Explorer, Document Manager, or Folder Viewer on a page, click the **View** menu, and select **Columns** (Figure 19–8).

Figure 19–8 Columns Menu in Document Explorer



2. Select the columns you want to show through one of the following methods:
 - Select **Show All** to display all available columns.
 - Select or deselect individual columns in the **Columns** menu to show or hide them.
 - Click **Manage Columns**, then in the Manage Columns dialog (Figure 19–9), move columns to the **Hidden Columns** or **Visible Columns** boxes as desired. Click **OK** when you are finished.

Figure 19–9 Manage Columns Dialog



If changes do not display immediately, click the **View** menu, and select **Refresh Content**.

19.3.2 Reordering Columns

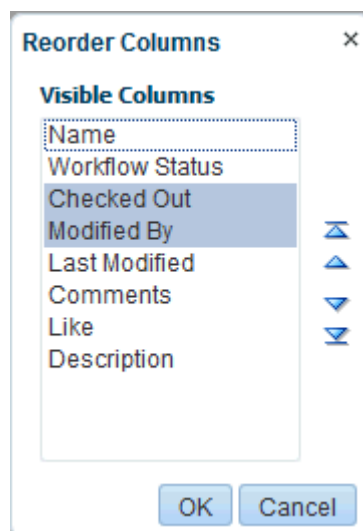
Reordering the informational columns is useful for prioritizing the details that are displayed with folders and files, depending on the information in which you are most interested.

To reorder the informational columns in your unique view:

1. On the **Documents** page or in the Document Manager, Document List Viewer, Document Explorer, or Folder Viewer, click the **View** menu, and select **Reorder Columns**.

The Reorder Columns dialog opens (Figure 19–10).

Figure 19–10 Reorder Columns Dialog



2. Select one or more columns, then click the reorder icons to rearrange the order of the columns.

19.3.3 Sorting Files and Folders

Sorting columns enables you to quickly rearrange the order of files and folders in your view. Each column provides a one-click sorting feature that you can use to instantly rearrange all content according to the ascending (1, 2, 3, A, B, C) or descending (C, B, A, 3, 2, 1) order of a particular column.

To sort folders and files in your unique view:

1. On the **Documents** page or in the Document Explorer, Document List Viewer, Document Manager, or Folder Viewer, move your cursor over the header of the column you want to use to sort folders and files.
2. Click the **Sort Ascending** icon to sort the column in ascending order (1, 2, 3, A, B, C, or smallest to largest), or click the **Sort Descending** icon to sort the column in descending order (C, B, A, 3, 2, 1, or largest to smallest) (Figure 19–11).

Figure 19–11 Sort Ascending and Sort Descending Icons



Note: The sorting icons display over the column that is the current sorting column. For other columns, the icons display when you hover your mouse pointer over the column name.

19.4 Creating a Folder

With appropriate permissions, you can create a folder in any document container (Documents viewer) that displays folders. The new folder is created at the same level as the current location. When you create a new folder, this action is not reflected in the Activity Stream.

If you create a subfolder in a parent folder that is assigned a workflow (see the "Assigning a Workflow to a Folder in a Portal" section in *Building Portals with Oracle WebCenter Portal*), the subfolder inherits the workflow assignment of the parent folder.

Note: Other methods to create and copy folders when the back-end content repository is Content Server are:

- Create a network place to a portal, then use Windows Explorer to create and copy folders, as described in [Section 21.4, "Working with Microsoft Windows Explorer Integration."](#)
 - Use the task pane available through Microsoft Office shared document management functionality to create a new folder in a portal, as described in [Section 21.3.4.2, "Adding a New Folder."](#)
-

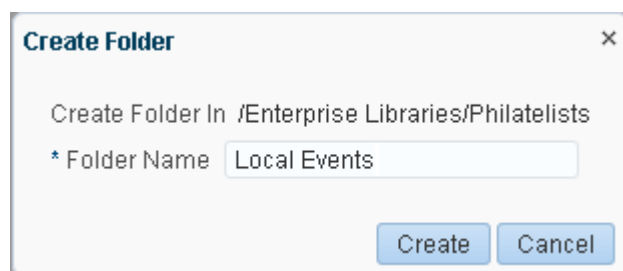
To create a folder:

1. On the **Documents** page or in the Document Explorer, Document Manager, or Folder Viewer on a page, navigate to the folder under which to create the new folder.

2. From the **File** menu, select **New Folder**.

The Create Folder dialog opens ([Figure 19–12](#)).

Figure 19–12 Create Folder Dialog



3. In the **Folder Name** field, enter a name for the folder; for example, Local Events.

Note: If WebCenter Portal is configured to use FrameworkFolders as the folder service, the following characters are not allowed in folder and file names:

? # & / \ * " | < > : ^

Letters, numbers, spaces, and periods (.) are allowed.

4. Click **Create** to create the folder and close the dialog.

19.5 Creating a File

You can create new files in the connected content repository using Documents by either uploading a file, or creating a new wiki document, as described in the following sections:

- [Section 19.5.1, "Uploading Files"](#)
- [Section 19.5.2, "Creating a Wiki Document"](#)

19.5.1 Uploading Files

Notes:

- If your system administrator has configured a maximum upload size, uploading large files (size greater than 250MB) in Microsoft Internet Explorer 9 (running with Flash) takes longer to display the upload progress percentage and to complete the upload. This is expected behavior. For more information, see the "Changing the Maximum File Upload Size" section in *Administering Oracle WebCenter Portal*.
 - WebCenter Portal does not support uploading a new wiki document or a new version of a wiki document from the file system. If you upload an HTML file, you cannot convert it to a wiki document due to differences in underlying metadata. For information about wiki documents in WebCenter Portal, see [Chapter 17, "Working with Wikis."](#)
-
-

You can upload new files from your local file system or a mapped network drive to the connected content repository, or refresh multiple existing files with new versions.

To upload a new version of a *single* existing file that already exists in the connected content repository, see [Section 19.8.5, "Uploading a New Version of an Existing File."](#)

Note: Other methods to upload files when the back-end content repository is Content Server are:

- Create a Windows network place to a portal, then use Windows Explorer to add files of any type, as described in [Section 21.4, "Working with Microsoft Windows Explorer Integration."](#) This method provides the ability to add multiple files at once to a portal, rather than uploading a maximum of 10 files at a time through the Upload Document pane, as described in this section.
 - Use the Microsoft Office shared document management functionality to save a local Microsoft Word, Excel, or PowerPoint file, or use the task pane to add files of any type to the Content Server repository, as described in [Section 21.3.4.1, "Adding a File."](#)
 - Use WebDAV, which is installed with Content Server out-of-the-box, to establish a connection to your WebCenter Portal application, then drag and drop content in your Content Server repository to the folder assigned to the target portal, or drag and drop content between portals. When dragging and dropping content to the target folder, do not drag the source folder to the target; drag and drop only the content that is stored under the folder. If you do not know the WebDAV URL for the Content Server that is used to store documents, contact your Fusion Middleware Administrator. If the base URL for that Content Server is `http://host:port/relative_web_root`, the WebDAV root URL will be `http://host:port/relative_web_root/idcplg/webdav`. For example:
`http://wchost:16200/dav/cs/idcplg/webdav/`
 - Use the Batch Loader utility, as described in the "Batch Loading Content" chapter in *Administering Oracle WebCenter Content*.
-

To upload files to the connected content repository:

1. On the **Documents** page or in the Document Explorer, Document Manager, or Folder Viewer on a page, navigate to the folder for the file(s) you plan to upload or create a new folder (see [Section 19.4, "Creating a Folder"](#)).
2. Click **Upload**.

The Upload Document pane opens ([Figure 19–13](#) shows the pane in FireFox, [Figure 19–14](#) shows the pane in Internet Explorer), providing an area where you can add the file(s) to be uploaded.

Figure 19–13 Upload Document Pane (in FireFox Browser)

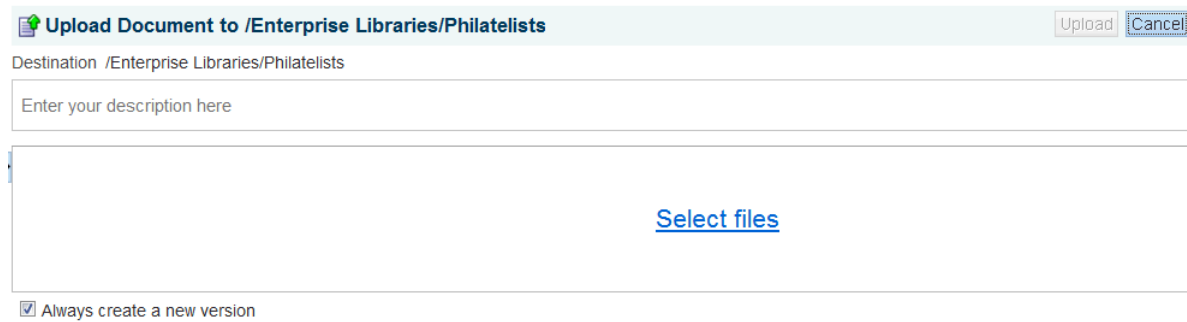
Upload Document to /Enterprise Libraries/Philatelists Upload Cancel

Destination /Enterprise Libraries/Philatelists

Enter your description here

Drop files here or [Select files](#)

Always create a new version

Figure 19–14 Upload Document Pane (in Internet Explorer Browser)

3. Follow the steps in one of the following sections:
 - [Section 19.5.1.1, "Uploading a File with a Content Profile"](#)
 - [Section 19.5.1.2, "Uploading One or More Files without a Content Profile"](#)

19.5.1.1 Uploading a File with a Content Profile

If the original version of a file is associated with a content profile in Content Server, or if you want to associate a new file with a content profile, you must first select the content profile to open the Content Check In Form, where you will upload the file *by itself*. You cannot select a profile when uploading multiple files.

Selecting a content profile enforces uniformity by requiring values for certain metadata fields that must be provided before the file can be uploaded. For example, a press release profile might include fields about who to contact, release date, and so on.

Note: To enable the **Upload Profiles** selection list, your system administrator must configure *both* of the following requirements:

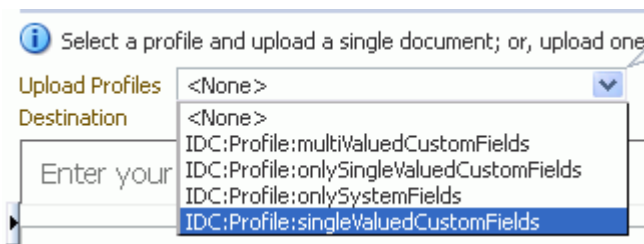
- Users must access the WebCenter Portal application through Oracle HTTP Server (OHS) to expose Content Server and the WebCenter Portal application under the same host and port. For information about setting up OHS as the front-end to WebCenter Portal, your system administrator can refer to the "Configuring Content Server" section in *Administering Oracle WebCenter Portal*.
 - WebCenter Portal must be connected to a Content Server repository, with the `webContextRoot` parameter set to `/cs`. For information on setting `webContextRoot`, your system administrator can refer to the "Registering Content Repositories for WebCenter Portal or Portal Framework Applications" section in *Administering Oracle WebCenter Portal*. For information on setting `webContextRoot` through WLST, see the "createJCRContentServerConnection" and "setJCRContentServerConnection" sections in *WebLogic Scripting Tool Command Reference*.
-

To upload a file associated with a content profile:

1. Select the profile from the **Upload Profiles** list, which displays the content profiles that have been created in Content Server ([Figure 19–15](#)).

Note: Content profiles must be created in Content Server; there are no seeded content profiles. For information about creating a content profile, your system administrator can refer to the "Creating Content Profiles in Content Server" section in *Administering Oracle WebCenter Portal*.

Figure 19–15 Selecting Content Profile for a File



The Profile Upload pane displays the Content Check In Form, with metadata fields for the selected content profile (Figure 19–16).

Figure 19–16 Content Profile Metadata Fields

2. In the **Primary File** field, specify the name of the file to be uploaded.
3. Enter values for other metadata field values to associate with the file.

Note: Content Server may require certain mandatory metadata field values for a selected content profile to ensure a successful check-in. Mandatory fields are identified in the dialog by an asterisk and red text.

For information about content profile metadata field requirements for Content Server, your system administrator can refer to the "Uploading Documents" chapter in *Using Oracle WebCenter Content*. The fields described in the "Content Check-In Form" section in the appendix are mandatory for Content Server. All content profiles must include them, otherwise the check-in will fail.

In addition to the mandatory metadata field values required by Content Server for specific content profiles, every content profile must include additional metadata fields required by WebCenter Portal. Your system administrator must add these fields to a content profile as hidden fields so that the end user cannot override the values populated by WebCenter Portal:

- `xCollectionID` - for the folder name to be persisted
- `xIdcProfile` - for the profile value to be persisted
- `dRevLabel` - required by the `CHECKIN_SEL_FORM` API to enable a new version to be checked in

This information is provided to the system administrator in "Creating Content Profiles in Content Server" section in *Administering Oracle WebCenter Portal*.

4. Click **Check In**.

The specified file is uploaded and listed in the current folder in your portal.

19.5.1.2 Uploading One or More Files without a Content Profile

To upload one or more files (maximum 10) without an associated content profile:

1. Select the file(s) to upload in either of the following ways:
 - (In FireFox or Chrome browsers only) Select the file(s) in your local file system and drag them into the Upload Document pane.
 - Click **Select files**, then navigate to and select the file(s) you want to upload.
2. In the Upload Document pane, optionally, provide a description of the file(s) in the **Description** field. This description is assigned to all the files in the upload set.
3. If the file(s) already exist in the connected content repository, select **Always create a new version** to create a new version of the file(s). Deselect the check box if you want to be notified if a file with the same name already exists in the target folder in the content repository, and be provided with options.
4. Click **Upload**.
 - If a file with the same name already exists in the target folder, and **Always create a new version** is selected, a new version of the file is added at same level as the currently selected file. See [Section 19.16, "Viewing and Deleting File Version History."](#)
 - If a file with the same name already exists in the target folder, and **Always create a new version** is selected, *but the file is checked out by another user*, an

Information dialog notifies you that the file cannot be uploaded and provides the name of the user who has it checked out.

- If a file with the same name already exists in the target folder, and **Always create a new version** is *not* selected, the Resolve Name Conflict pane opens.

Select the desired action:

- **Ignore this file** to cancel the upload operation for the current file. This is useful when uploading multiple files to skip only the current file, and continue to upload subsequent files in the batch.
- **Create a new version of the existing file** to create a new version of the file. See [Section 19.16, "Viewing and Deleting File Version History."](#)

Note: If the connected content repository does not support versioning, this selection is **Overwrite the existing file** to replace the existing file with the new file.

If the file is already checked out to another user or you do not have the permissions required to create a new version or overwrite the file, this selection is disabled.

- **Use another name for the uploaded file** to display a **Name** field where you can enter a new name for the file. If you specify a name that matches another existing file, a message notifies you to enter a different name.

19.5.2 Creating a Wiki Document

In addition to uploading files (see [Section 19.5.1, "Uploading Files"](#)) to the connected content repository, you can create wiki documents using either of the following two methods:

- **New Wiki Document** action, as described in [Section 17.2.1, "Creating a Wiki Document Using the New Wiki Document Action."](#)
- Wiki page style, as described in [Section 17.2.2, "Creating a Wiki Using the Wiki Page Style."](#)

For more information about wiki documents in WebCenter Portal, see [Chapter 17, "Working with Wikis."](#)

19.6 Opening a Folder or File

This section describes opening folders/files and downloading/saving files in the following sections:

- [Section 19.6.1, "Opening a Folder"](#)
- [Section 19.6.2, "Opening a File"](#)
- [Section 19.6.3, "Opening or Saving PDF Files"](#)

19.6.1 Opening a Folder

You can open a folder to display its contents, which does not display folders.

Note: Other methods to open folders when the back-end content repository is Content Server are:

- Create a network place to a portal, then use Windows Explorer to open folders and files, as described in [Section 21.4, "Working with Microsoft Windows Explorer Integration."](#)
 - Use the task pane available through Microsoft Office shared document management functionality to open folders in a portal, as described in [Section 21.3.4.7, "Managing Folders."](#)
-
-

To open a folder to display its contents and make it the top-level folder:

- On the **Documents** page or in the Document Explorer, Document Manager, or Folder Viewer on a page, either:
 - Click the folder name.
 - Or, right-click the folder, and choose **Open**.

19.6.2 Opening a File

With appropriate permissions, you can open files of any type to preview file contents or properties in a read-only view.

The Document Explorer, Document Manager, and Folder Viewer open files in-place in a Document Viewer preview pane; the Document List Viewer and Recent Documents open files in a separate Document Viewer preview window.

Note: Another method to open files when the back-end content repository is Content Server is:

- Create a network place to a portal, then use Windows Explorer to open folders and files, as described in [Section 21.4, "Working with Microsoft Windows Explorer Integration."](#)
-
-

To open a read-only view of a file:

- On the **Documents** page or in the Document Explorer, Document Manager, or Folder Viewer on a page, click the file name to open the file in a Document Viewer preview pane or window.

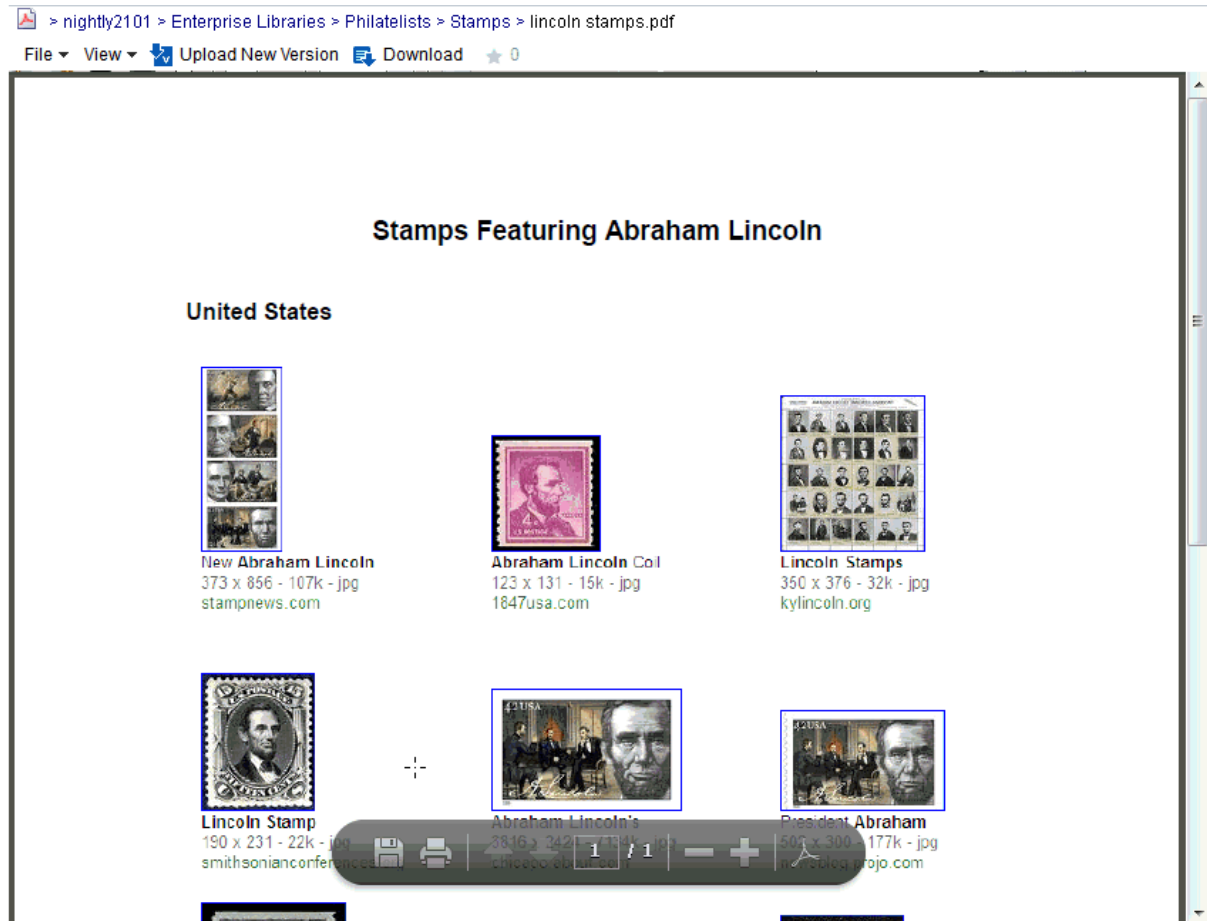
Notes:

- Some file types do not support a preview. An attempt to open such a file displays the properties of the file in the Document Viewer.
 - For files of types that support a preview, the file must also support display in an inline frame to open in the Document Previewer. For example, if an HTML file includes coding that disallows display in an inline frame, it will not display in the Document Previewer, but instead overlays the current window with the HTML file content.
-
-

The appearance of the file in the preview pane or window depends on the file type:

- **For files that support PDF format:** The file displays either in an in-place PDF viewer (Figure 19–17) or in a slide viewer (Figure 19–18).

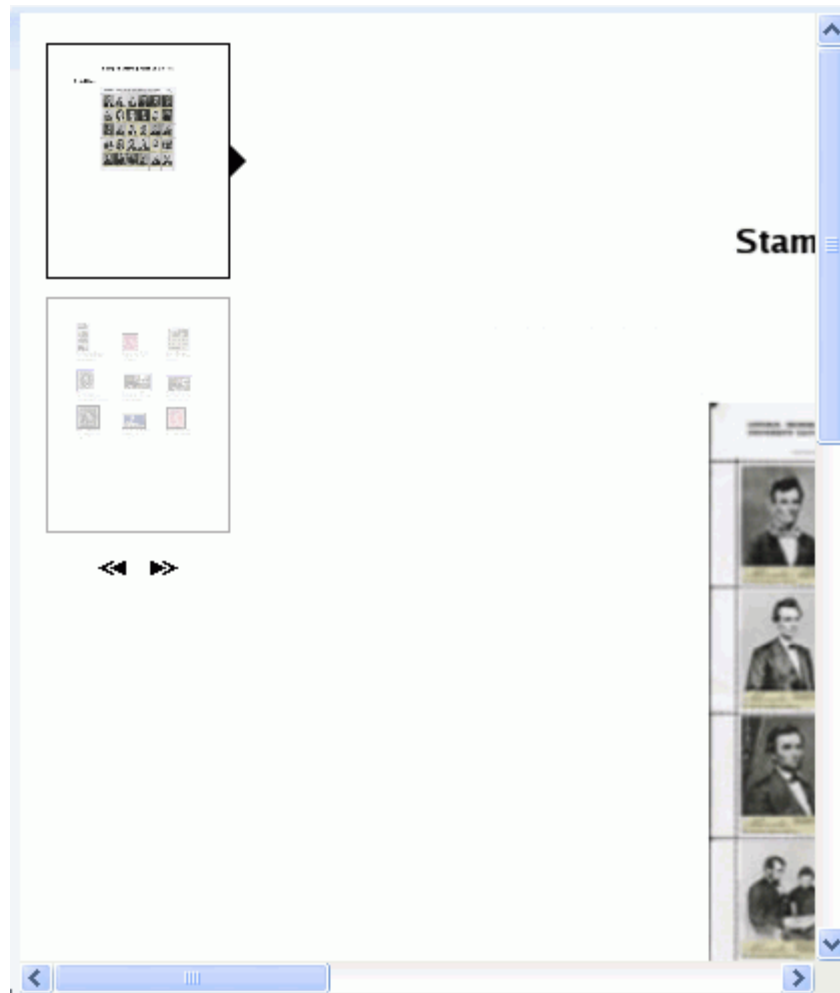
Figure 19–17 File Preview in PDF Viewer



Note: To enable the slide preview functionality, your system administrator must configure *all* of the following requirements:

- Users 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*. For information on setting `webContextRoot` through WLST, see the "createJCRContentServerConnection" and "setJCRContentServerConnection" sections in *WebLogic Scripting Tool Command Reference*.
 - Oracle WebCenter Content settings for document conversion using IBR must be configured correctly.
-
-

Figure 19–18 File Preview in Slide Viewer (see Note)



- **For HTML, text, image, XML files:** In the preview pane or window, click the **View** menu, and select **Open in Browser** to open the file in a separate tab in your browser.
- **For any file type for which Content Server is configured to convert to PDF:** In the preview pane or window, click the **View** menu, and select **Open as PDF** to open a PDF version of the file.

To edit files, see [Section 19.8, "Editing or Updating a File."](#)

19.6.3 Opening or Saving PDF Files

From the Document Viewer preview pane, you can open or save the PDF version of the currently open file to your local file system. This choice is available for any file type for which Content Server is configured to convert to PDF.

Notes:

- To enable the conversion of wikis and blogs into PDF, your system administrator must configure the WebCenter Conversion component, as described in the "Enabling the Conversion of Wikis and Blogs into PDFs" section in *Administering Oracle WebCenter Portal*.
- Only images that have been added through the Rich Text Editor (RTE) using the Embed Image feature are visible in the generated PDF. Images referenced with an external URL do not display in the PDF. For information on the RTE, see [Section 19.7, "Using the Rich Text Editor \(RTE\)."](#)

To open or save a file in PDF:

- In the Document Viewer preview pane, click the **View** menu, and select:
 - **Open as PDF** to open the file in a new tab in your browser in Adobe Acrobat Reader's PDF Viewer plug-in.
 - **Download PDF** to open a browser dialog where you can save the file to your local file system as a PDF file.

19.7 Using the Rich Text Editor (RTE)

The Rich Text Editor (RTE) is a fully-integrated HTML text editor, which you can use to create and edit wiki documents and blog posts, and edit HTML files. [Figure 19–19](#) shows create mode, and [Figure 19–20](#) shows edit mode.

Figure 19–19 *New Wiki Document in Rich Text Editor*

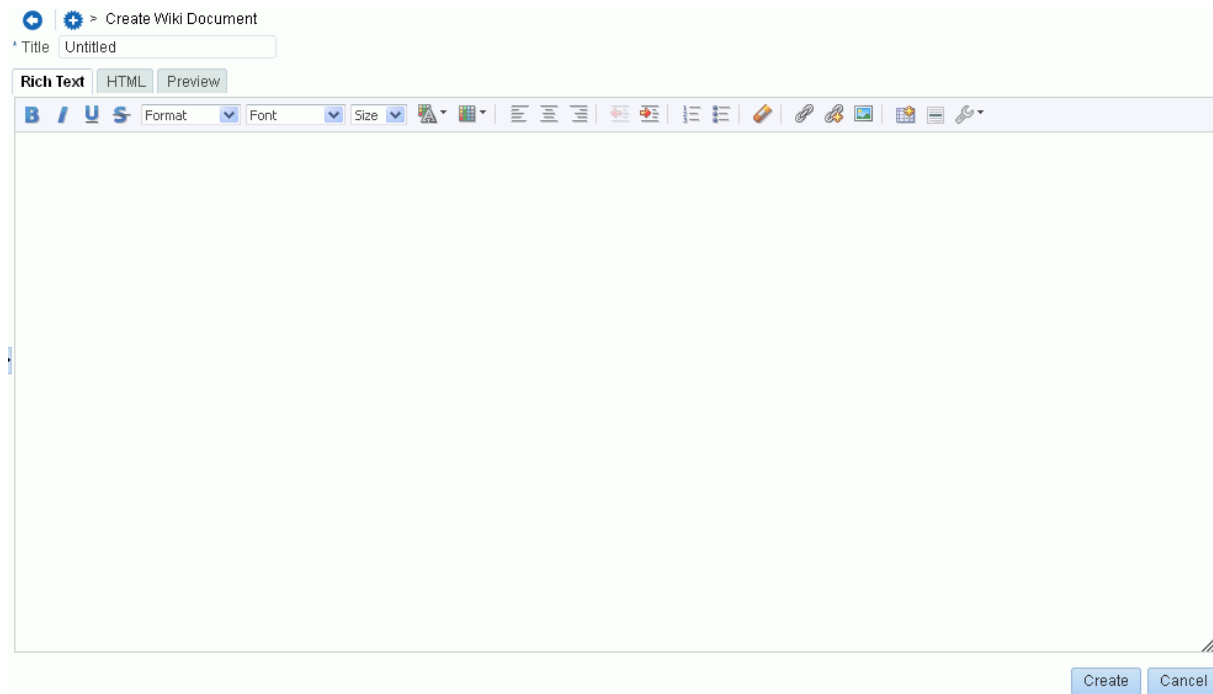


Figure 19–20 *Editing Blog Post in Rich Text Editor*

Stamper Blog

* Title

Rich Text HTML Preview

B / *I* U ~~S~~ Format

I was thinking of starting up an online Philatelists Club. If you'd be interested, please let me know what kinds of things you'd like to discuss and do as part of it.

Publish

Draft

Comments (0) Tags Links Recommendations

To use the RTE:

1. Open the RTE either by creating a new wiki document (see [Section 19.5.2, "Creating a Wiki Document"](#)) or blog post (see [Section 18.5.2, "Creating a Blog Post"](#)), or editing a wiki (see [Section 17.3, "Editing a Wiki"](#)), blog post, or HTML file (see [Section 19.8.4, "Editing Files In-Place"](#)).
2. For a new wiki document or blog post, enter a display name in the **Title** field.
3. Add, revise, and preview text, formatting, styling, and links in the **Rich Text**, **HTML**, **Wiki Markup**, and/or **Preview** tabbed panes.

Notes:

- For information about using the toolbar and features in the **Rich Text** pane, see [Section 19.7.2, "About the Rich Text Editor Toolbar,"](#) [Section 19.7.3, "Working with Tables in the Rich Text Editor,"](#) and [Section 19.7.4, "Using the Keyboard in the Rich Text Editor."](#)
 - Apple iPad users cannot make selections from drop-down lists in the RTE. This is a known limitation.
 - By default, the **Wiki Markup** tab is hidden in the RTE. Your system administrator can change this setting, as described in the "Showing and Hiding the Wiki Markup Tab in the Rich Text Editor" section in *Administering Oracle WebCenter Portal*.
 - If you switch from the **Wiki Markup** tab to another tab in the RTE, your content might become garbled. As a workaround, if you go to the **Wiki Markup** tab, click **Save and Close** or **Cancel** rather than switching to another tab in the RTE.
-
-

4. (For wiki documents and HTML files only) Select the **Minor Edit?** check box if you do not want to notify portal members about your changes.

Leaving this check box deselected updates the Activity Stream and sends notifications after you save your changes.

5. In the tabbed panes along the bottom of the RTE, you can add comments, tags, or links pertinent to the document or post. For more information, see [Section 15.4, "Commenting on Items,"](#) [Section 19.15, "Managing Tags on Files,"](#) and [Section 19.18, "Managing Document Links."](#)
6. Save your changes:
 - To create and save a new wiki document or blog post, click **Create**.
 - To save updates to an existing wiki document, blog post, or HTML file, click **Save**. To save updates and exit the RTE, click **Save and Close**.

19.7.1 About the Rich Text Editor Tabbed Panes

The RTE provides four tabbed panes where you can create and edit your wiki and HTML documents, and blog posts:

- **Rich Text.** Create and revise content in a WYSIWYG environment using the icons and controls in the RTE toolbar (see [Section 19.7.2, "About the Rich Text Editor Toolbar"](#)).

Note: Apple iPad users cannot make selections from drop-down lists in the RTE. This is a known limitation.

- **HTML.** Enter HTML manually. This includes entering source code for HTML not handled by the WYSIWYG icons and controls on the **Rich Text** tab.

If you exit the **HTML** pane, then come back to it again, any HTML that may have been entered on separate lines will reformat to display on a single line, as is customary for most HTML editors.

Notes:

- The RTE ignores the following types of tags when entered in HTML because they are irrelevant or redundant within the RTE context:
 - script tags
 - form elements, such as `input`, `select`, `textarea`, and `form`
 - `frame/frameset`
 - document tags, such as `html`, `head`, `body`, `meta`, and `title`
 - unknown tags; for example: `<foo></foo>`
- Changes to the behavior of the default CSS selectors in a wiki or blog is not supported.

- **Preview** (wiki documents and blog posts only). Shows a preview of your wiki document or post as it will appear when published.
- **Wiki Markup** (wiki documents only). If shown, use this tab to enter your own wiki markup. For the full set of wiki markup syntax, click **Wiki Markup Help** and refer to [Table 19-3](#). Any formatting not provided by Wiki Markup uses HTML.

Note:

- By default, the **Wiki Markup** tab is hidden in the RTE. Your system administrator can change this setting, as described in the "Showing and Hiding the Wiki Markup Tab in the Rich Text Editor" section in *Administering Oracle WebCenter Portal*.
- If you switch from the **Wiki Markup** tab to another tab in the RTE, your content might become garbled. As a workaround, if you go to the **Wiki Markup** tab, click **Save and Close** or **Cancel** rather than switching to another tab in the RTE.

Table 19-3 Wiki Markup Syntax and Examples

Element	Syntax	Example	Output
italics	<code>//string//</code>	<code>//Sales// team</code>	<i>Sales team</i>
bold	<code>**string**</code>	<code>**Sales** team</code>	Sales team
bulleted list	<code>* listItem</code>	<code>* Managers:</code>	<ul style="list-style-type: none"> • Managers: <ul style="list-style-type: none"> ◦ John Smith ◦ Monica Gallo • Contributors:
	<code>** subitem</code>	<code>** John Smith</code>	
	<code>** subitem</code>	<code>** Monica Gallo</code>	
	<code>* listItem</code>	<code>* Contributors:</code>	
numbered list	<code># listItem</code>	<code># Dairy</code>	<ol style="list-style-type: none"> 1. Dairy <ol style="list-style-type: none"> 1. Milk 2. Cheese 2. Bread
	<code>## subitem</code>	<code>## Milk</code>	
	<code>## subitem</code>	<code>## Cheese</code>	
	<code># listItem</code>	<code># Bread</code>	

Table 19–3 (Cont.) Wiki Markup Syntax and Examples

Element	Syntax	Example	Output						
web link	<code>[[URL linkName]]</code>	<code>[[http://www.oracle.com Search Oracle]]</code> <code>[[http://fmw.vm.oracle.com:8888/webcenter/portal/Philatelist/s/page/presidents Presidents]]</code>	Search Oracle Presidents Click link to view target in browser window						
WebCenter link	<code>[[owc://svcId/rsrcId linkName]]</code> For service ID values, ask your system administrator. To find the resource ID, view the item properties (right-click and choose Details).	<code>[[owc://oracle.webcenter.doclib/dev-ucm#dDocName:OWCSVR01USORAC026779 Results]]</code>	Results Click link to view resource in browser window						
Anchor for link target	<code><<<anchor:anchorName>>></code>	<code><<<anchor:forecast>>></code> (inserted at section describing sales forecast to act as a target for links)	(Invisible) In HTML: <code></code>						
Line break	<code>\ \</code>	<code>xxxx \ \ xxxx</code>	xxxx xxxx						
Horizontal line	<code>----</code>	<code>xxxx</code> <code>----</code> <code>xxxx</code>	xxxx _____						
Image (All browser-supported image types such as JPG, GIF, and PNG)	<code>{{URL/imageFile linkName}}</code>	<code>[[http://www.myco.com/Sales/chart.jpg Quarterly Sales]]</code>	Quarterly Sales Click link to view image in browser window						
Table	<code> =head =head ... =head </code> <code> value value ... value </code> Repeat for each row of table	<code> =ID =Name =Dept </code> <code> 1356 Bob King Sales </code>	<table border="1"> <thead> <tr> <th>ID</th> <th>Name</th> <th>Dept</th> </tr> </thead> <tbody> <tr> <td>1356</td> <td>Bob King</td> <td>Sales</td> </tr> </tbody> </table>	ID	Name	Dept	1356	Bob King	Sales
ID	Name	Dept							
1356	Bob King	Sales							

19.7.2 About the Rich Text Editor Toolbar

Table 19–4 describes the RTE toolbar icons and controls on the **Rich Text** tab, where you can create and revise content in a WYSIWYG environment.

To perform an operation assigned to an icon, click the icon once to either immediately perform the action or open a dialog with further configuration options.

Table 19–4 Rich Text Editor Toolbar Icons and Controls on Rich Text Tab


Control	Description
	Bold, Italic, Underline, and Strike Through. Select text, and click the desired font style icon; or click an icon, and enter text. Click the icon again to exit the font style.

Table 19–4 (Cont.) Rich Text Editor Toolbar Icons and Controls on Rich Text Tab

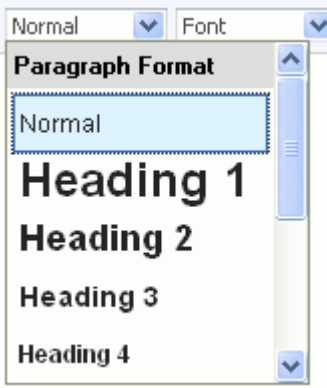

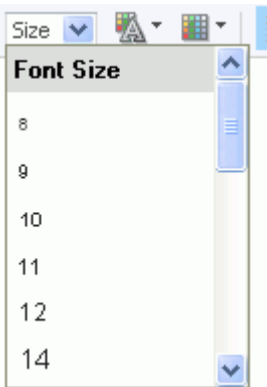
Control	Description
	<p>Paragraph Format. Select a format, then enter text; or highlight text, then select a format.</p>
	<p>Font Name. Select a font, then enter text; or highlight text, then select a font.</p>
	<p>Font Size. Select a size, then enter text; or highlight text, then select a size.</p>

Table 19–4 (Cont.) Rich Text Editor Toolbar Icons and Controls on Rich Text Tab

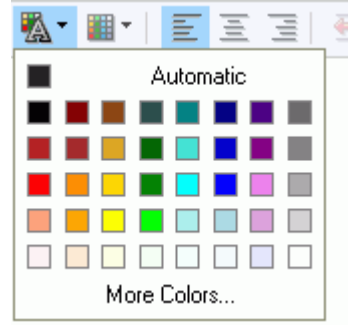




Control	Description
	<p>Text Color or Background Color. Select text, and click the desired text or background color icon, then select a color. Or, click an icon and select a color, then enter text.</p>
	<p>Left Justify, Center Justify, and Right Justify. Select text, and click to apply the desired text alignment; or click an icon, and enter text.</p>
	<p>Decrease Indent and Increase Indent. Select text, and click the desired indent icon to move text left or right.</p>
	<p>Numbered List and Bulleted List. Start a new line, click the desired list type icon, and enter text. Or, select lines of text and click an icon. Click the icon again to remove the list formatting. Alternately, end list mode by pressing Enter twice after the last item.</p>
	<p>Remove Format. Select text, and click this icon to remove all font styling, such as font types, sizes, weights, and colors. Lists and indents are not affected.</p>

Table 19–4 (Cont.) Rich Text Editor Toolbar Icons and Controls on Rich Text Tab




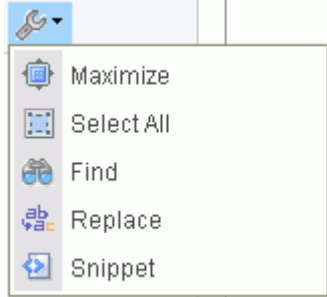
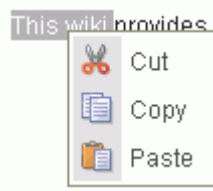
Control	Description
	<p>Select Resource. Select text to link to an existing WebCenter Portal resource, then click this icon to open the Select Resource dialog. Select a resource (for example, a document or an announcement in the current portal, or a URL) to be linked from the selected text. Clicking the linked text in the document opens the selected resource in the Document Viewer preview pane.</p> <p>New Resource. Select text to link to a new WebCenter Portal resource, then click this icon to open the New Resource dialog. Select a resource to be linked from the selected text, then create the resource (for example, a discussion forum topic or note), specify the external location of the resource (for example, a URL), specify a name for the new resource (for example, a wiki document), or upload the resource from your local file system or a connected network drive (for example, a document).</p> <p><i>Note:</i> If you create a new wiki document in this manner, WebCenter Portal creates a placeholder for the new wiki document in the current folder. To add content to the new wiki document, you must navigate to it and open it in the RTE.</p> <p>The links created using Select Resource and New Resource are created as inline links, and are not added to the Links tab associated with the details of the linking resource.</p> <p>For information about links to resources in WebCenter Portal, see Chapter 32, "Linking Information in WebCenter Portal."</p> <p>Embed Image. Click to open the Embed Image dialog:</p> <ul style="list-style-type: none"> ▪ Click Select Image to select an image in the current portal. ▪ Click Upload Image to upload an image from your local file system or a connected network drive.
	<p>Table. Click to open the Table Properties dialog.</p> <p>See Section 19.7.3, "Working with Tables in the Rich Text Editor."</p>
	<p>Insert Horizontal Line. Click to insert a horizontal line at the current cursor location.</p>
	<p>Tools:</p> <ul style="list-style-type: none"> ▪ Maximize/Minimize. Click to expand the RTE to fill the entire screen, or reduce the RTE to display inside the WebCenter Portal application. ▪ Select All. Select all content in the body in the text input area. ▪ Find or Replace. Click to open the Find and Replace dialog, where you can search for a string, or replace a given string with specified text. ▪ Snippet. In a blog post, select a portion of text, then click this icon to display that portion as a summary of the blog post on the blog summary page (or digest page), with a Read More link to allow users to view the full blog. In a wiki document, this functionality is not available.

Table 19–4 (Cont.) Rich Text Editor Toolbar Icons and Controls on Rich Text Tab

Control	Description
	<p>Cut, Copy, or Paste. Select text, then right-click to display context menu to cut or copy selected text, or paste text in the buffer at the current cursor location.</p> <p>Note: If a browser security warning displays, you can either use keyboard commands (see Section 19.7.4, "Using the Keyboard in the Rich Text Editor") or configure your browser to grant access to the clipboard. For example, for the FireFox browser, see http://kb.mozillazine.org/Granting_JavaScript_access_to_the_clipboard.</p>

19.7.3 Working with Tables in the Rich Text Editor

To create a table in the RTE, click the **Table** icon in the toolbar ([Figure 19–21](#)).

Figure 19–21 Rich Text Editor: Table Icon



The Table Properties dialog window opens ([Figure 19–22](#)), where you can set basic properties for the table, as described in [Table 19–5](#).

Figure 19–22 Rich Text Editor: Table Properties Dialog (Basic Properties)

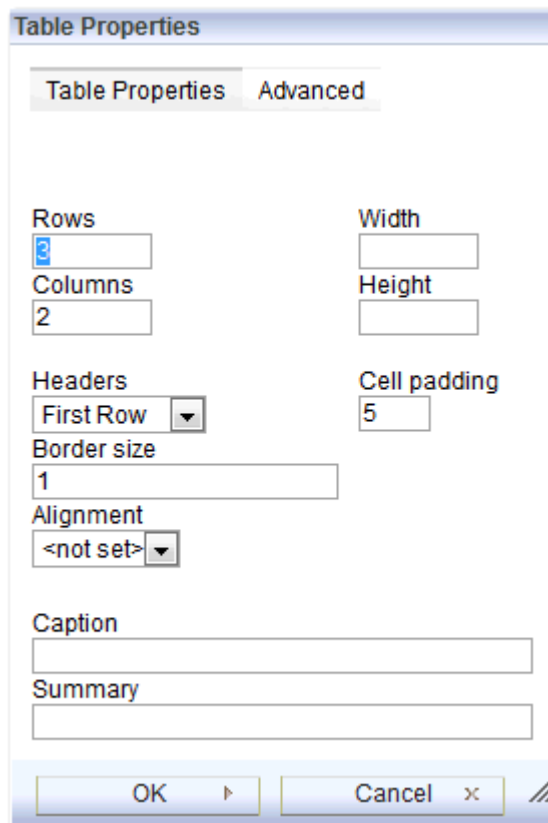
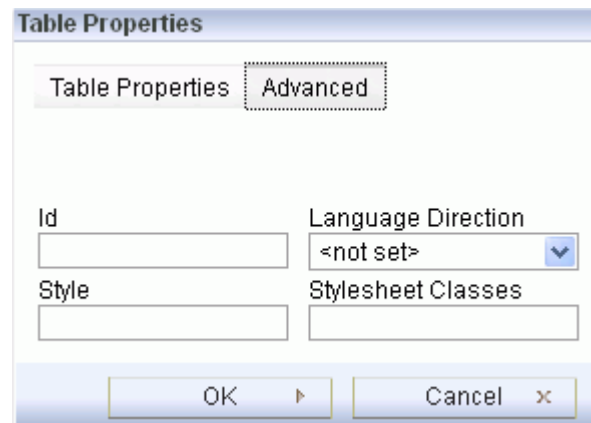


Table 19–5 Rich Text Editor: Basic Table Properties

Property	Description
Rows	(Required) Enter the number of rows in the table.
Columns	(Required) Enter the number of columns in the table.
Width	Enter the width of the table, selecting either pixels or a percent value. Giving the width as a percent value lets you set the proportion of the editing area that the table will occupy.
Height	Enter the height of the table in pixels.
Headers	Select the table element to format as headers, which applies special formatting to them. You can apply header formatting to First Row, First Column or Both.
Border Size	Enter the width of the table borders.
Alignment	Select the alignment of the table on the page Left, Center, or Right.
Cell padding	Enter the space between the cell border and its contents, in pixels.
Caption	Enter label text to be displayed above the table.
Summary	Enter a summary of the table contents that is available for assistive devices like screen readers. It is good practice to provide tables with meaningful summary text to make them more accessible to users with disabilities.

Click the **Advanced** tab to expose the advanced table properties (Figure 19–23), which you can set as described in Table 19–6.

Figure 19–23 Rich Text Editor: Table Properties Dialog (Advanced Properties)**Table 19–6 Rich Text Editor: Advanced Table Properties**

Property	Description
Id	Enter a unique identifier for a table element in the document (<code>id</code> attribute).
Language Direction	Select the direction of the text in the table: left to right (LTR) or right to left (RTL) (<code>dir</code> attribute).
Style	Enter the CSS style definitions (<code>style</code> attribute). Note that each value must end with a semi-colon and individual properties should be separated with spaces.

Table 19–6 (Cont.) Rich Text Editor: Advanced Table Properties

Property	Description
Stylesheet Classes	Enter the class of the table element (<code>class</code> attribute). If a table element is assigned more than one class, separate class names with spaces.

With a table inserted into your document, you can enter values directly in the cells. Additional editing is available through the context menu. To open the context menu, right-click the table and choose actions as described in [Table 19–7](#).

Table 19–7 Rich Text Editor: Table Context Menu Selections

Action	Description
Paste	Pastes the content on the clipboard at the current cursor location
Cell	See Section 19.7.3.1, "Editing Table Cells in the Rich Text Editor."
Row	See Section 19.7.3.2, "Editing Table Rows in the Rich Text Editor."
Column	See Section 19.7.3.3, "Editing Table Columns in the Rich Text Editor."
Delete Table	Deletes the entire table and its contents.
Table Properties	Opens the Table Properties dialog, where you can modify properties as described in Table 19–5, "Rich Text Editor: Basic Table Properties" and Table 19–6, "Rich Text Editor: Advanced Table Properties" , with the exception of the number of rows and columns.

19.7.3.1 Editing Table Cells in the Rich Text Editor

To insert, delete, merge, or cells, or modify cell properties, right-click a cell (*the current cell*) to display the context menu, then choose **Cell** to expand the submenu of cell actions ([Figure 19–24](#)), and choose actions as described in [Table 19–8](#).

To select multiple cells, drag the mouse over the cell, then right-click to open the context menu.

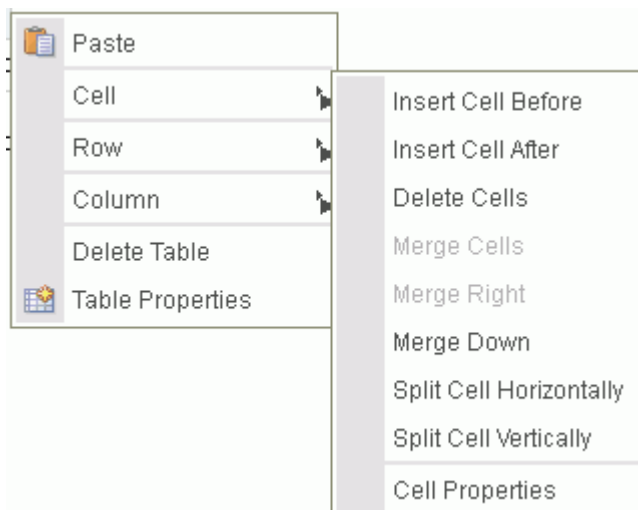
Figure 19–24 Rich Text Editor: Table Cell Actions

Table 19–8 Rich Text Editor: Table Cell Menu Selections

Action	Description
Insert Cell Before	Inserts a new cell before the current cell(s).
Insert Cell After	Inserts a new cell after the current cell(s).
Delete Cells	Deletes the current cell(s).
Merge Cells	Merges multiple selected cells into one. This option is available only if two or more cells are selected.
Merge Right	Merges the selected cell with a cell on its right. This option is available only if no more than one cell is selected.
Merge Down	Merges the selected cell with a cell located below it. This option is available only if no more than one cell is selected.
Split Cell Horizontally	Splits the selected cell in two, creating a new cell on its right. The content of the cell appears in the original, left cell. This option is available only if no more than one cell is selected.
Split Cell Vertically	Splits the selected cell in two, creating a new cell below it. The content of the cell appears in the original, upper cell. This option is available only if no more than one cell is selected.
Cell Properties	Opens the Cell Properties dialog, where you can configure cell size, type, color, and content alignment, as described in Section 19.7.3.1.1, "Editing Table Cell Properties in the Rich Text Editor."

19.7.3.1.1 Editing Table Cell Properties in the Rich Text Editor

Table cells can be further customized, creating a unique look and feel. From the table context menu, select **Cell**, then **Cell Properties** to open the Cell Properties dialog (Figure 19–25) where you can set cell properties for the table, as described in Table 19–9.

Figure 19–25 Rich Text Editor: Table Cell Properties Dialog

The screenshot shows the 'Cell Properties' dialog box with the following fields and controls:

- Width:** Input field with a 'pixels' dropdown menu.
- Height:** Input field with a 'pixels' label.
- Word Wrap:** Dropdown menu set to 'Yes'.
- Horizontal Alignment:** Dropdown menu set to '<not set>'.
- Vertical Alignment:** Dropdown menu set to '<not set>'.
- Cell Type:** Dropdown menu set to 'Data'.
- Rows Span:** Input field.
- Columns Span:** Input field.
- Background Color:** Input field with a 'Choose' button.
- Border Color:** Input field with a 'Choose' button.
- Buttons:** 'OK' and 'Cancel' buttons at the bottom.

Table 19–9 Rich Text Editor: Table Cell Properties

Action	Description
Width	Enter the width of the cell, selecting either pixels or a percent value. Giving the width as a percent value lets you set the proportion of the row that the cell (and the column it is located in) will occupy.
Height	Enter the height of the cell in pixels.
Cell Type	Select the type of the table cell — either a normal data cell or a header cell with special formatting.
Word Wrap	Select whether or not to wrap content in the current cell.
Rows Span	Enter a numeric value to specify the number of rows over which to stretch the cell downward. This value sets the <code>rowspan</code> attribute.
Columns Span	Enter a numeric value to specify the number of columns over which to stretch the cell to the right. This value sets the <code>colspan</code> attribute.
Horizontal Alignment	Select the horizontal alignment of table cell contents: Left, Center, or Right.
Vertical Alignment	Select the vertical alignment of table cell contents: Top, Middle, Bottom, or Baseline.
Background Color Border Color	Enter the color of the cell background and/or border using any of the following methods: <ul style="list-style-type: none"> ■ Enter an RGB value in <code>rgb(nn, nn, nn)</code> format, where <code>nn</code> is a numeric value on a scale from 0 to 255 representing the red, green, and blue channel. ■ Enter a hexadecimal RGB value, in <code>#nnnnnn</code> format, where the <code>nnnnnn</code> is the three pairs of hex color values representing the red, green, and blue channel. ■ Click Choose to open the Select color dialog where you can select from the color palette.

19.7.3.2 Editing Table Rows in the Rich Text Editor

To insert or delete rows in a table, right-click a row (*the current row*) to display the context menu, then choose **Row** to expand the submenu of row actions (Figure 19–26), and choose actions as described in Table 19–10.

To select multiple rows, drag the mouse over the rows, then right-click to open the context menu.

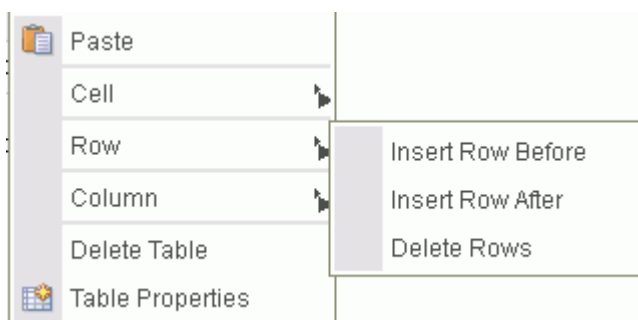
Figure 19–26 Rich Text Editor: Table Row Actions

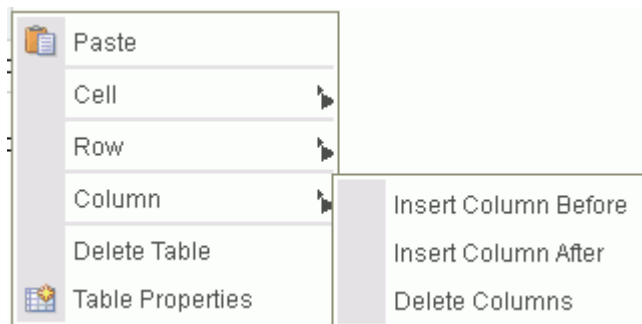
Table 19–10 Rich Text Editor: Table Row Menu Selections

Action	Description
Insert Row Before	Inserts a new row before the current row(s).
Insert Row After	Inserts a new row after the current row(s).
Delete Rows	Deletes the current row(s).

19.7.3.3 Editing Table Columns in the Rich Text Editor

To insert or delete columns in a table, right-click a column (*the current column*) to display the context menu, then choose **Column** to expand the submenu of column actions (Figure 19–27), and choose actions as described in Table 19–11.

To select multiple columns, drag the mouse over the columns, then right-click to open the context menu.

Figure 19–27 Rich Text Editor: Table Column Actions**Table 19–11 Rich Text Editor: Table Column Menu Selections**

Action	Description
Insert Column Before	Inserts a new column before the current column(s).
Insert Column After	Inserts a new column after the current column(s).
Delete Columns	Deletes the current column(s).

19.7.4 Using the Keyboard in the Rich Text Editor

The Rich Text Editor is compliant with several accessibility standards, including the Web Content Accessibility Guidelines (WCAG), the US Section 508 Amendment to the Rehabilitation Act of 1973 and the IBM Web Accessibility Checklist. To this end, you can use the RTE with the keyboard as well as a screen reader. The currently supported screen reader solution is JAWS.

For more information about accessibility in WebCenter Portal, see [Section 5.4, "Setting Your Accessibility Options."](#)

Table 19–12 summarizes the keyboard keys and combinations available to you to navigate and edit text in the RTE.

Table 19–12 Rich Text Editor: Keyboard

Keyboard Keys	Description
Alt+F10	Moves to the toolbar.

Table 19–12 (Cont.) Rich Text Editor: Keyboard

Keyboard Keys	Description
Tab	In the toolbar, moves to the next button group. In a dialog, moves to the next element.
Shift+Tab	In the toolbar, moves to the previous button group. In a dialog, moves to the previous element.
Left Arrow/Right Arrow	In the toolbar, moves between buttons within a button group. In a dialog, moves within a field.
Enter	In the toolbar, selects the current button or menu item, or expands a drop-down list or menu. In a dialog, confirms entry at current cursor location).
Down Arrow/ Up Arrow	Moves between selections in a drop-down list.
Esc	Closes a menu without executing any command. When inside a submenu, closes the submenu and returns focus to the parent context menu. Press Esc again to close it. In a dialog, cancels entries and closes dialog (equivalent to clicking Cancel or Close).
<i>In the editing area:</i>	
Shift+F10	Opens the context menu of the current element (use down arrow and up arrow to move between selections in the menu, and Enter to select an action).
Alt+F10	Moves to the tab selection in a dialog (use left and right arrow keys to move between tabs, and Enter to move to the fields on a tab).
Ctrl+A	Selects the entire content in the editing area.
Ctrl+B	Changes the formatting of the selected text to bold or remove the bold formatting of the selected text.
Ctrl+C	Copies highlighted selections to the clipboard.
Ctrl+I	Changes the formatting of the selected text to italics or remove the italics from the selected text.
Ctrl+U	Underlines the selected text or remove the underline formatting of the selected text.
Ctrl+V or Shift+Insert	Pastes the content on the clipboard at the current cursor location.
Ctrl+X or Shift+Delete	Cuts highlighted selections to the clipboard.
Ctrl+Y	Performs the redo operation.
Ctrl+Z	Performs the undo operation.

19.8 Editing or Updating a File

You can check a file out, download it to your local file system for editing, edit a file in-place, or upload a new version of an existing file. The actions available to you depend on the file type:

- For all file types except wiki documents and blog posts, check the file out to lock it from being updated by other users.
- For all file types, download the file to your local file system for saving or editing locally.

- For wiki documents, blog posts, and HTML documents, edit the file in-place using the Rich Text Editor (RTE).
- For all file types except wiki documents and blog posts, upload a new version of the file.

The following sections provide more information:

- [Section 19.8.1, "Checking a File Out"](#)
- [Section 19.8.2, "Cancelling a Checked Out Status"](#)
- [Section 19.8.3, "Downloading a File"](#)
- [Section 19.8.4, "Editing Files In-Place"](#)
- [Section 19.8.5, "Uploading a New Version of an Existing File"](#)

19.8.1 Checking a File Out

When you want to retain exclusive use of a file—for example, when you are editing it on your local machine, or need to prevent other users from modifying it—you must check the file out. Other WebCenter Portal users can view the file, but they cannot upload a file of the same name into the same folder while the file is checked out.

Note: When you edit a file in-place (see [Section 19.8.4, "Editing Files In-Place"](#)), it is automatically checked out of the content repository. When you save it, it is automatically checked back in.

When you are ready to release the file, you can either check the file back in, or cancel file check out. Checking a file back in involves uploading the revised file (see [Section 19.8.5, "Uploading a New Version of an Existing File"](#)). Cancelling check out removes the file's checked out status without requiring a file upload (see [Section 19.8.2, "Cancelling a Checked Out Status"](#)).

Note: To use the task pane available through the Microsoft Office shared document management functionality to check a Microsoft Word, Excel, or PowerPoint file out or in when the back-end content repository is Content Server, see [Section 21.3.4.3, "Checking a File Out"](#) and [Section 21.3.4.4, "Checking a File In."](#)

To check a file out:

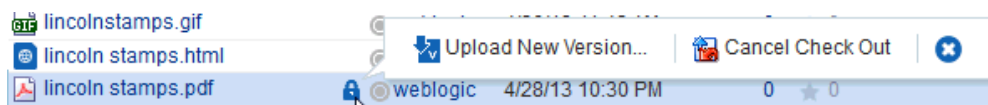
1. On the **Documents** page or in the Document Explorer, Document Manager, or Folder Viewer on a page, click in the row of the file you want to check out.

Alternatively, you can check out an open file in the Document Viewer preview pane.

Notes:

- File check out is not available for wiki documents. In-place editing is the optimal way to update wiki documents, as described in [Section 19.8.4, "Editing Files In-Place."](#)
- To check out 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. See the "Understanding Workflow Types" section in *Building Portals with Oracle WebCenter Portal*.

2. Depending on your view, perform one of the following actions:
 - On the **Documents** page or in the Document Explorer, Document Manager, or Folder Viewer on a page, click the **File** menu, and select **Check Out**, or right-click to display the file's context menu and choose **Check Out**.
 - In the Document Viewer preview pane, click the **File** menu, and select **Check Out**.
3. On the **Documents** page or in the Document Explorer, Document Manager, or Folder Viewer on a page, click the **View** menu, and select **Refresh Content** to confirm that the **Checked Out** (padlock) icon appears in the file's **Checked Out** column:
 - Roll your mouse pointer over the icon to see details about the user who has the file checked out.
 - Click the icon to expose actions to upload a new version of the file, or cancel the checkout ([Figure 19–28](#)).

Figure 19–28 Checked Out Icon with Details

19.8.2 Cancelling a Checked Out Status

To cancel the checked out status of a file:

1. On the **Documents** page or in the Document Explorer, Document Manager, or Folder Viewer on a page, click in the row of the file.
Alternatively, you can cancel the checked out status of an open file in the Document Viewer preview pane.
2. Depending on your view, perform one of the following actions:
 - On the **Documents** page or in the Document Explorer, Document Manager, or Folder Viewer on a page, click the **Checked Out** (padlock) icon in the file's row and choose **Cancel Check Out** ([Figure 19–28](#)), click the **File** menu, and select **Cancel Check Out**, or right-click to display the file's context menu and choose **Cancel Check Out**.
 - In the Document Viewer preview pane, click the **Cancel Check Out** action.
3. On the **Documents** page or in the Document Explorer, Document Manager, or Folder Viewer on a page, click the **View** menu, and select **Refresh Content** to

confirm that the **Checked Out** (padlock) icon no longer appears in the file's **Checked Out** column.

19.8.3 Downloading a File

When you want to save a file to your local file system, you can download it from the content repository.

To download a file:

1. On the **Documents** page or in the Document Explorer, Document Manager, or Folder Viewer on a page, click in the row of the file you want to download to your local file system.

Alternatively, you can download an open file in the Document Viewer preview pane.

2. Depending on your view and the file type, perform one of the following actions:
 - On the **Documents** page or in the Document Explorer, Document Manager, or Folder Viewer on a page, click the **Download** action, or right-click to display the file's context menu and choose **Download**.
 - In the Document Viewer preview pane, click the **Download** action.
 - (For any file type for which Content Server is configured to convert to PDF) In the Document Viewer preview pane, click the **View** menu, and select **Download PDF** to save a PDF version of the open file to your local file system.
3. In the Open/Save dialog, select **Save File** to open the Save dialog, where you can navigate to the folder in which to save the file.

19.8.4 Editing Files In-Place

With appropriate permissions, end users can directly edit the following types of files in-place:

- Wiki documents
- Blog posts
- HTML files
- Microsoft Office 2003 or higher files (Word, Excel, PowerPoint)

Note: If you are using Windows 7 or a 64-bit machine with Firefox 3.6 or above, you may need to install the Java plug-in available at <http://support.mozilla.com> to edit a Microsoft Office file. This plug-in is included in Java 6 Update 15 and above.

In-place editing refers to editing content directly in WebCenter Portal, where the editor opens in the document preview pane. When you edit a file in-place, it is automatically checked out of the content repository. When you save it, it is automatically checked back in.

To edit HTML and Site Studio files that display in Content Presenter, see the "Creating and Editing Files In-Context in a Content Presenter Task Flow" section in *Building Portals with Oracle WebCenter Portal*.

To edit a file in-place:

1. On the **Documents** page or in the Document Explorer, Document Manager, or Folder Viewer on a page, click in the row of the file you want to edit, but not on the file name.

Alternatively, you can edit an open file in the Document Viewer preview pane.

2. Depending on your view and the file type, perform one of the following actions:
 - On the **Documents** page or in the Document Explorer, Document Manager, or Folder Viewer on a page, click the **File** menu, and select **Edit** or **Edit with Application**, or right-click to display the file's context menu and choose **Edit** or **Edit with Application**.
 - In the Document Viewer preview pane, click the **Edit** (Figure 19–29) or **Edit with Application** (Figure 19–30) action.

Figure 19–29 Edit Action in Document Viewer for Wiki Document

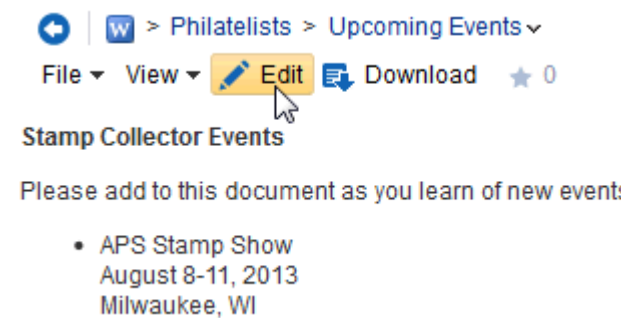
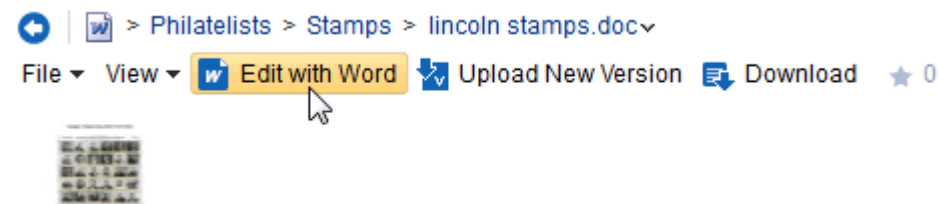


Figure 19–30 Edit Action in Document Viewer for Microsoft Word File



Notes:

- If the file is already checked out by another user, the Document Viewer specifies the name of the user who has it checked out. See [Section 19.8.4.1, "Opening a File Already Checked Out By Another User."](#)
 - 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. See the "Understanding Workflow Types" section in *Building Portals with Oracle WebCenter Portal*.
-
-

The file opens in the appropriate editor:

- Wiki documents, blog posts, and HTML files open in-place in the Rich Text Editor (RTE). For information about the RTE, see [Section 19.7, "Using the Rich Text Editor \(RTE\)."](#)

- Microsoft Office (Word, Excel, PowerPoint) files may first display a confirmation prompt, then an authentication dialog. Use the same credentials used to log in to WebCenter Portal to open the file in-place in its corresponding application.








Note: The user name and password must contain only ASCII characters. A user name or password containing multi-byte characters cannot be successfully authenticated.

When the connected content repository is Content Server, you must access the WebCenter Portal through Oracle HTTP Server (OHS) to expose Content Server and the WebCenter Portal application under the same host and port to allow for full integration of Microsoft Office with WebCenter Portal. For information about setting up OHS as the front-end to WebCenter Portal, see the "Configuring Content Server" section in *Administering Oracle WebCenter Portal*.

Additionally, your system administrator must modify system properties and server configuration files, and set up a virtual host for your WebCenter Portal. These configuration requirements are described in the "Managing Microsoft Office Integration" chapter in *Administering Oracle WebCenter Portal*.

- When the file opens, it is automatically checked out. In WebCenter Portal, click the **Refresh** icon to show the **Checked Out** icon for the selected file (Figure 19–31).

Figure 19–31 Checked Out Icon in WebCenter Portal

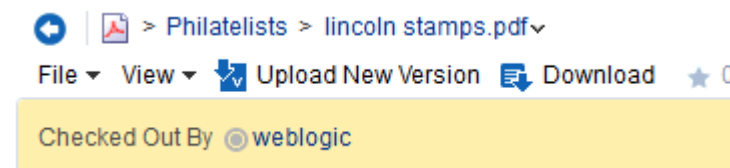
 lincoln_stamps.html	 weblogic	4/26/13 12:12 PM	0	★ 0
 lincoln_stamps.pdf	  weblogic	4/28/13 10:30 PM	0	★ 0
 lincolnstampssheet.jpg	 weblogic	4/26/13 11:42 AM	0	★ 0

- Make required updates, then save and close the file.
The modified file is automatically checked back in.

19.8.4.1 Opening a File Already Checked Out By Another User

If the file that you attempt to open is already checked out by another user, the Document Viewer specifies the name of the user who has it checked out. (Figure 19–32).

Figure 19–32 Document Viewer: File Checkout Out



You can download the file to your local system to edit it, but you cannot upload the changed file to the content repository until it is checked in and made available again.

19.8.5 Uploading a New Version of an Existing File

If you have write permissions on a file, you can replace the file with a new version that you have saved on your local file system.

To upload new versions of multiple files at once, which allows you to also specify whether to create new versions of existing files or overwrite existing files, follow the steps in [Section 19.5.1, "Uploading Files."](#)

Note: WebCenter Portal does not support uploading a new wiki document or a new version of a wiki document from the file system. If you upload an HTML file, you cannot convert it to a wiki document due to differences in underlying metadata. For information about wiki documents in WebCenter Portal, see [Chapter 17, "Working with Wikis."](#)

To upload a new version of a single file:

1. On the **Documents** page or in the Document Explorer, Document Manager, or Folder Viewer on a page, click in the row of the file you want to replace.

Alternatively, you can upload a new version of an open file in the Document Viewer preview pane.

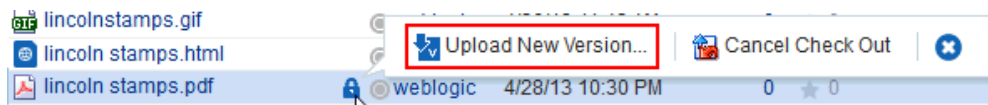
2. Depending on your view and permissions, perform one of the following actions:

Note: If you do not have write permission on the file, or if the file is already checked out by another user, then the **Upload New Version** action will not be available to you.

If you have write permissions on the file, and try to upload a new version at the same time it is being checked out by another user, an Information dialog notifies you that the file is checked out.

- On the **Documents** page or in the Document Explorer, Document Manager, or Folder Viewer on a page, click the **Checked Out** (padlock) icon in the file's row and choose **Upload New Version** ([Figure 19-33](#)), click the **File** menu, and select **Upload New Version**, or right-click to display the file's context menu and choose **Upload New Version**.

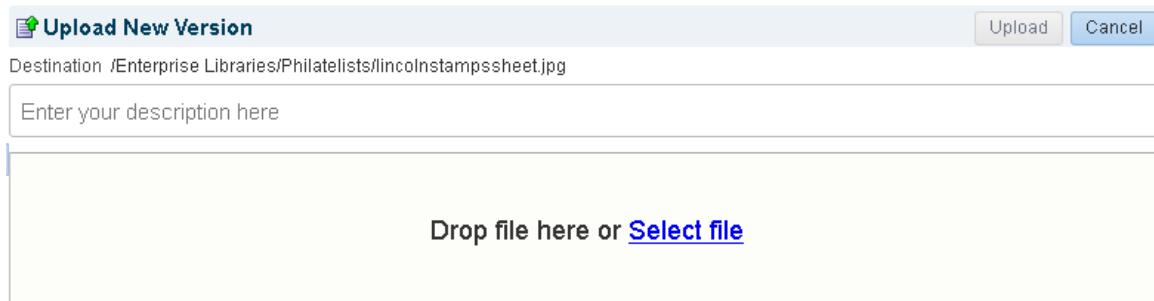
Figure 19-33 *Checked Out Icon: Upload New Version*



- In the Document Viewer preview pane, click the **Upload New Version** action ([Figure 19-34](#)).

Figure 19–34 Document Viewer: Upload New Version

The Upload New Version pane opens (Figure 19–35).

Figure 19–35 Upload New Version Pane

Note: If a file is associated with a content type profile, it will be uploaded using that content type profile. You cannot change a file's content type profile by uploading a new version. See [Section 19.5.1.1, "Uploading a File with a Content Profile"](#) for information about selecting a content type profile when a file is first uploaded.

3. Select the file(s) to upload in either of the following ways:
 - (In FireFox or Chrome browsers only) Select the file(s) in your local file system and drag them into the Upload New Version pane.
 - Click **Select file**, then navigate to and select the file(s) you want to upload.
4. In the Upload Document pane, optionally, provide a description of the file in the **Description** field.
5. Click **Upload**.

A new version of the file replaces the existing file. For information about viewing versions of a file, see [Section 19.16, "Viewing and Deleting File Version History."](#)

19.9 Renaming a Folder or File

You can rename a folder or file as described in the following sections:

- [Section 19.9.1, "Renaming a Folder or File Using a Menu"](#)
- [Section 19.9.2, "Renaming a File and Revising Its Description Through Properties"](#)

Note: To use Windows Explorer to rename folders and files in a portal when the back-end content repository is Content Server, see [Section 21.4.2, "Working with Files Using Windows Explorer."](#)

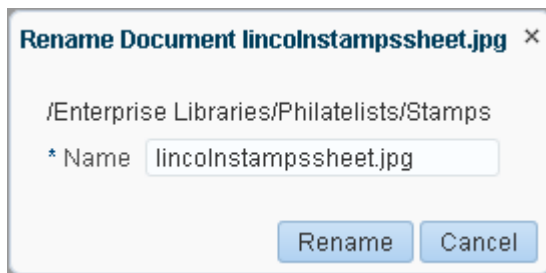
19.9.1 Renaming a Folder or File Using a Menu

To rename a folder or file:

1. On the **Documents** page or in the Document Explorer, Document Manager, or Folder Viewer on a page, click in the row of the folder or file you want to rename.
2. Click the **File** menu, and select **Rename**, or right-click in the folder or file's row to display the context menu and choose **Rename**.

The Rename Folder or Rename Document dialog opens ([Figure 19–36](#)).

Figure 19–36 *Rename Document Dialog*



3. In the **Name** field, enter a new folder or file name.

Note: If WebCenter Portal is configured to use FrameworkFolders as the folder service, the following characters are not allowed in folder and file names:

? # & / \ * " | < > : ^

Letters, numbers, spaces, and periods (.) are allowed.

4. Click **Rename**.

19.9.2 Renaming a File and Revising Its Description Through Properties

To rename a file or revise its description through its properties, see [Section 19.17.2, "Working with File Properties."](#)

19.10 Copying and Pasting Folders and Files

You can copy and paste folders and files in the following ways:

- Use menu actions as described in the steps below.
- Drag and drop into a target folder while pressing the Ctrl key. You can even drag and drop into another Documents viewer on the same page as long as both viewers are connected to the same content repository.

- Copy a file to your local file system, as described in [Section 19.8.3, "Downloading a File."](#)

Notes:

- When you copy a file, only the latest version of the file is copied, not the version history. For more information on file history, see [Section 19.16, "Viewing and Deleting File Version History."](#)
 - Duplicate copies of files and folders (prefixed with "Copy of") are created when you "copy and paste", "cut and paste", or "move and paste" to a location that already contains a file or folder with the same name. For example, if you copy or cut the file `Events.docx` and paste it to a folder containing that file, the new pasted version is named `Copy of Events.docx`. This happens when **Oracle WebCenter Portal** is configured to use **Framework Folders** as the folder service. If `Folders_g` is configured, files and folders are not duplicated if a matching copy is found at the target.
-
-

To copy one or more folders (including all of its subfolders and files) or files using menu actions:

1. On the **Documents** page or in the Document Explorer, Document Manager, or Folder Viewer on a page, click in the row of the folder(s) or file(s) you want to copy.

To select multiple folders or files, Ctrl-click in the rows.

2. Click the **File** menu, and select **Copy**, or right-click to display the context menu and choose **Copy**.
3. Navigate to the folder where you want to paste the copied folder(s) or file(s).

You can also navigate to a folder in another Documents viewer on the same or a different page as long as both viewers are connected to the same content repository.

4. Click the **File** menu, and select **Paste**, or right-click to display the folder's context menu and choose **Paste**. After pasting, the **Paste** action becomes inactive in the current folder. You can continue to paste the copied content to other folders as needed.

If you are copying into another Documents viewer, you may need to refresh the target folder if the **Paste** menu action is not active (see [Section 19.13, "Refreshing Folder Contents"](#)).

The selected folder(s) and file(s) are copied to the current folder.

Note: If a folder or file is deleted at the source location before pasting, it will not be copied to the paste location.

19.11 Moving Folders and Files

You can move folders and files in the following ways:

- Use the menu actions as described in the steps below.

- Drag and drop into a target folder. You can even drag and drop into another Documents viewer on the same page as long as both viewers are connected to the same content repository.

Note: To use Windows Explorer to move folders and files in a portal when the back-end content repository is Content Server, see [Section 21.4.2, "Working with Files Using Windows Explorer."](#)

To move one or more folders (including all of its subfolders and files) or files using menu actions:

1. On the **Documents** page or in the Document Explorer, Document Manager, or Folder Viewer on a page, click in the row of the folder(s) or file(s) you want to move.
To select multiple folders or files, Ctrl-click in the rows.
2. Click the **File** menu, and select **Cut**, or right-click to display the context menu and choose **Cut**.
3. Navigate to the folder where you want to move the folder(s) or file(s).

You can also navigate to a folder in another Documents viewer on the same or a different page as long as both viewers are connected to the same content repository

4. Click the **File** menu, and select **Paste**, or right-click to display the folder's context menu and choose **Paste**. After pasting, the **Paste** action becomes inactive in the current folder.

If you are moving folders or files into another Documents viewer, you may need to refresh the target folder if the **Paste** menu action is not active (see [Section 19.13, "Refreshing Folder Contents"](#)).

The selected folder(s) and file(s) are moved to the current folder.

Notes:

- If you do not paste the cut folder(s) or file(s), they are restored to the location where they were cut. If a folder or file is deleted at the source location before pasting, it will not be moved to the paste location.
 - Duplicate copies of files and folders (prefixed with "Copy of") are created when you "copy and paste", "cut and paste", or "move and paste" to a location that already contains a file or folder with the same name. For example, if you copy or cut the folder `Events` and paste it to a destination containing that folder, the new pasted version is named `Copy of Events`. This happens when Oracle WebCenter Portal is configured to use Framework Folders as the folder service. If `Folders_g` is configured, files and folders are not duplicated if a matching copy is found at the target.
-

19.12 Deleting Folders and Files

When you delete a folder, all the subfolders and files the folder contains are also deleted in the content repository. When you delete a folder, this action is not reflected in the Activity Stream in the Home portal.

Notes:

- The root folder cannot be deleted.
- To use Windows Explorer to move folders and files in a portal when the back-end content repository is Content Server, see [Section 21.4.2, "Working with Files Using Windows Explorer."](#)

To delete one or more folders or files:

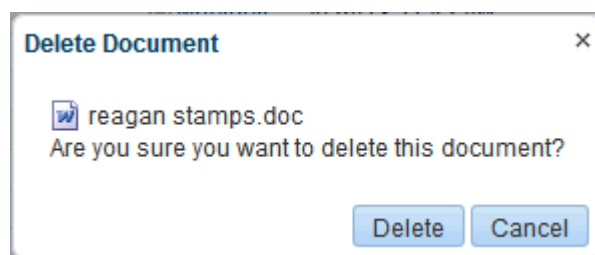
1. On the **Documents** page or in the Document Explorer, Document Manager, or Folder Viewer on a page, click in the row of the folder(s) or file(s) you want to delete.

To select multiple folders or files, Ctrl-click in the rows.

2. Click the **File** menu, and select **Delete**, or right-click to display the context menu and choose **Delete**.

The Delete dialog opens ([Figure 19–37](#)).

Figure 19–37 *Deleting a File*



3. Click **Delete** to delete your selection from the content repository.

19.13 Refreshing Folder Contents

Refreshing the contents of the current folder retrieves all changes made in the content repository since the last retrieval.

To refresh folder contents:

- On the **Documents** page or in a Document Explorer, Document Manager, or Folder Viewer, click the **View** menu, and select **Refresh Content**.
- In the Document List Viewer, click the **Refresh** icon.

19.14 Hiding and Showing Folders

To hide or show the folders in a listing of folders and files:

- On the **Documents** page or in a Document Explorer, Document Manager, or Folder Viewer, click the **View** menu, and select **Hide Folders**.

When folders are hidden, a check displays alongside the **Hide Folders** menu selection.

19.15 Managing Tags on Files

Tags specify keywords related to the content of a file. Tags are useful for making a file more widely discoverable in search results.

Note: See [Section 33.3.3, "Viewing Tags in Search Results"](#) for information about searching on tags.

To work with the tags for a file:

1. Access tags by performing one of the following actions:
 - On the **Documents** page or in the Document Explorer, Document Manager, or Folder Viewer on a page, click the **View** menu, and select **Details**, or right-click to display the file's context menu and choose **Details**.
 - In the Document Viewer preview pane, scroll to the bottom of the document and click the **Tags** tab ([Figure 19-38](#)).
 - In the Rich Text Editor, scroll to the bottom of the HTML document, wiki, or blog post, and click the **Tags** tab.

Figure 19–38 Tags Pane

Home Documents Customer Interactions Site Analytics

> wcproduct > Dev Forum > TechTalk2.wrf

File View Upload New Version Download ☆ 0

Basic
 Edit

Name TechTalk2.wrf
 Identifier DFS_CS#dDocName:SLC01QPBUSORAC028403

Description The second tech talk recording.
 Type Document
 Size 35.5 MB

Created 10/18/12 2:28 PM
 Created By Shaun
 Last Modified 10/18/12 2:28 PM
 Last Modified By Shaun

Advanced

Last modified on 10/18/12 2:28 PM by Shaun Version 1 35.5 MB

Comments (0) **Tags** History Links Recommendations

Tags
 dev techtalk analysis classpath memory

Add Tags

Recommended Tags
 analysis dev memory classpath techtalk

Shared

- In the **Tags** pane, enter new tags, and edit or delete existing tags as your permissions allow, then click **Save**.

See Also: For information about tags in WebCenter Portal, see [Chapter 33, "Working with Tags."](#)

19.16 Viewing and Deleting File Version History

If you edit and save a file, or upload a file with **Always create a new version** selected in the Upload dialog (Figure 19–39), WebCenter Portal creates a new version of the file if it already exists in the current folder. When a file has multiple versions, it has a version history.

Figure 19–39 Upload Document Pane (in FireFox browser)

Upload Document to /Enterprise Libraries/Philatelists Up

Destination /Enterprise Libraries/Philatelists

Enter your description here

Drop files here or [Select files](#)

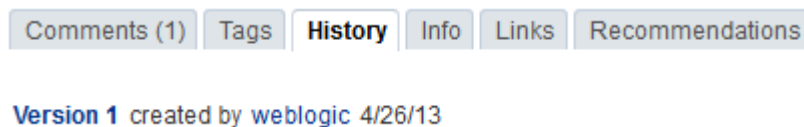
Always create a new version

This section describes how to view a file's version history to track when a file was last revised, to determine which user revised it, and to delete a particular file version. For wiki documents and blog posts, you can also compare versions.

Note: To use the task pane available through Microsoft Office shared document management functionality to work with a Microsoft Word, Excel, or PowerPoint file's version history, see [Section 19.16, "Viewing and Deleting File Version History."](#)

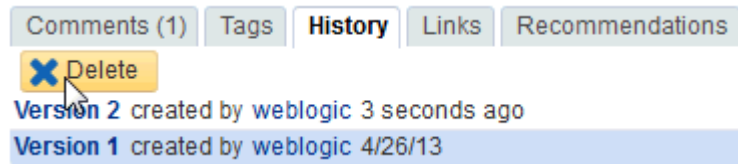
To view or delete versions of a file:

1. Access the history by performing one of the following actions:
 - On the **Documents** page or in the Document Explorer, Document Manager, or Folder Viewer on a page, click the **View** menu, and select **Details**, or right-click to display the file's context menu and choose **Details**.
 - In the Document Viewer preview pane, scroll to the bottom of the document and click the **History** tab ([Figure 19–40](#)).
 - In the Rich Text Editor, scroll to the bottom of the HTML document, wiki, or blog post, and click the **History** tab ([Figure 19–40](#)).

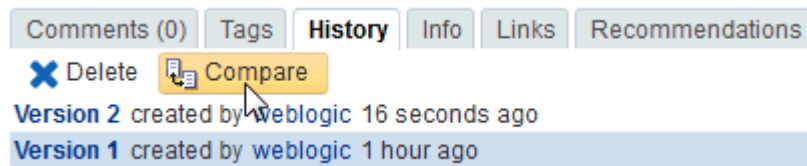
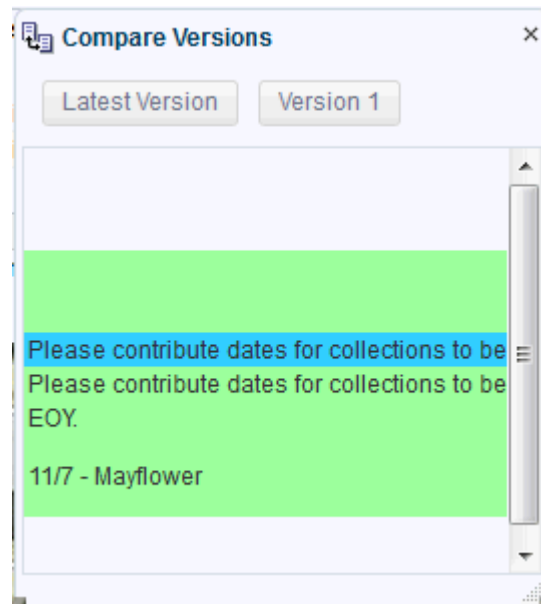
Figure 19–40 History Pane

2. Select a version of the file to display a preview of that version in the preview pane.
3. To delete a particular version, select it in the History pane, then click **Delete** ([Figure 19–41](#)).

Note: The **Delete** icon displays only if you have been granted delete permissions.

Figure 19–41 Deleting a Version of a File

4. (For wiki documents and blog posts only) To compare a particular version with the current version of the file, select it in the History pane, then click **Compare** to open the Compare Versions dialog, showing the differences (Figure 19–42 and Figure 19–43).

Figure 19–42 Comparing Older Version with Current Version (Wiki or Blog)**Figure 19–43 Compare Versions Dialog (Wiki or Blog)**

19.17 Working with Folder and File Properties

Folder and file properties provide access to informational details. You can use file properties to perform activities such as rename a file, modify a file description, or change file metadata values.

Additionally, both folder and file properties provide read-only information about location, type, creation and modification dates, and the users who created or last modified the folder or file.

To access folder or file properties, refer to the steps in the following sections:

- [Section 19.17.1, "Working with Folder Properties"](#)
- [Section 19.17.2, "Working with File Properties"](#)

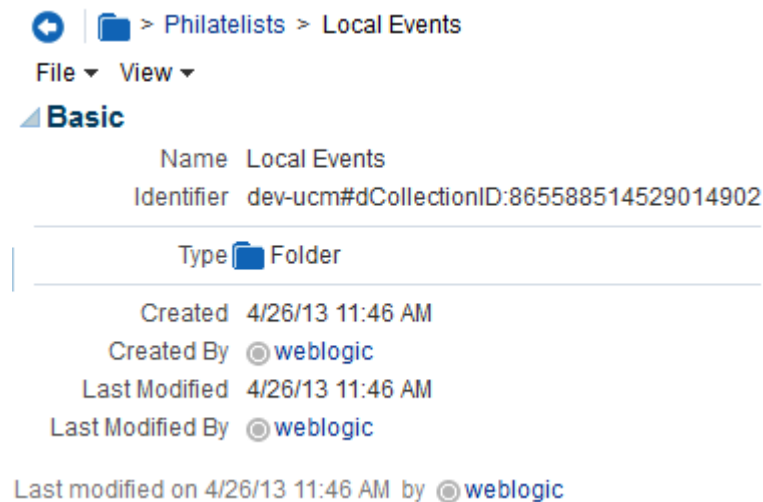
19.17.1 Working with Folder Properties

To view folder properties:

1. On the **Documents** page or in the Document Explorer, Document Manager, or Folder Viewer on a page, click in the row of the folder.
2. Click the **View** menu, and select **Details**, or right-click to display the folder's context menu and choose **Details**.

The Basic properties pane opens ([Figure 19–44](#)). Folder properties are not editable. To change the folder name, see [Section 19.9, "Renaming a Folder or File."](#)

Figure 19–44 Folder Properties



19.17.2 Working with File Properties

To view or modify file properties:


1. On the **Documents** page or in the Document Explorer, Document Manager, or Folder Viewer on a page, click in the row of the file.

Alternatively, you can view properties of an open file in the Document Viewer preview pane.
2. Depending on your view, perform one of the following actions:
 - On the **Documents** page or in the Document Explorer, Document Manager, or Folder Viewer on a page, click the **View** menu, and select **Details**, or right-click to display the file's context menu and choose **Details**.
 - In the Document Viewer preview pane:
 - If the file type supports an in-place preview of the file contents, scroll to the bottom of the preview and click the **Info** tab ([Figure 19–45](#)).
 - If the file type does not support a preview (for example, .mp3 music files, video files, or .ini files) or if you are using an Apple iOS device, the preview pane displays the file properties (see [Figure 19–46](#)) rather than a

preview of the file content.


Figure 19-45 Document Viewer: File Properties in Tabbed Info Pane



Comments (1) Tags History **Info** Links Recommendations



Basic
Edit

Name lincoln stamps.doc
Identifier dev-ucm#dDocName:SLC04RNTUSORAC010406

Description
Type  Document
Size 133 KB

Created 4/26/13 11:42 AM
Created By  weblogic
Last Modified 4/28/13 11:32 PM
Last Modified By  weblogic

Advanced

Figure 19–46 Document Viewer: File Properties in Preview Pane

The screenshot shows the 'Document Viewer' interface. At the top, the breadcrumb path is '> dev-ucm > Enterprise Libraries > Philatelists > Stamps > lincoln stamps.doc'. Below the path are menu options: 'File', 'View', 'Edit with Word' (with a Word icon), 'Upload New Version' (with an upload icon), 'Download' (with a download icon), and a star icon with '0'. A small thumbnail of the document is visible. Below the thumbnail is the 'Basic' tab, which includes an 'Edit' button (with a gear icon). The 'Basic' section displays the following properties:

- Name: lincoln stamps.doc
- Identifier: dev-ucm#dDocName:SLC04RNTUSORAC052009
- Description:
 - Type: Document (with a Word icon)
 - Size: 133 KB
- Created: 6/13/13 12:34 PM
- Created By: Karen Walker
- Last Modified: 6/13/13 12:34 PM
- Last Modified By: Karen Walker

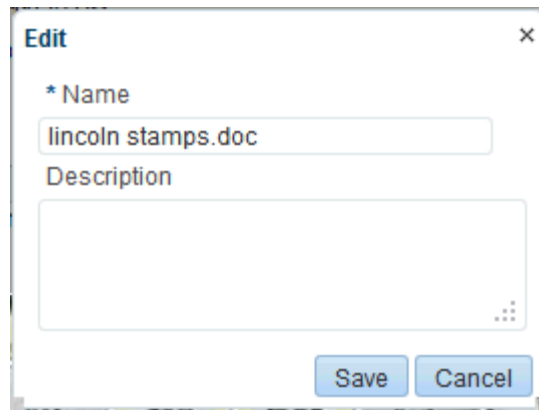
Below the 'Basic' section is the 'Advanced' section, which shows 'Last modified on 6/13/13 12:34 PM by Karen Walker Version 1 133 KB'. At the bottom of the 'Advanced' section are tabs for 'Comments (0)', 'Tags', 'History', 'Links', and 'Recommendations'. A text input field is present below the tabs, and a 'Comment' button is at the bottom of the input area.

- To modify the editable Basic properties, click **Edit** in the Basic properties area. In the Edit dialog (Figure 19–47), revise the file name and description as desired, then click **Save**.

Note: If WebCenter Portal is configured to use FrameworkFolders as the folder service, the following characters are not allowed in folder and file names:

? # & / \ * " | < > : ^

Letters, numbers, spaces, and periods (.) are allowed.

Figure 19–47 Edit Dialog for Basic Properties

4. To modify the editable Advanced properties, click **Edit** in the Advanced properties area. In the Edit dialog (Figure 19–48), revise the property values as desired, then click **Save**.

Note: To enable **Edit** functionality on Advanced properties, *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 "createJCRContentServerConnection" and "setJCRContentServerConnection" sections in *WebLogic Scripting Tool Command Reference*.
-

Figure 19–48 Advanced Properties Edit Dialog

The screenshot shows a web-based dialog titled 'Edit' with a sub-header 'Update metadata'. Below this is a form titled 'Info Update Form for "lincoln stamps.doc"'. The form contains several fields:

- Content ID:** MYSERVERUSORACL
- * Type:** Document - Any generic document (dropdown menu)
- * Title:** lincoln stamps.doc (text input)
- * Author:** weblogic (text input) and weblogic (dropdown menu)
- * Security Group:** WC0510 (dropdown menu)
- Account:** s2e153df8c3d64ac5881568f6t (text input)
- * Revision:** 1 (text input)

Note: Most advanced properties are unique to the content repository (such as Content Server) where the file is stored.

19.18 Managing Document Links

Links provide 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. To create links, you must be granted the `Links-Create` Links permission.

Note: If you create a link using the **Select Resource** or **Add Resource** icons in the RTE (see Table 19–4, "Rich Text Editor Toolbar Icons and Controls on Rich Text Tab"), the resulting inline link is not added to the **Links** tab associated with the details of the linking HTML document, wiki, or blog post. If you require a link to appear on the **Links** tab, you must add it using the **Link to New** and **Link to Existing** menus on the **Links** tab, as described in the steps below, which also adds a corresponding link on the **Links** tab for the linked resource.

To work with the links for a file:

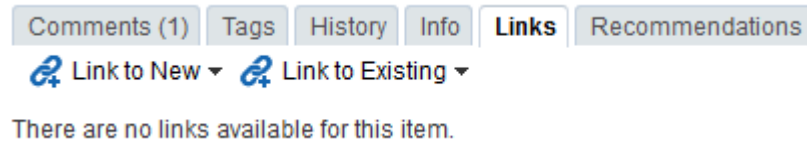
1. On the **Documents** page or in the Document Explorer, Document Manager, or Folder Viewer on a page, click in the row of the file.

Alternatively, you can view the links of an open file in the Document Viewer preview pane.

2. Depending on your view, perform one of the following actions:

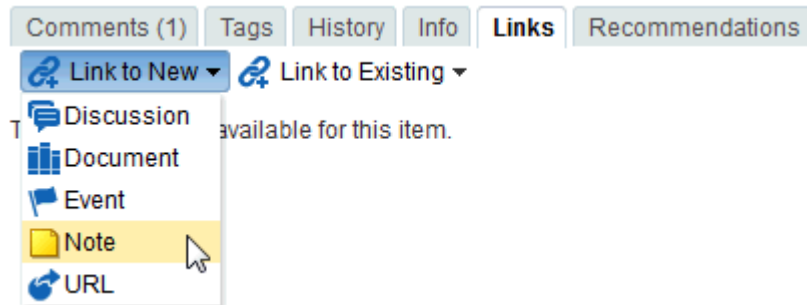
- On the **Documents** page or in the Document Explorer, Document Manager, or Folder Viewer on a page, click the **View** menu, and select **Details**, or right-click to display the file's context menu and choose **Details**.
- In the Document Viewer preview pane, scroll to the bottom of the document and click the **Links** tab (Figure 19-49).

Figure 19-49 Links Pane



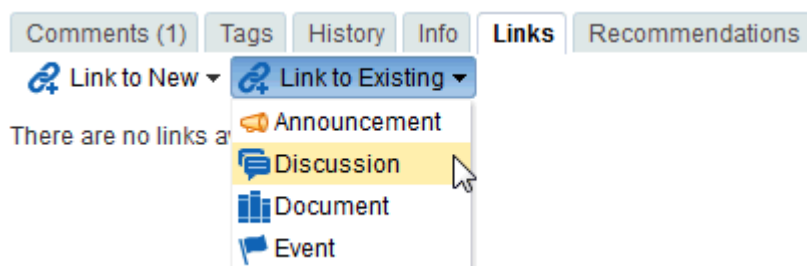
3. On the **Links** tab, click **Link to New** and select the required item to create and link to discussion forum topics, events, or notes; upload and link to documents, or enter the URL of a web page to link to (Figure 19-50).

Figure 19-50 Adding a Link to a New Discussion, Document, Event, Note, or URL

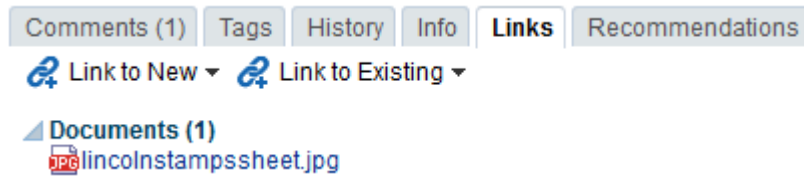


4. Click **Link to Existing** and select the required item to link to an existing announcement, discussion forum topic, document, or event (Figure 19-51).

Figure 19-51 Adding a Link to an Existing Announcement, Discussion, Document, or Event



The links that you add are listed on the **Links** tab for the document, and a corresponding link to the document is listed on the **Links** tab for the linked resource.

Figure 19–52 Link to Another Document

See Also: For more information about creating links in WebCenter Portal, see [Chapter 32, "Linking Information in WebCenter Portal."](#)

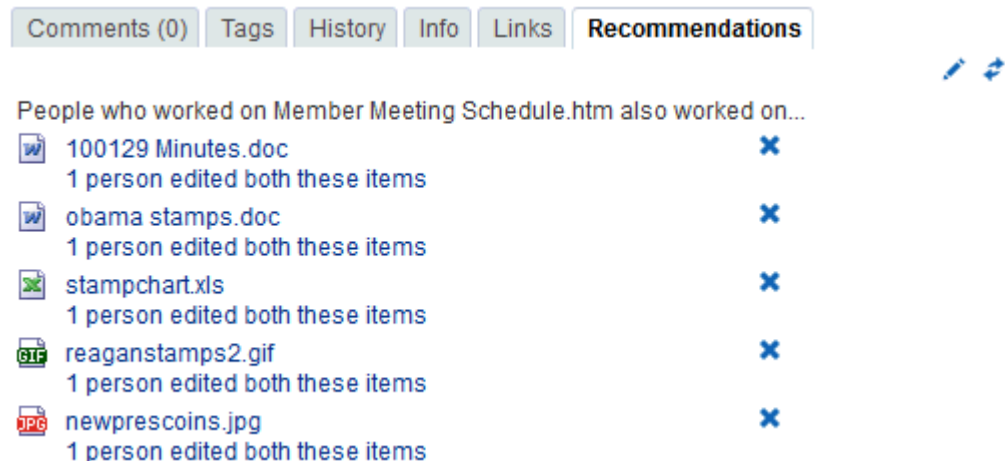
19.19 Viewing Document Recommendations

Note: The Recommendations pane displays only if Activity Graph is configured. This is a system administrator task, described in the "Activity Graph Prerequisites" section in *Administering Oracle WebCenter Portal*.

The **Recommendations** pane provides suggestions of other documents you might want to view, based on the current document.

To work with the recommendations for a file:

1. On the **Documents** page or in the Document Explorer, Document Manager, or Folder Viewer on a page, click in the row of the file.
Alternatively, you can view the links of an open file in the Document Viewer preview pane.
2. Depending on your view, perform one of the following actions:
 - On the **Documents** page or in the Document Explorer, Document Manager, or Folder Viewer on a page, click the **View** menu, and select **Details**, or right-click to display the file's context menu and choose **Details**.
 - In the Document Viewer preview pane, scroll to the bottom of the document and click the **Recommendations** tab ([Figure 19–53](#)).

Figure 19–53 Recommendations Pane

- Click the **Display Options** icon (Figure 19-54) to open the Display Options dialog (Figure 19-55), where you can select the items you want to show on the **Recommendations** tab.

Figure 19-54 Recommendations Display Options Icon

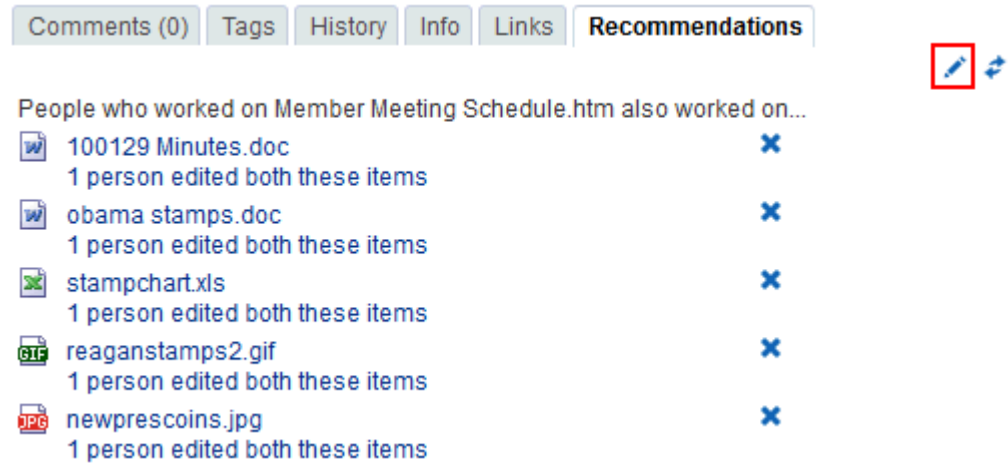
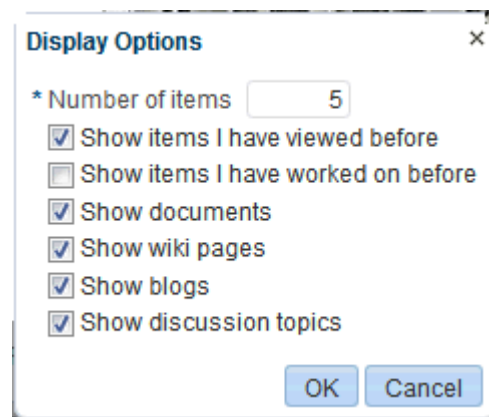


Figure 19-55 Display Options for Recommendations



- In the Recommendations pane:
 - Click the **Delete** icon to delete the associated recommendation.
 - Click the link text for each recommendation to view that document.
 - Click the **Refresh** icon to display the most recent recommendations.

See Also: For more information about working with recommendations, see [Chapter 23, "Exploring Recommendations and Content."](#)

19.20 Opening or Saving PDF Files

From the Document Viewer preview pane, you can open or save the PDF version of the currently open file to your local file system. This choice is available for any file type for which Content Server is configured to convert to PDF.

Note: To enable the conversion of wikis and blogs into PDF, your system administrator must configure the WebCenter Conversion component, as described in the "Enabling the Conversion of Wikis and Blogs into PDFs" section in *Administering Oracle WebCenter Portal*, and Oracle WebCenter Content settings for document conversion using IBR must be configured correctly.

To open or save a file in PDF:

- In the Document Viewer preview pane, click the **View** menu, and select:
 - **Open as PDF** to open the file in a new tab in your browser in Adobe Acrobat Reader's PDF Viewer plug-in.
 - **Download PDF** to open a browser dialog where you can save the file to your local file system as a PDF file.

19.21 Sharing the URL for a Folder or File

With appropriate permissions (see [Section 19.22, "Setting Security Options on a Folder or File"](#)), users can directly access folders and files by clicking the URL, or entering it in a browser. You can retrieve and share the URL to a folder or file in several ways, as described in the following sections:

- [Section 19.21.1, "Retrieving the URL for a Folder or File"](#)
- [Section 19.21.2, "Mailing the URL for a Folder or File"](#)
- [Section 19.21.3, "Publishing the URL for a File to Activity Streams"](#)

19.21.1 Retrieving the URL for a Folder or File

Every folder and file that resides in a connected content repository can be accessed through a direct URL, which you can provide to other users. If they have permissions to access the folder or file, they can click the URL link to open the folder or file directly in a WebCenter Portal application, open the file in its default application, or save the file to their local file system.

To retrieve the URL for a folder or file:

1. Open the Get a Link dialog in any of the following ways:
 - On the **Documents** page or in the Document Explorer, Document Manager, or Folder Viewer on a page, click in the row of the folder or file, then click the **View** menu, and select **Get a Link**.
 - Right-click in the folder or file's row to display the context menu and choose **Get a Link**.
 - If you are already viewing a file in the Document Viewer preview pane, click the **View** menu, and select **Get a Link**.

The **Direct URL** provides a direct link to open the folder or file in WebCenter Portal application. For files, the **Download URL** provides a direct link to allow users to open the file in its default application, or choose to save the file to their local file system ([Figure 19-56](#)).

Note: **Download URL** is not available for folders.

Figure 19–56 Direct and Download URLs in Get a Link Dialog

2. Drag your mouse pointer over the URL to select it, then press Ctrl-c to copy it so that you can paste it wherever you need it.

19.21.2 Mailing the URL for a Folder or File

From the Document Viewer preview pane, you can send a mail message to other users with the body of the message populated with the direct URL to the currently open folder or file. If the folder or file is in a portal, the direct URL to the portal is also included.

Notes:

- *When the FrameworkFolders folder service is enabled, folders and files include parent information in their metadata. Therefore, users can access a folder or file only if they also have access to the parent folder. This means that you cannot share a folder or file from your personal document library (the **Documents** page in the Home portal) by only providing the URL, because other users do not have access to the parent folder for your personal documents. Instead, you can either copy the file to the Public folder, or share a personal file through Publisher, which stores shared items in the Public folder of your personal document library. See [Section 15.7.3, "Sharing Files Through Publisher."](#)*
 - To enable others to manage the shared folder or file, you can modify the permissions, as described in [Section 19.22, "Setting Security Options on a Folder or File."](#)
 - To use the task pane available through the Microsoft Office shared document management functionality to send a message to any user who has a mail address defined in WebCenter Portal, see [Section 21.3.4.12, "Sending a Message."](#)
-
-

To send the URL to folder or file in a mail message:

1. Open the folder or file in the Document Viewer preview pane in either of the following ways:
 - On the **Documents** page or in the Document Explorer, Document Manager, or Folder Viewer on a page, click in the row of the folder or file, then click the **View** menu, and select **Details**.
 - Right-click in the folder or file's row to display the context menu and choose **Details**.
2. In Document Viewer preview pane, click the **File** menu, and select **Send Mail** to open the mail message in your default mail application.
3. Modify the mail message as desired, and send it.

19.21.3 Publishing the URL for a File to Activity Streams

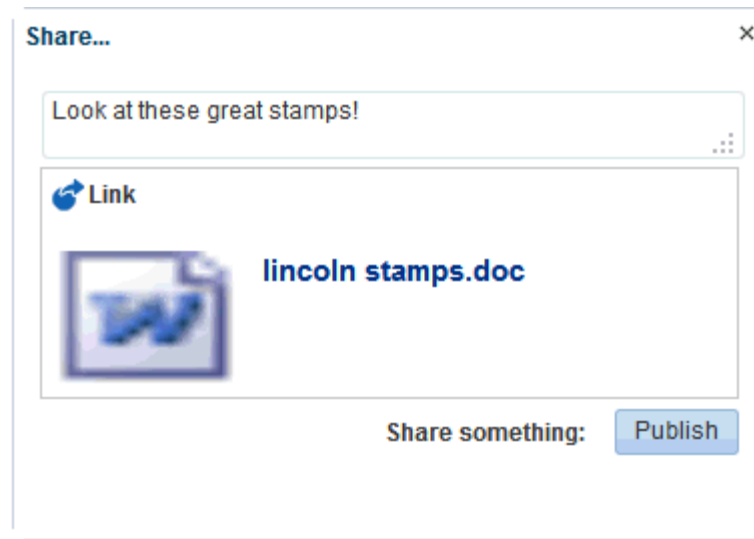
You can publish the URL for a file to the Activity Stream. Depending on whether you are sharing a personal file or a portal file, the shared file can appear in your connections' Activity Streams or in a portal's Activity Stream.

Notes:

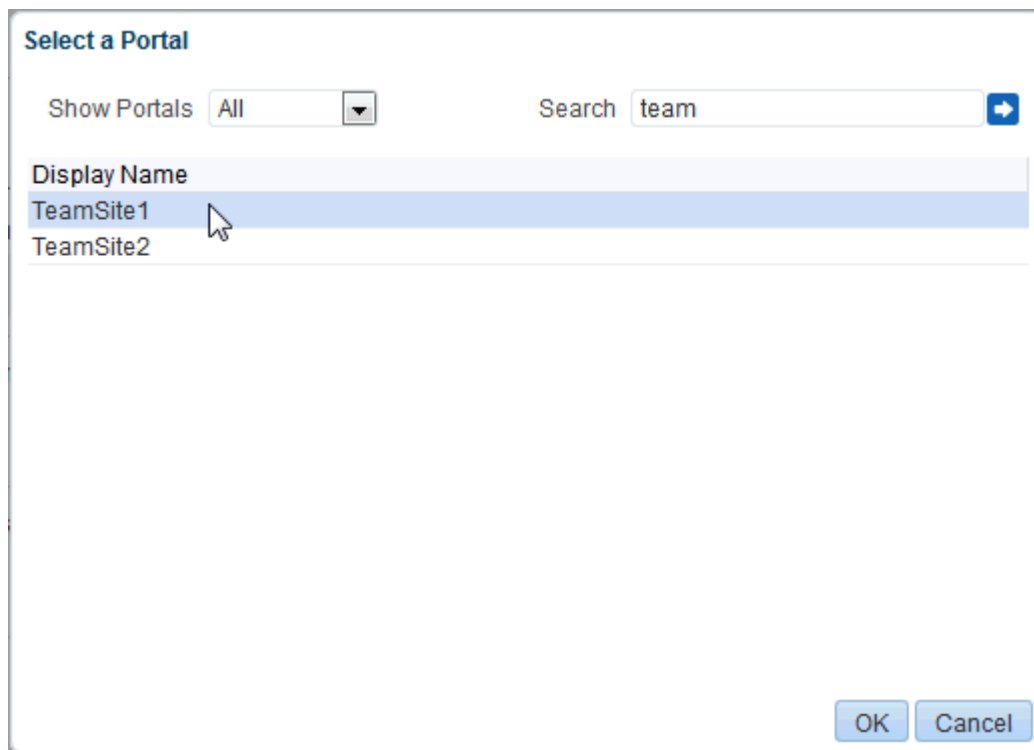
- A portal's Activity Stream can be displayed in the portal, but portal members can also display a portal's activities in their own Activity Streams.
 - *When the FrameworkFolders folder service is enabled, folders and files include parent information in their metadata. Therefore, users can access a folder or file only if they also have access to the parent folder. This means that you cannot share a folder or file from your personal document library (the **Documents** page in the Home portal) by only providing the URL, because other users do not have access to the parent folder for your personal documents. Instead, you can either copy the file to the Public folder, or share a personal file through Publisher, which stores shared items in the Public folder of your personal document library. See [Section 15.7.3, "Sharing Files Through Publisher."](#)*
 - To enable others to manage the shared folder or file, you can modify the permissions, as described in [Section 19.22, "Setting Security Options on a Folder or File."](#)
-
-

To share a file to Activity Streams:

1. Open the Share dialog ([Figure 19-57](#)) in any of the following ways:
 - On the **Documents** page or in the Document Explorer, Document Manager, or Folder Viewer on a page, click in the row of the file, then click the **File** menu, and select **Share**.
 - Right-click in the file's row to display the context menu and choose **Share**.
 - If you are already viewing a file in the Document Viewer preview pane, click the **File** menu, and select **Share**.

Figure 19–57 Share Dialog

2. Optionally, enter a comment to appear with the URL.
3. If you are sharing a personal file, select an option from the **Share with** menu.
 - Select **Everyone** to share the item with all of your connections. The shared file will appear in your connections' Activity Streams.
 - Select **Portals** to open the Select a Portal dialog (Figure 19–58) and select a portal. The shared file will appear in the selected portal's Activity Stream.

Figure 19–58 Select a Portal Dialog

From the **Show portals** menu:

- Select **All** to show all of the portals to which you have access.
- Select **Joined** to show all of the portals you have explicitly joined.
- Select **Moderated** to show all of the portals for which you are a moderator.
- Select **Public** to show all public portals.

Alternatively, enter the name of a portal in the **Search** field and execute the search. Results appear in the dialog.

Click a portal, and click **OK**.

4. Click **Publish**.

The URL to the file along with your comments, if any, are added to your Activity Stream and, as appropriate, your connections' Activity Streams or the portal's Activity Stream.

19.22 Setting Security Options on a Folder or File

Permissions: To set security on a document in a portal, you must have Documents: Administration permission, granted by the portal manager.

For information about roles and permissions, see the "Understanding Permissions and Permission Models in a Portal" section in *Building Portals with Oracle WebCenter Portal*.

Security can be set on a folder or a file through inheritance from the parent folder, or by setting custom permissions. If set on a folder, the security is propagated to child files and folders that do not already have their own custom permissions defined. A child file or folder (at any depth) that already has custom permissions defined will retain that security definition.

Note: *When the FrameworkFolders folder service is enabled:*

- You can set security on a file, but not on a folder.
 - Folders and files include parent information in their metadata. Therefore, users can access a folder or file only if they also have access to the parent folder. This means that you cannot share a folder or file from your personal document library (the **Documents** page in the Home portal) by only changing the security options of the folder or file, because other users do not have access to the parent folder for your personal documents. Instead, you can either copy the file to the Public folder, or share a personal file through Publisher, which stores shared items in the Public folder of your personal document library. See [Section 15.7.3, "Sharing Files Through Publisher."](#)
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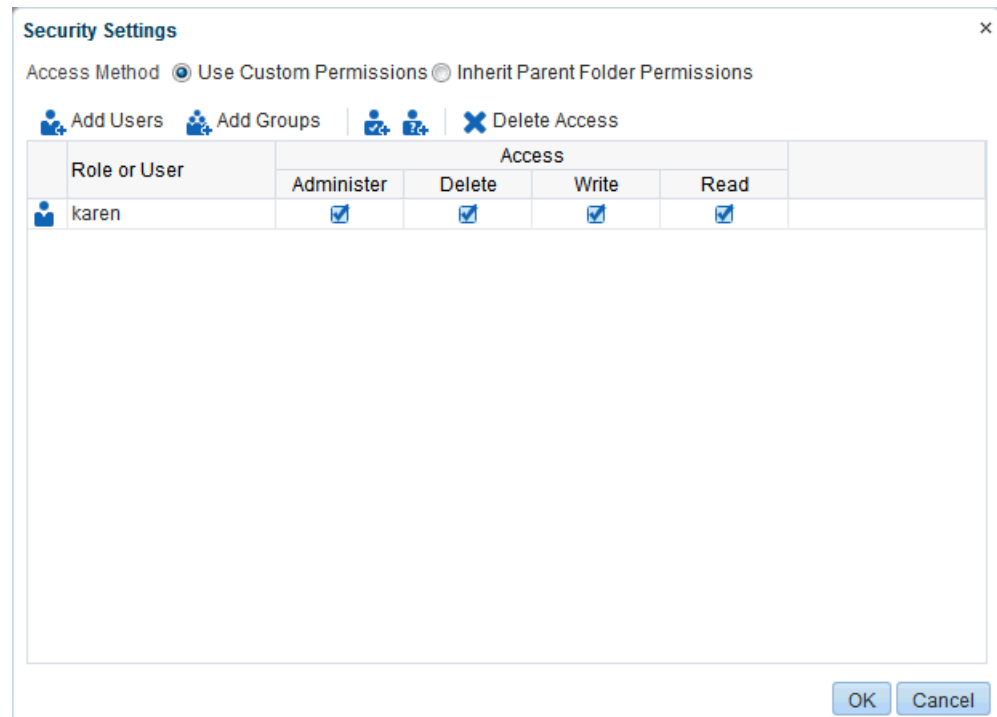
To set security options on a folder or file:

1. Verify that the system administrator has completed the prerequisite steps before setting security options on a folder or file, as described in the "Configuring Item

Level Security in WebCenter Portal Applications" section in *Administering Oracle WebCenter Portal*.

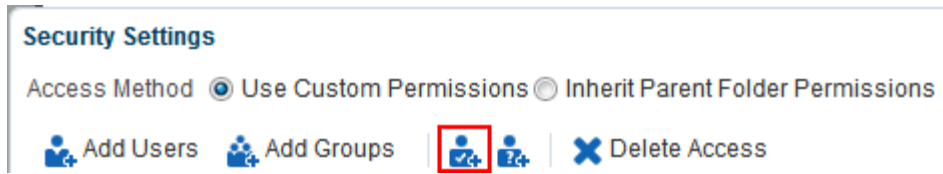
2. Open the Security Settings dialog (Figure 19–59) in any of the following ways:
 - On the **Documents** page or in the Document Explorer, Document Manager, or Folder Viewer on a page, click in the row of the folder or file, then click the **File** menu, and select **Security**.
 - Right-click in the folder or file's row to display the context menu and choose **Security**.
 - If you are already viewing a file in the Document Viewer preview pane, click the **File** menu, and select **Security**.

Figure 19–59 Security Settings Dialog



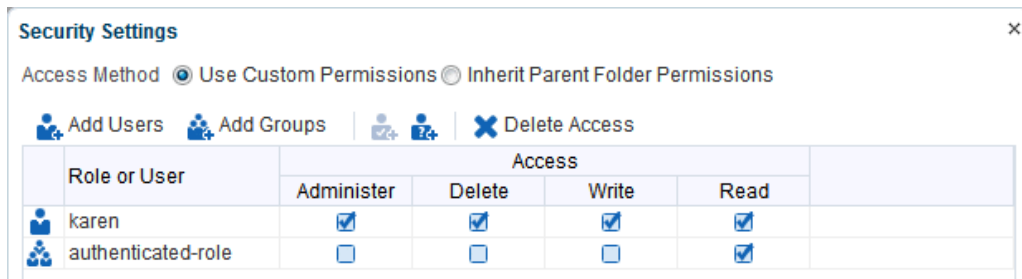
3. Select the **Access Method**:
 - To specify that the folder or file should inherit access settings from the parent folder, select **Inherit Parent Folder Permissions**, then click **OK** to save your changes and exit the dialog.
 - To set custom access on the current folder or file, select **Use Custom Permissions**, and continue with the next steps.
4. To grant 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** icon (Figure 19–60).

Figure 19–60 Add Authenticated Role for Logged in User Access Icon



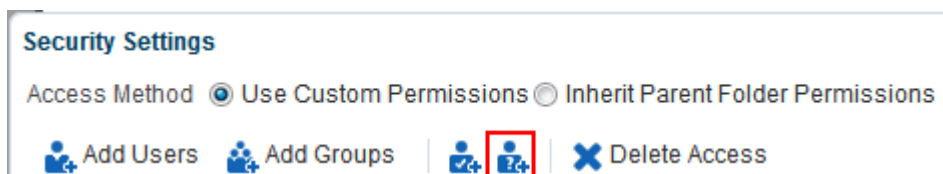
The role `authenticated-role` is added under **Role or User** with default **Read** access to the folder or file, and the option to grant **Administer**, **Delete**, and **Write** permissions (Figure 19–61).

Figure 19–61 authenticated-role Default Security Settings



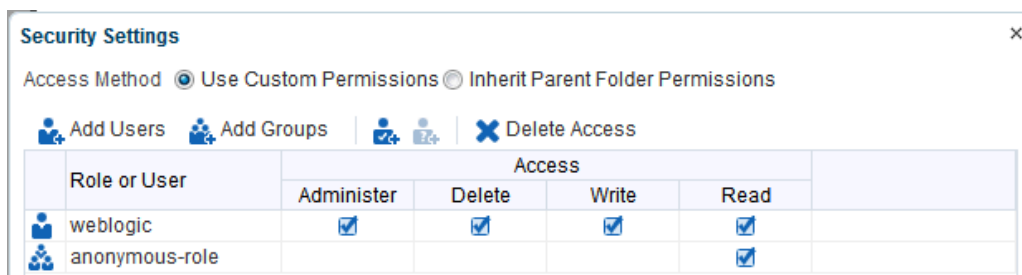
- To grant access permissions to all public users (that is, users who have not logged in to WebCenter Portal), click the **Add Anonymous Role for Public Access** (Figure 19–62).

Figure 19–62 Add Anonymous Role for: Access Icon



The role `anonymous-role` is added under **Role or User** with default **Read** access to the file (Figure 19–63).

Figure 19–63 anonymous-role Default Security Settings



- To grant access permissions to selected members of the portal, click **Add Users** or **Add Groups** to open the corresponding Search dialog where you can select users or groups to populate the list in the Security Settings dialog. For tips on searching for a user or group in the identity store, see the Searching for a User or Group in the Identity Store" section in *Building Portals with Oracle WebCenter Portal*.

7. For each user, group, or role, grant access by selecting one or more access privileges from the **Access** columns: **Administer**, **Delete**, **Write**, and **Read**.
8. Click **OK** to save your changes and close the Security Settings dialog.

19.23 Subscribing to a File

To receive notifications about the activities on a file, you can subscribe to it. Whenever a user comments on, likes, updates, or deletes the file, you will be notified through your selected messaging channel.

See Also: For more information, see [Section 22.2, "Establishing and Managing Your Messaging Channels and Filters."](#)

To subscribe to a file:

1. On the **Documents** page or in the Document Explorer, Document Manager, or Folder Viewer on a page, click the file to open it in the Document Viewer preview pane.
2. From the **File** menu, select **Subscribe**.
3. If you no longer wish to monitor the activities on a file, click the **File** menu, and select **Unsubscribe**.

19.24 Liking a File

For information on liking a file, see [Section 15.2, "Liking Items."](#)

19.25 Adding a Folder or File to Your Favorites

For quick access to a folder or file (including wiki documents and blog posts), you can add it to your personal favorites.

See Also: For more information, see [Chapter 4, "Managing Your Favorites."](#)

To add a folder file to your personal WebCenter Portal favorites:

1. Open the folder or file in the Document Viewer preview pane in either of the following ways:
 - On the **Documents** page or in the Document Explorer, Document Manager, or Folder Viewer on a page, click in the row of the folder or file, then click the **View** menu, and select **Details**.
 - Right-click in the folder or file's row to display the context menu and choose **Details**.
2. In Document Viewer preview pane, click the **File** menu, and select **Add To Favorites**.

19.26 Searching for Documents

In addition to WebCenter Search, which searches a particular portal or across all portals (see [Chapter 3, "Searching for Information"](#)), Documents provides its own search engine for file searches. A Documents search saves time and increases the relevancy of results by narrowing the scope of a search to files.

In WebCenter Portal, Documents search searches within a specific portal root folder.

Note: When searching for content stored in the connected Content Server repository, full-text search must be enabled in Content Server through either of the following methods:

- OracleTextSearch (preferred), as described in the "Configuring OracleTextSearch for Content Server" section in *Installing and Configuring Oracle WebCenter Content*
- DATABASE.FULLTEXT, as described in the "Configuring the Full-Text Features in the WebCenter Content Repository" section in *Installing and Configuring Oracle WebCenter Content*

The Oracle Secure Enterprise Search (SES) adapter does *not* need to be configured to use Documents search.

The document search feature is exposed in the Document Manager, Document Explorer, and Folder Viewer. It provides two levels of search: Basic and Advanced. To perform Basic and Advanced searches for files, refer to the following sections:

- [Section 19.26.1, "Running a Basic Document Search"](#)
- [Section 19.26.2, "Running an Advanced Document Search"](#)

19.26.1 Running a Basic Document Search

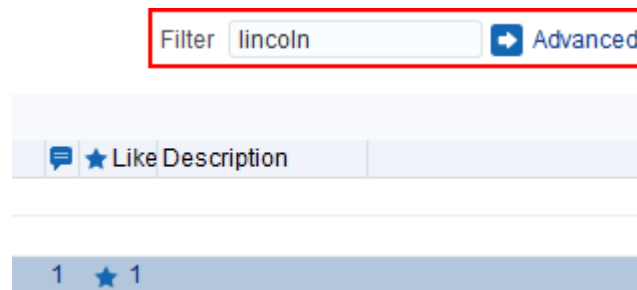
A basic document search searches the connected content repository for the specified file name. To include more search criteria, see [Section 19.26.2, "Running an Advanced Document Search."](#)

To perform a basic document search:

1. On the **Documents** page or in the Document Explorer, Document Manager, or Folder Viewer on a page, enter a full or partial file name in the **Filter** field ([Figure 19–64](#)).

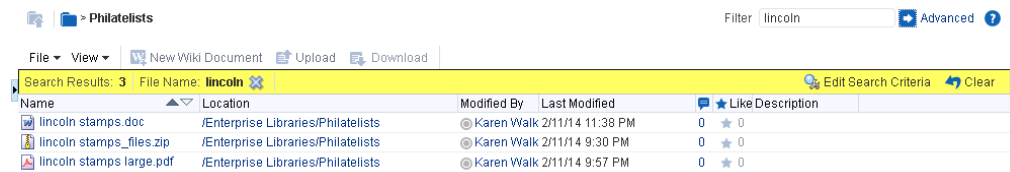
Tip: Searching with wildcards (for example, * or %) is not supported due to its potential impact on performance.

Figure 19–64 Filter Field



2. Press the Enter key, or click the **Search** icon.

The search results pane displays files matching the search string ([Figure 19–65](#)).

Figure 19–65 Search Results Pane

In the search results pane, the presence of the highlighted area indicates that you are looking at the results of a query, not the contents of a folder. Look in the **Location** column to determine where a file or folder is located. Alternatively, click the file name to open it from the Search Results pane.

3. In the Search Results pane:
 - Click the **Clear** action to clear the **Filter** field and return to the default folder display.
 - Click **Edit Search Criteria** action to open the Advanced Search dialog, where you can specify additional search criteria, as described in [Section 19.26.2, "Running an Advanced Document Search."](#)

19.26.2 Running an Advanced Document Search

You can specify more granular search options to search the connected content repository to generate results for a specified file name, keywords, folder, content type, dates, users, or properties that are defined for the selected content profile.

To perform an advanced document search:

1. Open the Advanced Search dialog in either of the following ways:
 - On the **Documents** page or in the Document Explorer, Document Manager, or Folder Viewer on a page, click **Advanced** next to the **Filter** field.
 - Click **Edit Search Criteria** in the highlighted toolbar area of the Search Results pane ([Figure 19–65](#)).

The **Advanced Search** dialog opens ([Figure 19–66](#)).

Figure 19–66 Advanced Search Dialog

2. Enter search terms in one or more of the fields:
 - **File Name:** Enter a full or partial file name.

Tip: Searching with wildcards (for example, * or %) is not supported due to its potential impact on performance.
 - **Keywords:** Enter words to search for in the content of the file or tags applied to the file.
 - **Look In:** Click the **Browse** icon to open a list of content repository folders, then drill down to the desired folder.
 - **Content Type:** Choose **All Content Types** to retrieve content items regardless of the content type. Or, choose from the list the name of a content type profile defined in the Content Server repository. A content type profile specifies the 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 profile defined in Content Server that can be applied if no other content profiles are defined.
 - **Limit Results:** Specify the maximum number of files to be returned by the search.
 - **Dates:** In the **Created** and/or **Last Modified** fields, select a modifier to search for files matching an exact date (**is**), a following date (**is after**), a preceding date (**is before**), or a date between two other dates (**is between**).

Selecting **is between** adds an additional date field for entering the end date (Figure 19–67). Enter a beginning date and an end date; the end date is *not* inclusive.

Figure 19–67 Dates Search Fields

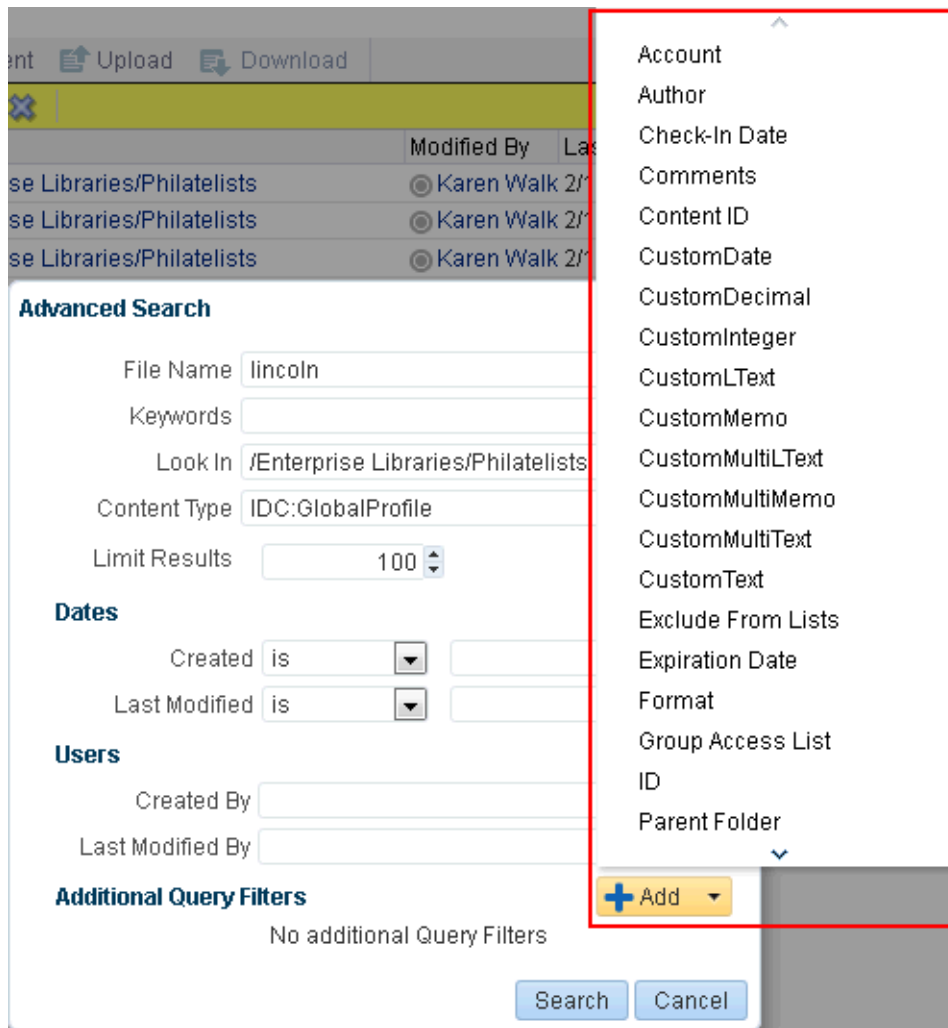
The image shows a search interface titled "Dates". It contains two rows of search criteria. The first row is "Created" with a dropdown menu set to "is between", followed by two empty date input fields with calendar icons, and the word "and". The second row is "Last Modified" with a dropdown menu set to "is", followed by one empty date input field with a calendar icon.

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.

- Users:** In the **Created By** and **Last Modified By** fields, enter a user name to search for files that the user created (uploaded) or last modified. 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 the "Searching for a User or Group in the Identity Store" section in *Building Portals with Oracle WebCenter Portal*.

Note: In WebCenter Portal, when you search in a portal, the user selection list and the user search find user names for current members of the portal.

- Additional Query Filters:** Not applicable when **Content Type** is set to **All Content Types**. For a selected content type profile (prefixed **IDC**), click the **Add** icon (Figure 19–68) to list all the properties that are defined for the selected profile. Select one or more properties to refine the query to find files with specific property settings.

Figure 19–68 Additional Query Filters Search

3. Click **Search** to execute the advanced search.

Files matching the search criteria display in the Search Results pane.

19.27 Working with Workflow-Enabled Content

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.

If you have privileges to view the contents of a folder that is assigned a workflow, you can view the files while they are in a workflow, showing the pending changes.

To work with files in workflow, see the "Working with Workflow-Enabled Content" chapter in *Building Portals with Oracle WebCenter Portal*.

Collaborating on Documents

This chapter describes different ways to collaborate on documents, both during the development of a document, or when a document is available to all users of a portal. This includes joint authoring, sharing, reviewing, approving, editing, and so on.

This chapter includes the following topics:

- [Section 20.1, "Collaborating on Documents Using the Documents Page and Documents Viewers"](#)
- [Section 20.2, "Collaborating on Documents through Workflows"](#)
- [Section 20.3, "Collaborating on Documents Using Oracle AutoVue"](#)

Permissions: To perform the tasks in this chapter, you need the portal-level permissions `Customize Pages` and `Edit Content and Create Documents` (which includes delete permissions on documents that you create), granted by the portal moderator. To delete documents that are not your own, you must have `Delete Documents` permission.

To set security on a document, you must have `Documents: Administration` permission, granted by the portal moderator.

Note: The **Documents** page in a portal is only shown with Content Server 11g. If the connected content repository is Content Server 10g, the **Documents** page will not be available; to use Documents functionality, you can create a page in a portal and add Documents viewers to the page.

20.1 Collaborating on Documents Using the Documents Page and Documents Viewers

The Documents page and Documents viewers provide features for accessing, adding, and managing folders and files; configuring and viewing file and folder properties; and searching file and folder content in the connected content repositories.

The following features enable you to collaborate on documents:

- Viewing a document in-place. See [Section 19.6.2, "Opening a File."](#)
- Tagging a document. See [Section 19.15, "Managing Tags on Files."](#)
- Linking to supporting documents. See [Section 19.18, "Managing Document Links."](#)

- Viewing recommendations for similar documents. See [Section 19.19, "Viewing Document Recommendations."](#)
- Commenting on a document. See [Section 15.4, "Commenting on Items."](#)
- Sharing the link to a document. See [Section 19.21, "Sharing the URL for a Folder or File."](#)
- Subscribing to a document. See [Section 19.23, "Subscribing to a File."](#)
- Liking a document. See [Section 19.24, "Liking a File."](#)
- Adding a document to your list of favorites. See [Section 19.25, "Adding a Folder or File to Your Favorites."](#)
- Adding wiki documents to WebCenter Portal, allowing multiple users to collaborate to create content that is relevant, useful, and up-to-date. See [Chapter 17, "Working with Wikis."](#)
- Adding blogs to record experiences and opinions, and allowing multiple users to contribute through blog posts. See [Chapter 18, "Working with Blogs."](#)

20.2 Collaborating on Documents through Workflows

While a document is being developed, it must typically be reviewed and approved by a number of people. To assist in managing this process, WebCenter Portal provides a built-in workflow capability to move a document through required approvals by assigned approvers. This capability is available when the connected content repository is Content Server.

For information about viewing and participating in document workflows, see the "Working with Workflow-Enabled Content" chapter in *Building Portals with Oracle WebCenter Portal*.

20.3 Collaborating on Documents Using Oracle AutoVue

In addition to the wide range of functionality offered by WebCenter Portal to manage and collaborate on documents through workflows, wiki documents, and portals, you also have the option to use Oracle AutoVue.

Note: To enable Oracle AutoVue functionality, verify with your system administrator that the following requirements are 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*.
- The AutoVue VueLink Integration servlet must be mapped through the same OHS front-end that is configured for Content Server and WebCenter Portal. For more information, see the "Enabling the iFraming UI in WebCenter Portal" section in *Administering Oracle WebCenter Portal*.
- SSO should be set up between Content Server and the WebCenter Portal application to allow for single sign-off, and avoid unexpected reuse of Content Server sessions. See the "Configuring Single Sign-on" 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 "`createJCRCContentServerConnection`" and "`setJCRCContentServerConnection`" sections in *WebLogic Scripting Tool Command Reference*.

Oracle AutoVue, packaged separately from WebCenter Portal, integrates easily with a Content Server back-end repository to provide document review and collaboration features. AutoVue supports a wide range of file types, including Word, Excel, PDF, as well as 2D and 3D CAD file types. For more information about Oracle AutoVue, see the library of documents at

<http://www.oracle.com/us/products/applications/autoVue/index.html>.

To use Oracle AutoVue to review and collaborate on a file:

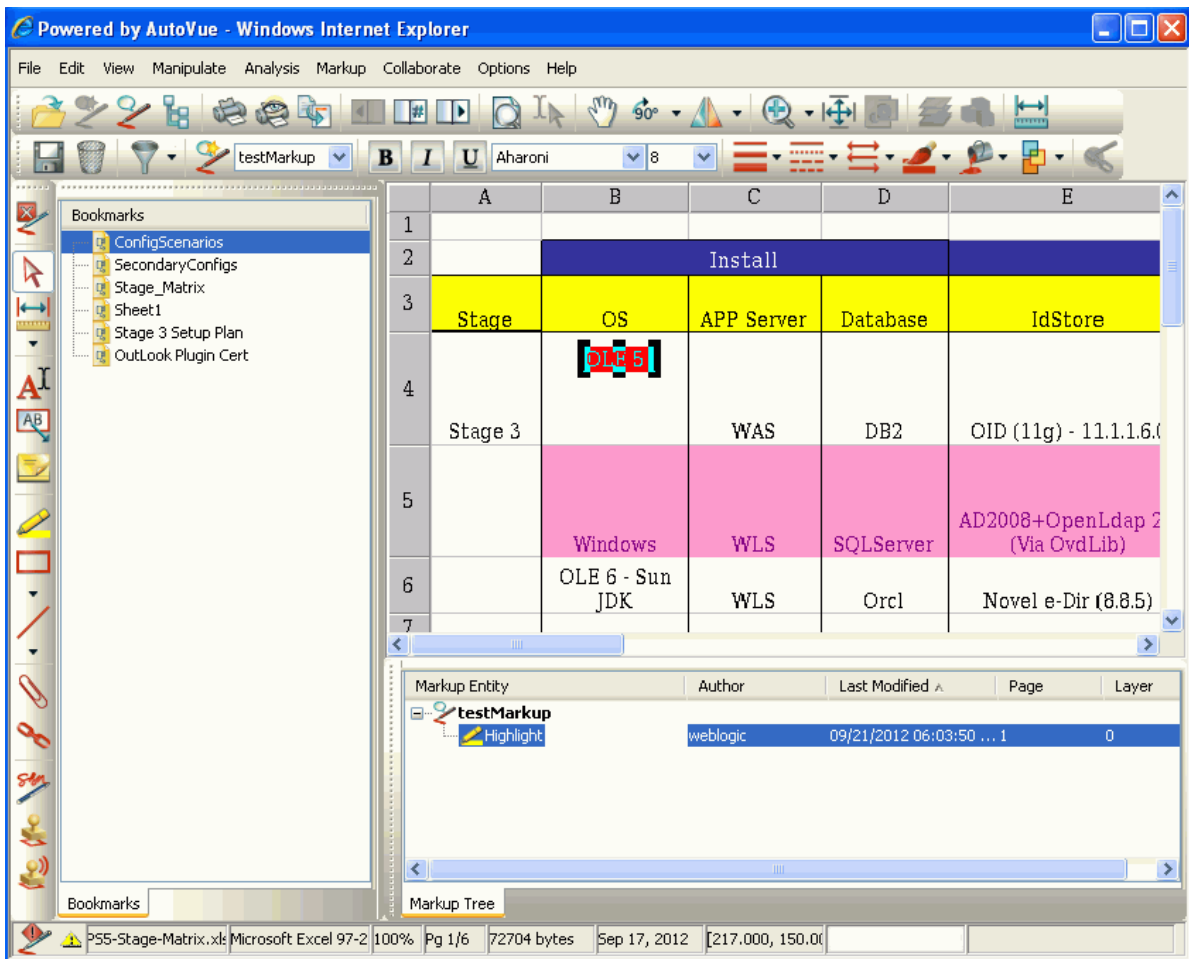
1. Open the file in the Document Viewer preview pane, click the **File** menu, and select **Annotate with AutoVue**.

The AutoVue file viewer in Content Server opens.

Note: if SSO is not set up, you will need to log into Content Server to see the AutoVue viewer.

2. In the AutoVue file viewer ([Figure 20-1](#)), enter comments and individualized mark-up, and save your changes.

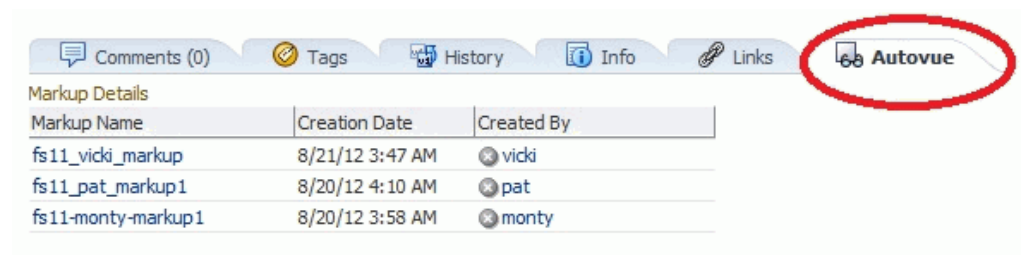
Figure 20–1 AutoView File Viewer in Content Server



- To view the file containing the AutoVue markup in WebCenter Portal, click the **AutoVue** tab at the bottom of the Document Viewer preview pane (Figure 20–2), then click the name of the AutoVue version of the file.

Note: There may be multiple marked-up versions of the file listed in the **AutoVue** pane. Click the version you require.

Figure 20–2 Document Viewer: AutoVue Pane



Working with Microsoft Office and Explorer Integration

This chapter describes how to use Microsoft Office applications and Windows Explorer to manage documents in a portal.

This chapter includes the following topics:

- [Section 21.1, "About Microsoft Office and Explorer Integration"](#)
- [Section 21.2, "Configuring Microsoft Office Integration with WebCenter Portal"](#)
- [Section 21.3, "Working with Microsoft Word, PowerPoint, and Excel Integration"](#)
- [Section 21.4, "Working with Microsoft Windows Explorer Integration"](#)

Permissions: To perform the tasks in this chapter, you need the portal-level permission `Create Documents` (which includes delete permissions on documents that you create). To delete documents that are not your own, you must have `Delete Documents` permission. These permissions are granted by default to the portal `Participant` role.

21.1 About Microsoft Office and Explorer Integration

WebCenter Portal integrates with Microsoft Office and Windows Explorer to provide you with flexibility in managing files in a portal when the content repository is Content Server.

The differences in Microsoft Office 2003, 2007, and 2010 mean that each version may support a particular feature in a different way, and one or more versions may not support some of the tasks described in this chapter. Each section in this chapter provides information about which Microsoft Office version supports the task described, and how that support is implemented, where there are differences. Additionally, [Table 21–1](#) provides a quick reference summary of the Microsoft Office functionality supported by WebCenter Portal in the different versions of Microsoft Office

The following sections provide an overview of the added functionality provided by integration with Microsoft Office and Windows Explorer:

- [Section 21.1.1, "Understanding Microsoft Office Word, PowerPoint, and Excel Integration"](#)
- [Section 21.1.2, "Understanding Microsoft Windows Explorer Integration"](#)

21.1.1 Understanding Microsoft Office Word, PowerPoint, and Excel Integration

Using the Microsoft Office shared document management functionality, you can work with Word, PowerPoint, or Excel files in any portal, including the Home portal, from the task pane in the Office application.

Note: The differences in Microsoft Office 2003, 2007, and 2010 mean that each version may support a particular feature in a different way, and one or more versions may not support some of the tasks described in this chapter. Each section provides information about which version supports the task described, and how that support is implemented, where there are differences.

Table 21–1 provides a quick reference summary of the Microsoft Office functionality supported by WebCenter Portal in Microsoft Office 2003, 2007, and 2010.

Note: The following browsers are supported for all versions of Microsoft Office:

- Internet Explorer 7+
 - Firefox 3.6+
 - Safari 4+
 - Google Chrome 12+
-

Table 21–1 Microsoft Office Version Support Summary













Task	2003	2007	2010
Creating a Portal from a Microsoft Office Document			
Opening a Microsoft Word, Excel, or PowerPoint file from WebCenter Portal: <ul style="list-style-type: none"> ■ Opening and Editing a File 2003: By default, opens task pane (Figure 21–7) 2007: By default, does not open task pane 2010: Does not include task pane ■ Opening a File Already Checked Out By Another User 			
Closing a File <ul style="list-style-type: none"> ■ Closing a File After Checking It In ■ Closing a File Before Checking It In 2003: From the File menu, select Close 2007: Click the Office Button (Figure 21–1) in the top left corner of the Microsoft Office application, then select Close <ul style="list-style-type: none"> ■ Closing an Unchanged File ■ Closing an Updated File 			
Working with the Microsoft Office Task Pane (2003 and 2007 only)			

Table 21-1 (Cont.) Microsoft Office Version Support Summary

Task	2003	2007	2010
<p>Displaying and Hiding the Microsoft Office Task Pane:</p> <ul style="list-style-type: none"> <p>Displaying or Hiding the Task Pane Manually 2003: From Tools menu, select Shared Workspace (Figure 21-7) 2007: Click Office button: from Server menu, select Document Management Information (Figure 21-10)</p> <p>Displaying or Hiding the Task Pane By Default 2003: From Tools menu, select Options 2007: In Microsoft Office task pane, click Options</p> 	✓	✓	N/A
<p>Microsoft Office Task Pane: Top section</p> 	✓	✓	N/A
<p>User or portal name (see Table 21-3)</p>	✓	✓	N/A
<ul style="list-style-type: none"> Open Site in Browser (see Table 21-3) 	✓	✓	N/A
<ul style="list-style-type: none"> Change Site Title 	✗	✗	N/A
<ul style="list-style-type: none"> Change Site Settings (see Table 21-3) 	✓	✓	N/A
<ul style="list-style-type: none"> Disconnect from Workspace 	✗	✗	N/A
<ul style="list-style-type: none"> Delete Workspace 	✗	✗	N/A
<p>Microsoft Office Task Pane: Status section</p> 	✓	✓	N/A

Table 21-1 (Cont.) Microsoft Office Version Support Summary

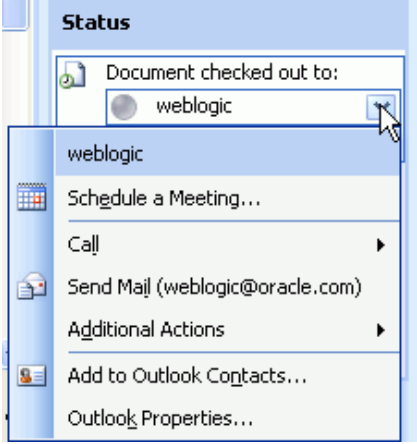
Task	2003	2007	2010
Document checked out to: <i>user name</i> 	✓	✓	N/A
<ul style="list-style-type: none"> Schedule a Meeting (see Table 21-3) 	✓	✓	N/A
<ul style="list-style-type: none"> Call 	✗	✗	N/A
Send Mail <ul style="list-style-type: none"> Sending a Message to the Current User Sending a Message to Your Connections Sending a Message to Members of a Portal 	✓	✓	N/A
<ul style="list-style-type: none"> Additional Actions 	✗	✗	N/A
<ul style="list-style-type: none"> Add to Outlook Contacts (see Table 21-3) 	✓	✓	N/A
<ul style="list-style-type: none"> Outlook Properties (see Table 21-3) 	✓	✓	N/A
Check in <ul style="list-style-type: none"> Checking a File In Checking the Currently Open File Out Again After Checking It In Checking a File Out 	✓	✓	N/A

Table 21-1 (Cont.) Microsoft Office Version Support Summary

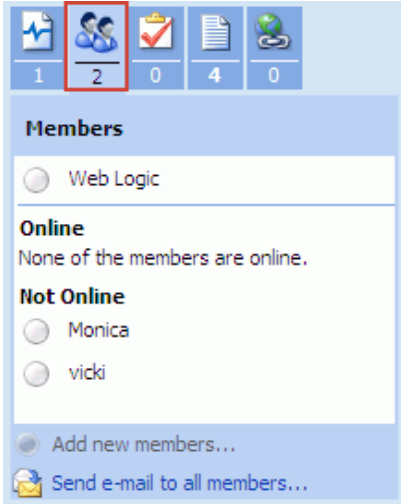
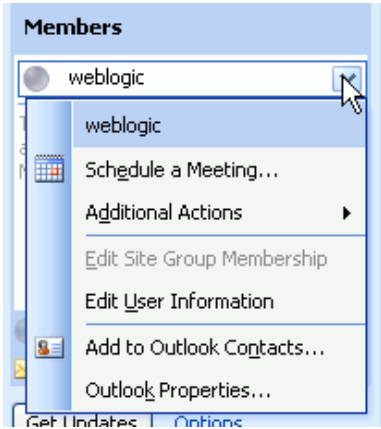
Task	2003	2007	2010
<p>Microsoft Office Task Pane: Members section</p> 	✓	✓	N/A
<p><i>User who checked out the file</i></p> 	✓	✓	N/A
<ul style="list-style-type: none"> ■ Schedule a Meeting 	✗	✗	N/A
<ul style="list-style-type: none"> ■ Additional Actions 	✗	✗	N/A
<ul style="list-style-type: none"> ■ Edit Site Group Membership 	✗	✗	N/A
<ul style="list-style-type: none"> ■ Edit User Information 	✗	✗	N/A
<ul style="list-style-type: none"> ■ Add to Outlook Contacts 	✗	✗	N/A
<ul style="list-style-type: none"> ■ Outlook Properties 	✗	✗	N/A
<p><i>Listing of current people connections</i></p>	✓	✓	N/A
<p>Add new members (not supported for Home portal)</p> <ul style="list-style-type: none"> ■ Adding Members to a Portal 	✓	✓	N/A
<p>Send e-mail to all members</p> <ul style="list-style-type: none"> ■ Sending a Message 	✓	✓	N/A

Table 21-1 (Cont.) Microsoft Office Version Support Summary

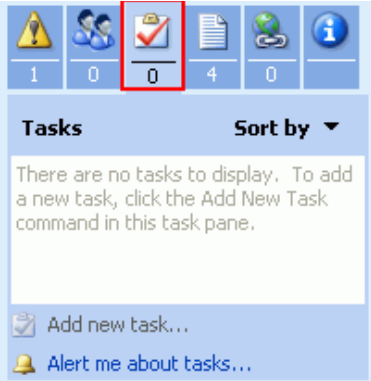


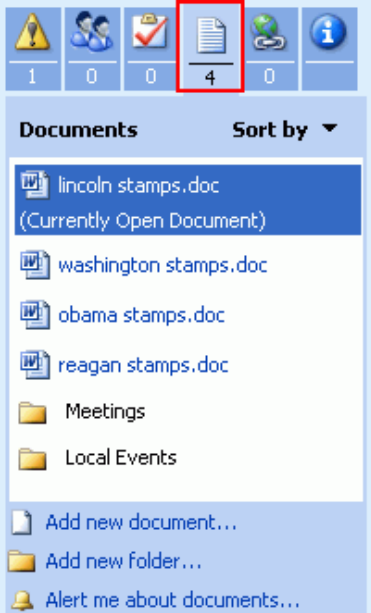


Task	2003	2007	2010
<p>Microsoft Office Task Pane: Tasks section</p> 			N/A
<p>Microsoft Office Task Pane: Documents section</p> 			N/A

Table 21-1 (Cont.) Microsoft Office Version Support Summary

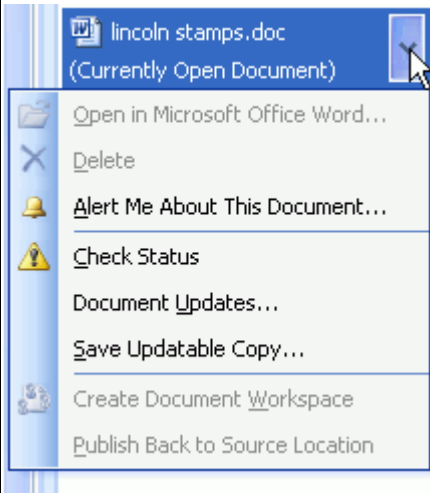
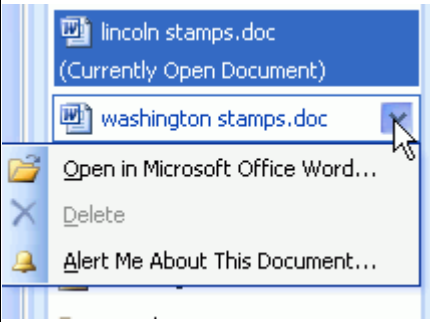
Task	2003	2007	2010
<i>Managing the Currently Open File</i>			
			
<ul style="list-style-type: none"> ■ Open in Microsoft Office Xxxxx 	-	-	N/A
<ul style="list-style-type: none"> ■ Delete 	-	-	N/A
<ul style="list-style-type: none"> ■ Alert Me About This Document 	-	-	N/A
<ul style="list-style-type: none"> ■ Check Status (see Table 21-3) 	✓	✓	N/A
<ul style="list-style-type: none"> ■ Document Updates 	-	-	N/A
<ul style="list-style-type: none"> ■ Save Updatable Copy 	-	-	N/A
<ul style="list-style-type: none"> ■ Create Document Workspace 	-	-	N/A
<ul style="list-style-type: none"> ■ Publish Back to Source Location 	-	-	N/A
<i>Managing Other Files in the Current Portal</i>			
			
<ul style="list-style-type: none"> ■ Open in Microsoft Office 	✓	✓	N/A
<ul style="list-style-type: none"> ■ Delete 	-	-	N/A
<ul style="list-style-type: none"> ■ Alert Me About This Document 	-	-	N/A

Table 21-1 (Cont.) Microsoft Office Version Support Summary

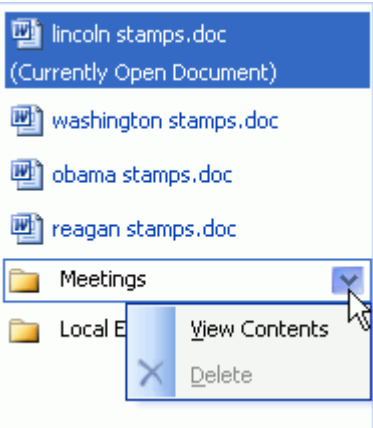
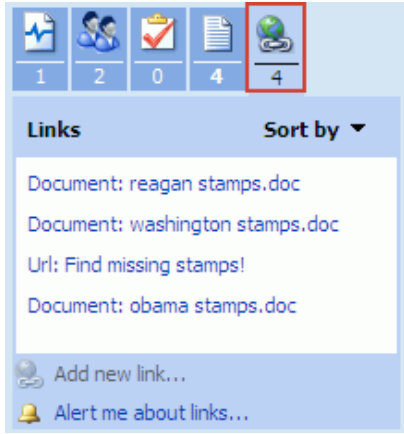
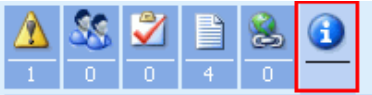
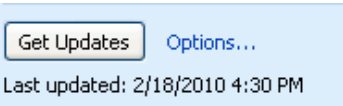
Task	2003	2007	2010
<p><i>Managing Folders:</i></p> 			
<ul style="list-style-type: none"> View Contents. 	✔	✔	N/A
<ul style="list-style-type: none"> Delete 	✘	✘	N/A
<p>Add new document</p> <ul style="list-style-type: none"> Saving a File As a New File in a Portal Adding a New File Using the Task Pane 	✔	✔	N/A
<p>Add new folder</p> <ul style="list-style-type: none"> Adding a New Folder 	✔	✔	N/A
<p>Alert me about documents</p>	✘	✘	N/A
<p>Microsoft Office Task Pane: Links section</p> 	✔	✔	N/A
<p>Documents and URL links defined in WebCenter Portal to the current file</p> <ul style="list-style-type: none"> Viewing Link Targets 	✔	✔	N/A
<p>Add new link</p>	✘	✘	N/A
<p>Alert me about links</p>	✘	✘	N/A

Table 21–1 (Cont.) Microsoft Office Version Support Summary

Task	2003	2007	2010
Microsoft Office Task Pane: Document Information section  Document Information Modified By weblogic Modified 2/17/2010 12:36 PM Restrict permission... Alert me about this document... Check in... Version history...	✓	✗	N/A
Document Information	✓	✗	N/A
<ul style="list-style-type: none"> ■ Viewing Document Information 	✓	✗	N/A
Restrict permission	✗	✗	N/A
Alert me about this document	✗	✗	N/A
Check out or Check in	✓	✗	N/A
<ul style="list-style-type: none"> ■ Checking a File Out ■ Checking a File In 	✓	✗	N/A
Version history	✓	✗	N/A
<ul style="list-style-type: none"> ■ Working with File Version History 	✓	✗	N/A
Microsoft Office Task Pane: Bottom section 	✓	✓	N/A
Get Updates (see Table 21–3)	✓	✓	N/A
Options (see Table 21–3)	✓	✓	N/A
<i>Date and time that the file was last modified.</i>	✓	✓	N/A

21.1.2 Understanding Microsoft Windows Explorer Integration

In Windows Explorer, you can manage the folders and files in a portal when the back-end content repository is Content Server. To use this functionality, you create a network place in Windows Explorer for the portal documents. See [Section 21.4, "Working with Microsoft Windows Explorer Integration."](#)

21.2 Configuring Microsoft Office Integration with WebCenter Portal

To allow for full integration of Microsoft Office with WebCenter Portal, your system administrator must complete the steps detailed in the "Managing Microsoft Office Integration" chapter in *Administering Oracle WebCenter Portal*.

Additionally, it is recommended that you set your Microsoft Office application options to use a web server (Content Server) for managing checked out files rather than a local draft folder. Table 21–2 describes the behavior of save and close actions when using a local draft folder and a web server:

Table 21–2 Microsoft Office Save Options Settings

MS Office Action	Save to Local Draft Folder	Save to Web Server
Save a file	The file is saved to the client local drive. This is useful when the client does not maintain a connection to a server. The file is not automatically checked-in when the connection to the server is established. You will need to check in the file as a separate operation (see Section 21.3.4.4, "Checking a File In").	The file is sent to the server and saved to a temporary file. The temporary file is used to check in of the new updated version of the file.
Close a file or exit application (see Section 21.3.5.2.2, "Closing an Updated File").	If the file is checked out, MS Office prompts for check-in. If you select No to the check-in prompt, MS Office exits and the file remains checked out and locked to changes by other users. Any changes made to the file are not saved. To later cancel the checked out status, see Section 19.8.2, "Cancelling a Checked Out Status."	If the file is checked out, MS Office prompts for checkin. If you select No to the checkin prompt, MS Office exits and cancels the checked out status of the file. Any changes made to the file are not saved.

To configure your Microsoft Office application options to follow the recommendation to use a web server (Content Server) for managing checked out files:

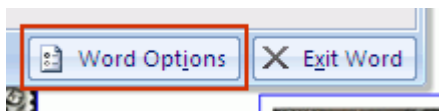
1. In the Microsoft Office document, click the Office Button (Figure 21–4) in the top left corner of the Microsoft Office application.

Figure 21–1 Office Button in Microsoft Office



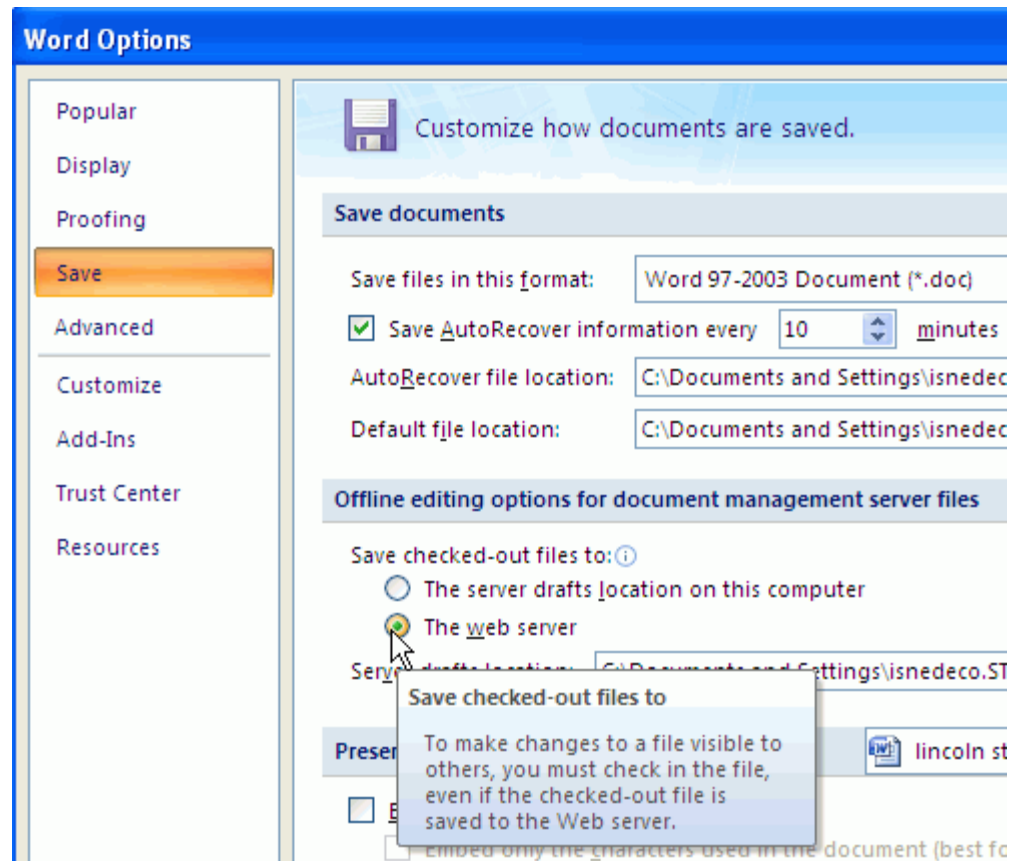
2. Click **Application Options** (for example, **Word Options**, as shown in Figure 21–2) at the bottom of the menu.

Figure 21–2 Office Button Menu: Word Options



3. In the Options dialog, select **Save** in the left pane (Figure 21–3).
4. Under **Offline editing options for document management server files**, select **The web server** (Figure 21–3).

Figure 21–3 Word Options Dialog



21.3 Working with Microsoft Word, PowerPoint, and Excel Integration

WebCenter Portal integrates with the Microsoft Office shared document management functionality for working with Microsoft Word, Excel, or PowerPoint files. For more information, see [Section 21.1.1, "Understanding Microsoft Office Word, PowerPoint, and Excel Integration."](#)

Many of the tasks you can perform using the Microsoft Office shared document management functionality can also be performed in WebCenter Portal, as described in [Chapter 19, "Creating and Managing Documents."](#)

This section provides steps to perform the following tasks using Microsoft Office shared document management:

- [Section 21.3.1, "Creating a Portal from a Microsoft Office Document"](#)
- [Section 21.3.2, "Opening and Editing a File"](#)
- [Section 21.3.3, "Displaying and Hiding the Microsoft Office Task Pane"](#)
- [Section 21.3.4, "Working with the Microsoft Office Task Pane"](#)
 - [Section 21.3.4.1, "Adding a File"](#)
 - [Section 21.3.4.2, "Adding a New Folder"](#)
 - [Section 21.3.4.3, "Checking a File Out"](#)
 - [Section 21.3.4.4, "Checking a File In"](#)
 - [Section 21.3.4.5, "Managing the Currently Open File"](#)

- [Section 21.3.4.6, "Managing Other Files in the Current Portal"](#)
- [Section 21.3.4.7, "Managing Folders"](#)
- [Section 21.3.4.8, "Viewing Link Targets"](#)
- [Section 21.3.4.9, "Viewing Document Information"](#)
- [Section 21.3.4.10, "Working with File Version History"](#)
- [Section 21.3.4.11, "Adding Members to a Portal"](#)
- [Section 21.3.4.12, "Sending a Message"](#)
- [Section 21.3.5, "Closing a File"](#)

Note: WebCenter Portal does not implement administrative features of the Microsoft Office shared document management functionality, such as creating a workspace using the task pane, deleting a workspace, or changing a workspace title.

21.3.1 Creating a Portal from a Microsoft Office Document

Note: This feature is available only in Microsoft Office 2007. It is not available in Microsoft Office 2003 or 2010.

With Microsoft Office 2007, you can create a portal from a Microsoft Office document, as long as your permissions on the document are the same as your permissions in WebCenter Portal.

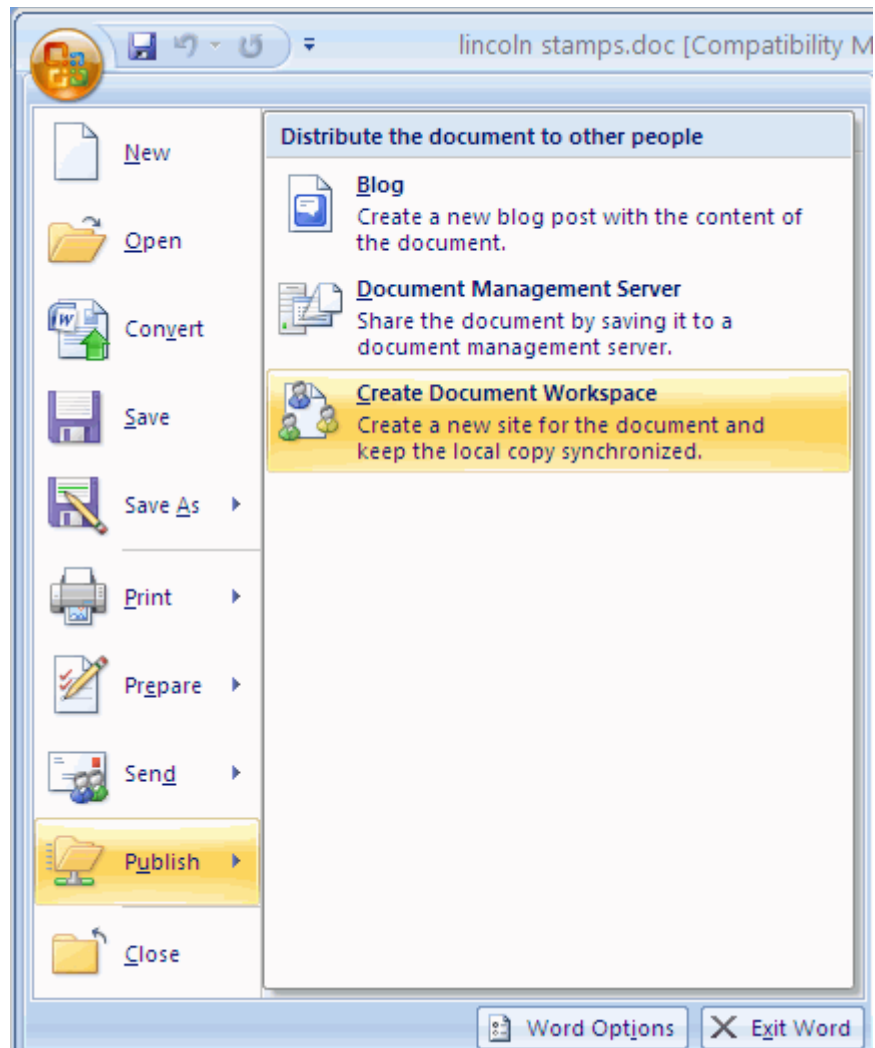
To create a portal from a Microsoft Office document:

1. In the Microsoft Office document, click the Office Button ([Figure 21–4](#)) in the top left corner of the Microsoft Office application.

Figure 21–4 Office Button in Microsoft Office

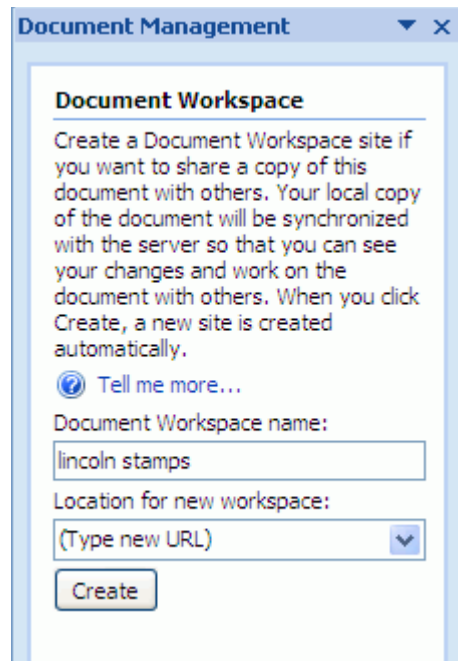


2. From the **Publish** menu, select **Create Document Workspace** ([Figure 21–5](#)).

Figure 21–5 Creating a Portal from an Office Document

3. The Microsoft Office application displays the **Document Management** task pane, displaying the file name as the default workspace name.

Note: If the pane does not display, see [Section 21.3.3, "Displaying and Hiding the Microsoft Office Task Pane."](#)

Figure 21–6 Document Management Task Pane: Document Workspace

4. In the **Document Workspace name** field, type a name for the portal if you want to change the default name.
5. In the **Location for new workspace** field, type the Explorer URL for the WebCenter Portal instance.

`http://hostname:port/wcsdocs/conn/repository_server/spaces/`

For example:

`http://myserver:8888/wcsdocs/conn/myserver-ucm/spaces/`

Tip: The host name and port is shown in the browser URL for your WebCenter Portal application.

To find the name of the repository server:

- On the **Documents** page of the portal you want to connect to, or the Home portal, from the **View** menu, select **Containing Folder Info**.
- Use the portion of the **Identifier** value that precedes the pound (#) sign as the repository server value. For example, if the **Identifier** value is `myserver-ucm#dCollectionID:549132825864000605`, then the repository server value is `myserver-ucm`.

6. Click **Create**.
7. At the prompt, enter your WebCenter Portal login credentials.

WebCenter Portal creates the new portal in WebCenter Portal.

In Microsoft Office, the **Status** section of the Microsoft Office task pane (see [Table 21–3](#)) displays one of the following status messages:

This document is up to date. If you have unsaved changes, you must save the document before you can update the workspace copy.

A copy of this document is stored in a Document Workspace. Changes made to your document have not been updated in the workspace copy.

If you update the document in Microsoft Office, you can simply click the **Update Workspace Copy** link to synchronize the document with the version in the portal (on the server).

21.3.2 Opening and Editing a File

When you open a Microsoft Office file from WebCenter Portal (using any browser), the file is automatically checked out of the Content Server repository. When you refresh the page in WebCenter Portal, the **Status** column for the file shows a **Checked Out** icon.

To make your changes available to other users, you can save and close it in Microsoft Office, or explicitly check the file in using Microsoft Office.

Note: For all browsers except Internet Explorer, you will need to install the Java plugin available at <http://support.mozilla.com> to edit a Microsoft Office file. This plugin is included in Java 6 Update 15 and above.

To open a Microsoft Word, Excel, or PowerPoint file from WebCenter Portal in-place in its Microsoft Office application:

1. On the **Documents** page, or in the Document Explorer, Document Manager, or Folder Viewer on a page, click in the row of the file you want to edit, but not on the file name. (Clicking on the file name opens the document in the Document Viewer).

Alternatively, you can edit an open file in the Document Viewer preview pane.

2. Depending on your view and the file type, perform one of the following actions:
 - On the **Documents** page, or in the Document Explorer, Document Manager, or Folder Viewer on a page, from the **File** menu or the context (right-click) menu, select the **Edit** action that opens the file in-place in its Microsoft Office application. For example, for Microsoft Word files, select **Edit with Word**.
 - In the Document Viewer preview pane, click the **Edit** action.

Note: If the file is already checked out by another user, the File in Use dialog opens. See [Section 19.8.4.1, "Opening a File Already Checked Out By Another User."](#)

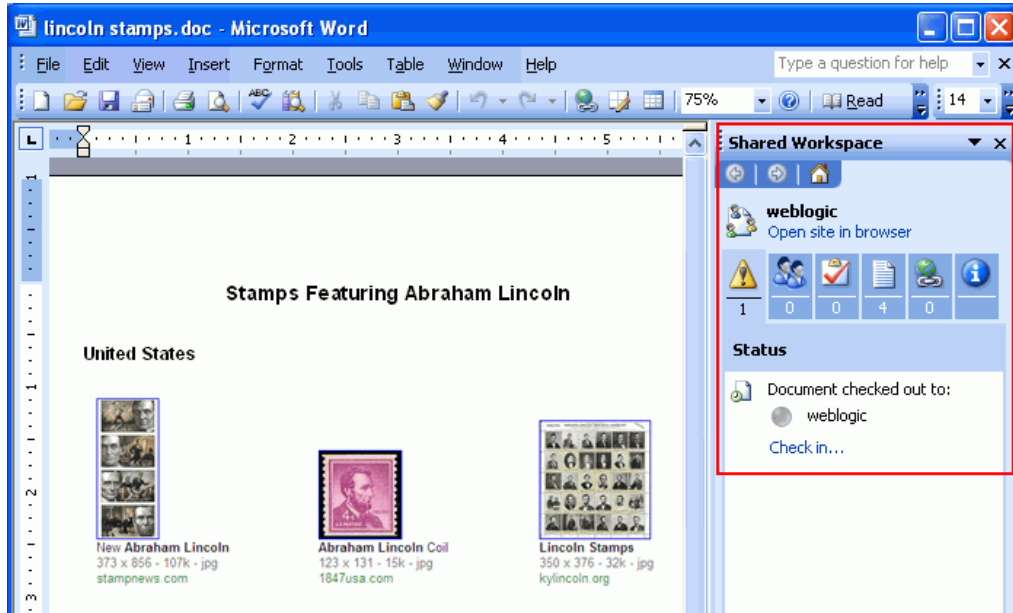
3. If prompted, enter the same credentials used to log in to WebCenter Portal to open the file in-place in its corresponding application.

Note: The user name and password must contain only ASCII characters. A user name or password containing multi-byte characters cannot be successfully authenticated.

- *In Microsoft Office 2003.* The Microsoft Office application displays a **Shared Workspace** task pane by default ([Figure 21-7](#)).

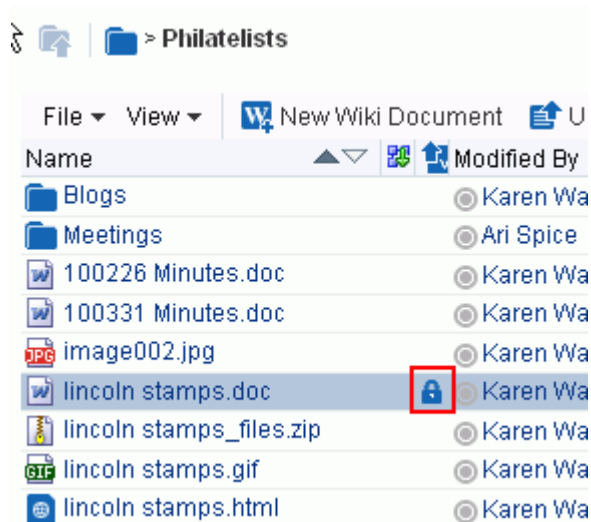
- *In Microsoft Office 2007.* The Microsoft Office application displays no task pane by default. To display the **Document Management** task pane, see [Section 21.3.3, "Displaying and Hiding the Microsoft Office Task Pane."](#)

Figure 21–7 Microsoft Office 2003 Shared Workspace Task Pane



- When the file opens, it is automatically checked out of the Content Server repository, indicated by the **Checked Out** icon next to the file name.

Figure 21–8 Checked Out Icon



- Make required updates, then save and close the file. The modified file is automatically checked back in.

21.3.3 Displaying and Hiding the Microsoft Office Task Pane

Note: The Microsoft Office task pane is available only in Microsoft Office 2003 and 2007. Microsoft Office 2010 does not include a task pane.

In Microsoft Office 2003, the task pane displays by default when you open a file, whereas in Microsoft Office 2007, the task pane does not display by default.

You can manage the display of the Microsoft Office task pane as described in the following sections:

- [Section 21.3.3.1, "Displaying or Hiding the Task Pane Manually"](#)
- [Section 21.3.3.2, "Displaying or Hiding the Task Pane By Default"](#)

21.3.3.1 Displaying or Hiding the Task Pane Manually

To display or hide the Microsoft Office task pane manually:

In Microsoft Office 2003:

- From the **Tools** menu, select **Shared Workspace** to toggle between displaying and hiding the task pane.

In Microsoft Office 2007:

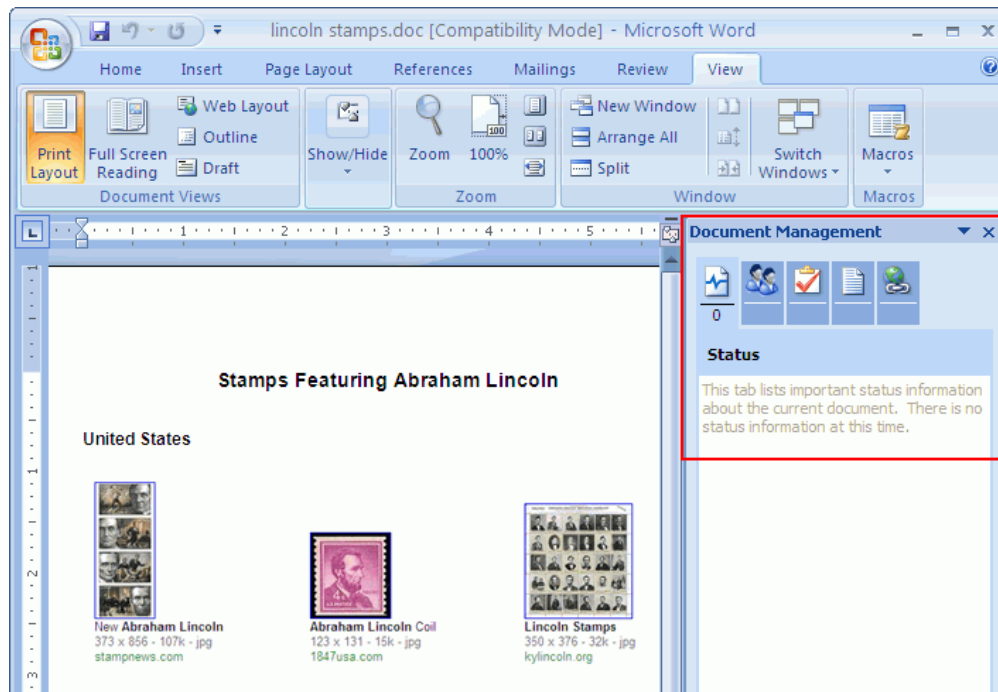
1. Click the Office Button ([Figure 21–9](#)) in the top left corner of the Microsoft Office application.

Figure 21–9 Office Button in Microsoft Office



2. From the **Server** menu, select **Document Management Information** to toggle between displaying and hiding the **Document Management** task pane ([Figure 21–10](#)).

Figure 21–10 Microsoft Office 2007 Document Management Task Pane



21.3.3.2 Displaying or Hiding the Task Pane By Default

To display or hide the Microsoft Office task pane automatically by default every time you open a Microsoft Word, Excel, or PowerPoint file:

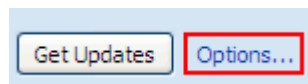
In Microsoft Office 2003:

1. From the **Tools** menu, select **Options**.
2. In the Options dialog, on the **General** tab, click **Service Options**.
3. In the **Shared Workspace** category, select or deselect the check box **The document is part of a workspace or SharePoint site** to respectively display or hide the task pane by default.

In Microsoft Office 2007:

1. At the bottom of the Microsoft Office task pane, click **Options** (Figure 21–11).

Figure 21–11 Options Link in Task Pane (Microsoft Office 2007)



2. In the Service Options dialog, select or deselect the check box **The document is part of a workspace or SharePoint site** to respectively display or hide the task pane by default.

21.3.4 Working with the Microsoft Office Task Pane

Note: The Microsoft Office task pane is available only in Microsoft Office 2003 and 2007. Microsoft Office 2010 does not include a task pane.

The Microsoft Office task pane provides information pertaining to the currently open file and access to tasks for all folders and files in the current portal, as described in Table 21-3.

Table 21-3 Microsoft Office Task Pane for Files in a Portal

Task Pane Area	Description
Top section in Microsoft Office 2003:	<p>For a file in the Home portal:</p> <ul style="list-style-type: none"> Shows the user name. Open site in browser. Click to display the WebCenter Portal Home page. <p>For a file in a portal:</p> <ul style="list-style-type: none"> Shows the portal name. Open site in browser. Click to display the portal Home page.
Top section in Microsoft Office 2007:	<p>Additionally, the top section provides a drop-down menu of actions available for the user or portal:</p> <ul style="list-style-type: none"> Open Site in Browser. See above. Change Site Title. Not supported. Change Site Settings. For the Home portal, displays the WebCenter Portal Home page; for a portal, displays the Settings tab of the portal. Disconnect from Workspace. Not supported. Delete Workspace. Not supported.
Dropdown menu:	

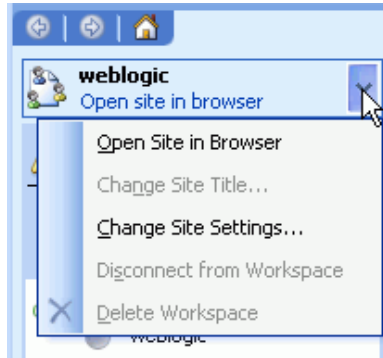
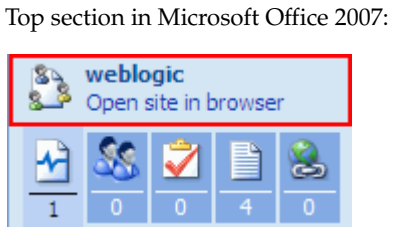


Table 21–3 (Cont.) Microsoft Office Task Pane for Files in a Portal

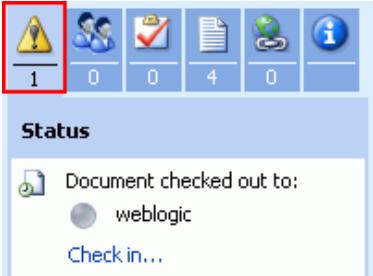
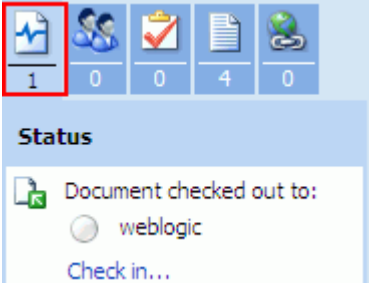
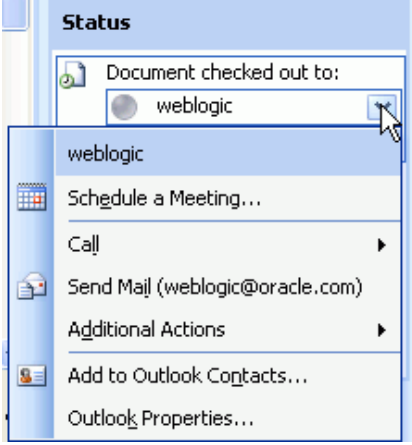
Task Pane Area	Description
<p>Status section in Microsoft Office 2003:</p> 	<p>Displays information only if the file is checked out.</p> <p>Shows the following information:</p> <ul style="list-style-type: none"> The user who checked out the file. Check in link. See Section 21.3.4.4, "Checking a File In." <p>After checking a file in, you can subsequently check the file out again. See Section 21.3.4.3, "Checking a File Out."</p> <p>Additionally, the Status section provides a dropdown menu of actions available for the user:</p>
<p>Status section in Microsoft Office 2007:</p> 	<ul style="list-style-type: none"> Schedule a Meeting. Opens the Microsoft Outlook calendar scheduler. Call. Not supported. Send Mail. Opens a Microsoft Outlook message with the To field populated with the mail address that is specified for the user in WebCenter Portal. See Section 21.3.4.12, "Sending a Message." This selection has the same effect as clicking the user name in the Members section. Additional Actions. Not supported. Add to Outlook Contacts. Opens the Microsoft Outlook Contacts page populated with contact information for the user.
<p>Dropdown menu:</p> 	<ul style="list-style-type: none"> Outlook Properties. Opens the Microsoft Outlook E-mail Properties dialog.

Table 21-3 (Cont.) Microsoft Office Task Pane for Files in a Portal

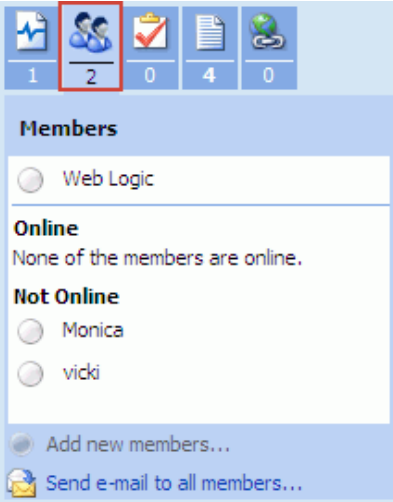
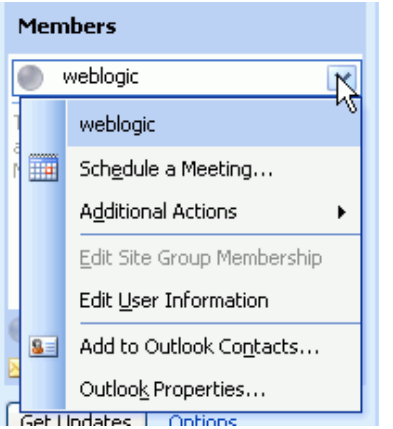
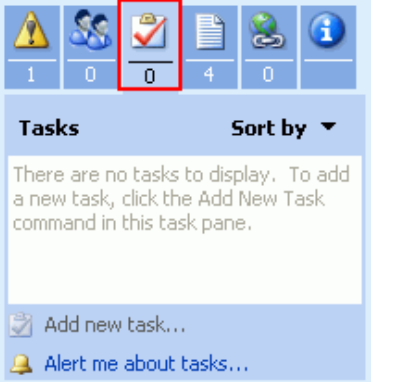
Task Pane Area	Description
<p>Members section:</p> 	<p>For a file in the Home portal:</p> <ul style="list-style-type: none"> ■ Lists the current people connections. ■ Add new members. Not supported for Home portal. ■ Send e-mail to all members. See Section 21.3.4.12, "Sending a Message." <p>For a file in a portal:</p> <ul style="list-style-type: none"> ■ Lists the user editing the file, followed by the user and group names of all portal members, up to the limit of 99 members. The distinction between Online and Not Online users is not supported; all portal members show in the list as Not Online. ■ Add new members. See Section 21.3.4.11, "Adding Members to a Portal." ■ Send e-mail to all members. See Section 21.3.4.12, "Sending a Message."
<p>Dropdown menu:</p> 	<p>Additionally, the Members section provides a dropdown menu of actions available for the listed member(s). The actions in this menu are not supported.</p> <p>To send a message to any member, simply click the member's user name to open a Microsoft Outlook window with the To field populated with the mail address that is specified for the member in WebCenter Portal.</p>
<p>Tasks section:</p> 	<p>Not supported.</p>

Table 21–3 (Cont.) Microsoft Office Task Pane for Files in a Portal

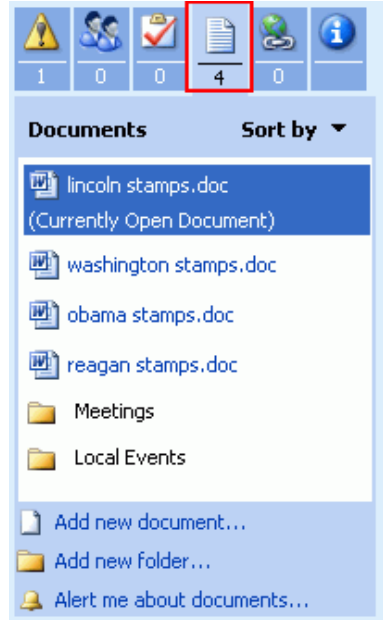
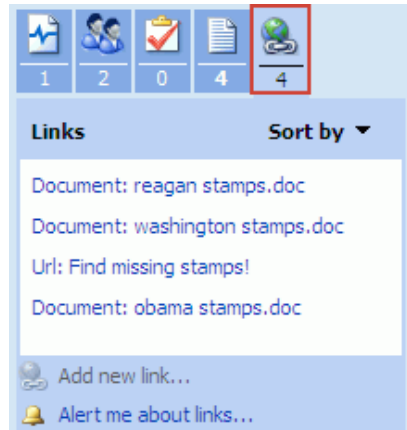
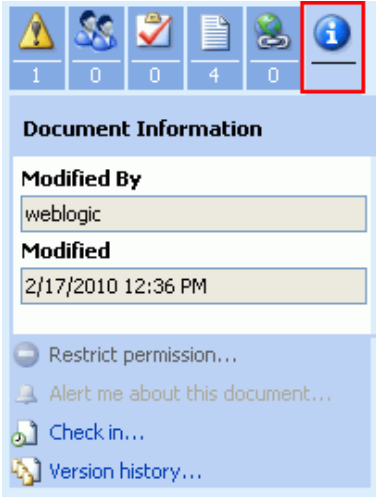
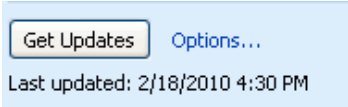
Task Pane Area	Description
<p>Documents section:</p> 	<p>Provides access to other files in the current portal directly from Microsoft Office.</p> <p>Sort by. Select from the menu to sort the list of documents by Creation Date, Modified Date, File Name, File Type, Ascending, or Descending.</p> <ul style="list-style-type: none"> ■ Shows all folders and files in the folder where the open file resides. See Section 21.3.4.6, "Managing Other Files in the Current Portal." <p>Note: Navigating upward in the folder hierarchy from the current document is not supported; you can drill down and then back up to the current level.</p> <ul style="list-style-type: none"> ■ Provides a menu of actions available on the currently open file. See Section 21.3.4.5, "Managing the Currently Open File." ■ Provides a menu of actions available on other documents in the list. See Section 21.3.4.6, "Managing Other Files in the Current Portal." ■ Provides a menu of actions for each folder listed. See Section 21.3.4.7, "Managing Folders." ■ Add new document. See Section 21.3.4.1, "Adding a File." ■ Add new folder. See Section 21.3.4.2, "Adding a New Folder." ■ Alert me about documents. Not supported.
<p>Links section:</p> 	<p>The Links section shows all document and URL links defined in WebCenter Portal to the currently open file.</p> <p>Sort by. Select from the menu to sort the list of links by Creation Date, Modified Date, URL, Ascending, or Descending.</p> <ul style="list-style-type: none"> ■ Lists all links for the currently open file. See Section 21.3.4.8, "Viewing Link Targets." Click a link to navigate to the linked object.

Table 21-3 (Cont.) Microsoft Office Task Pane for Files in a Portal

Task Pane Area	Description
<p>Document Information section (<i>Microsoft Office 2003 only</i>):</p> 	<p>Provides information about the currently open document:</p> <ul style="list-style-type: none"> ▪ Document Information. See Section 21.3.4.9, "Viewing Document Information." ▪ Restrict permission. Not supported. ▪ Alert me about this document. Not supported. ▪ Check out or Check in. See Section 21.3.4.3, "Checking a File Out." and Section 21.3.4.4, "Checking a File In." ▪ Version history. See Section 21.3.4.10, "Working with File Version History."
<p>Bottom section:</p> 	<p>Includes:</p> <ul style="list-style-type: none"> ▪ Get Updates. Refreshes the files and associated information from the WebCenter Portal server. ▪ Options. Opens the Service Options dialog. Refer to the Microsoft Office online help for more information. ▪ Shows the date and time that the file was last modified.

The following sections describe the tasks you can perform using the Microsoft Office task pane:

- [Section 21.3.4.1, "Adding a File"](#)
- [Section 21.3.4.2, "Adding a New Folder"](#)
- [Section 21.3.4.3, "Checking a File Out"](#)
- [Section 21.3.4.4, "Checking a File In"](#)
- [Section 21.3.4.5, "Managing the Currently Open File"](#)
- [Section 21.3.4.6, "Managing Other Files in the Current Portal"](#)
- [Section 21.3.4.7, "Managing Folders"](#)
- [Section 21.3.4.8, "Viewing Link Targets"](#)
- [Section 21.3.4.9, "Viewing Document Information"](#)
- [Section 21.3.4.10, "Working with File Version History"](#)
- [Section 21.3.4.11, "Adding Members to a Portal"](#)
- [Section 21.3.4.12, "Sending a Message"](#)

21.3.4.1 Adding a File

Using the Microsoft Office shared document management functionality, you can add a new file to the Content Server repository, exposing the file in a portal, as described in the following sections:

- [Section 21.3.4.1.1, "Saving a File As a New File in a Portal"](#) (Microsoft Word, Excel, or PowerPoint file only)
- [Section 21.3.4.1.2, "Adding a New File Using the Task Pane"](#) (files of any type)

Note: Other methods to add a file to the connected content repository are:

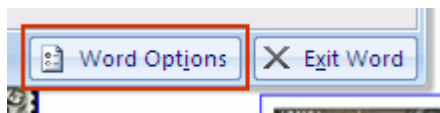
- Create a network place to a portal, then use Windows Explorer to add files of any type when the back-end content repository is Content Server, as described in [Section 21.4, "Working with Microsoft Windows Explorer Integration."](#)
 - In WebCenter Portal, copy and paste, upload, or create a file using the Rich Text Editor (RTE), as described in [Section 19.10, "Copying and Pasting Folders and Files,"](#) [Section 19.5.1, "Uploading Files,"](#) and [Section 19.8, "Editing or Updating a File."](#)
-

21.3.4.1.1 Saving a File As a New File in a Portal To save a local Microsoft Word, Excel, or PowerPoint file to a portal:

Note: This feature is supported in Microsoft Office 2003 and 2007 only.

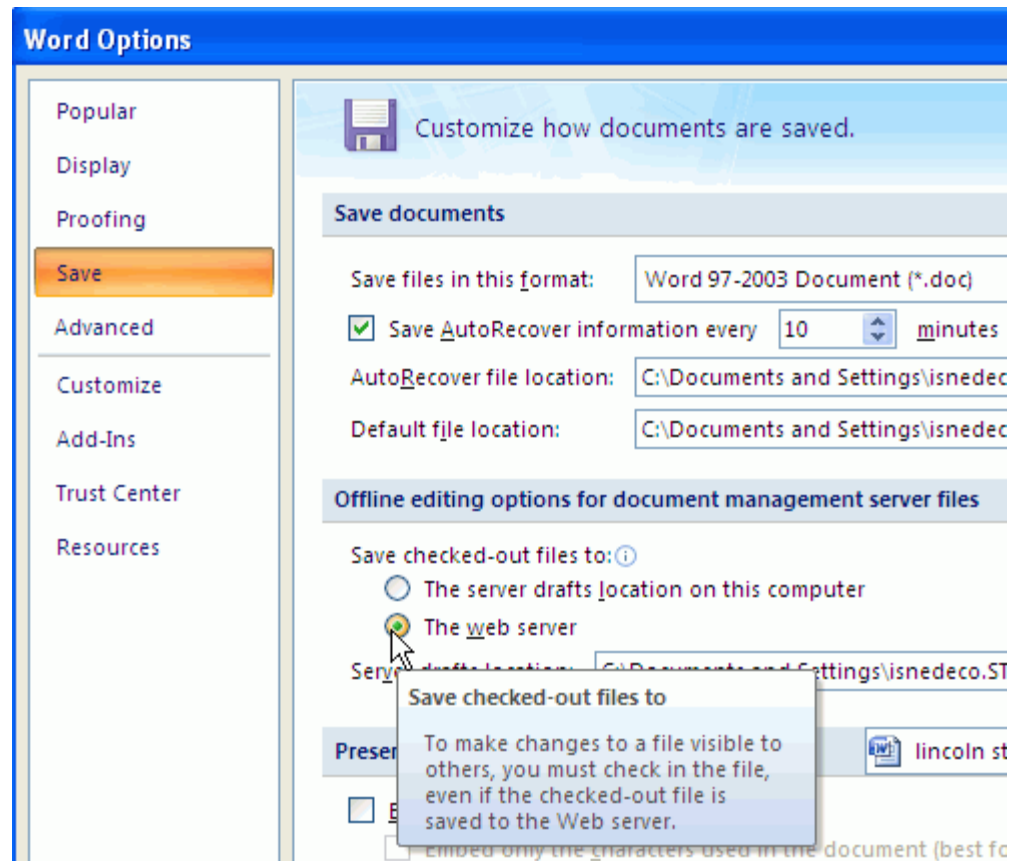
1. Add the portal as a new network place in Windows Explorer, as described in [Section 21.4, "Working with Microsoft Windows Explorer Integration."](#)
2. Open the file in its Microsoft Office application.
3. (*In Microsoft Office 2007 only*) Set save options for shared documents:
 - a. Click the Office Button in the top left corner of the Microsoft Office application, then click **Word Options** ([Figure 21–12](#)) at the bottom of the menu.

Figure 21–12 Office Button Menu: Word Options



- b. In the Word Options dialog, select **Save** in the left pane ([Figure 21–13](#)).
- c. Under **Offline editing options for document management server files**, select **The web server** ([Figure 21–13](#)).

Figure 21–13 Word Options Dialog



4. Publish the file to the portal:

In Microsoft Office 2003. From the **File** menu, select **Save As**.

In Microsoft Office 2007. Click the Office Button, then select either:

- **Publish**, then **Document Management Server**.
 - **Or, Save As**, then **Application Document**.
5. In the **Save As** dialog, select the portal network place, then click **Save**. For more information about portal network place URLs, see [Section 21.4.1, "Adding a Portal as a Network Place."](#)
 6. Enter login credentials for WebCenter Portal, then click **OK**.
 7. In WebCenter Portal, on the **Documents** page of the portal, click the **Refresh** icon to confirm that the file was added.

Note: To make the file visible to others, you must check the file in. See [Section 21.3.4.4, "Checking a File In."](#)

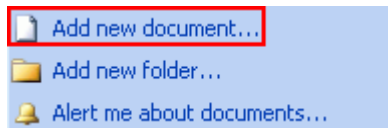
8. To display the Microsoft Office task pane in the open file, see [Section 21.3.3, "Displaying and Hiding the Microsoft Office Task Pane."](#)

21.3.4.1.2 Adding a New File Using the Task Pane To add a new file to a portal using the Microsoft Office task pane:

Note: This feature is available with Microsoft Office 2003 and 2007. Microsoft Office 2010 does not include a task pane.

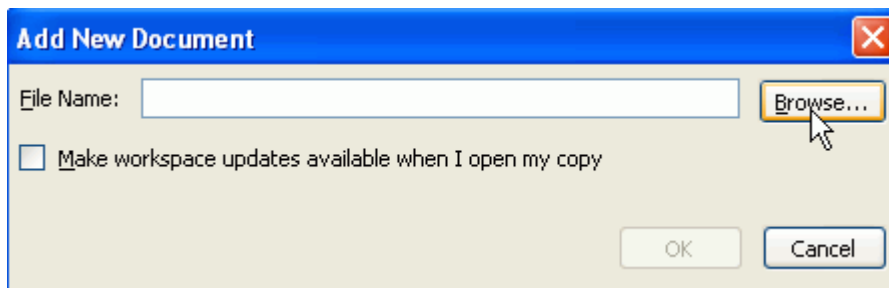
1. Open a Microsoft Word, Excel, or PowerPoint file to use the Microsoft Office shared document management functionality (see [Section 21.3.2, "Opening and Editing a File"](#)).
2. At the bottom of the **Documents** section of the task pane, click **Add new document** ([Figure 21-14](#)).

Figure 21-14 Task Pane Documents Section: Adding a New File



The Add New Document dialog opens ([Figure 21-15](#)).

Figure 21-15 Add New Document Dialog



3. Browse to the file that you want to add to the current portal.

Note: WebCenter Portal supports files up to 2GB in size.

The check box **Make workspace updates available when I open my copy** is not supported.

4. Click **OK**.

The new file displays at the top of the document list in the **Documents** section of the Microsoft Office task pane. When you refresh the **Documents** page of the portal in WebCenter Portal, the file appears in the document list in alphabetical order.

21.3.4.2 Adding a New Folder

Using the Microsoft Office shared document management functionality, you can add a new folder to the Content Server repository, exposing the folder in a portal.

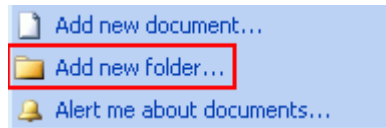
Note: Other methods to add a new folder to a portal are:

- Create a network place to a portal, then use Windows Explorer to add a folder, as described in [Section 21.4, "Working with Microsoft Windows Explorer Integration."](#)
 - Use the WebCenter Portal application to add a folder to any connected content repository, as described in [Section 19.4, "Creating a Folder."](#)
-
-

To add a new folder to a portal using the Microsoft Office task pane:

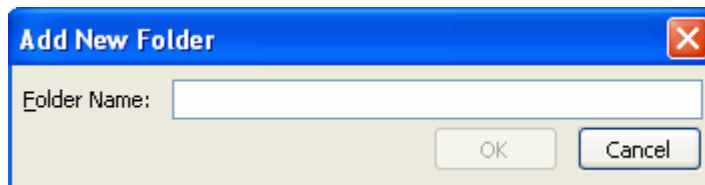
1. Open a Microsoft Word, Excel, or PowerPoint file in the portal to use the Microsoft Office shared document management functionality (see [Section 21.3.2, "Opening and Editing a File"](#)).
2. At the bottom of the **Documents** section of the task pane, click **Add new folder** ([Figure 21-16](#)).

Figure 21-16 Task Pane Documents Section: Adding a New Folder



The Add New Folder dialog opens ([Figure 21-17](#)).

Figure 21-17 Add New Folder Dialog



3. Enter a name for the new folder, then click **OK**.

Note: The rules for folder names follow the Windows Explorer standards.

The new folder displays at the top of the document list in the **Documents** section of the Microsoft Office task pane. When you refresh the **Documents** page of the portal in WebCenter Portal, the folder appears in the folder list in alphabetical order.

21.3.4.3 Checking a File Out

Note: To check any file out using the WebCenter Portal application, see [Section 21.3.4.3, "Checking a File Out."](#)

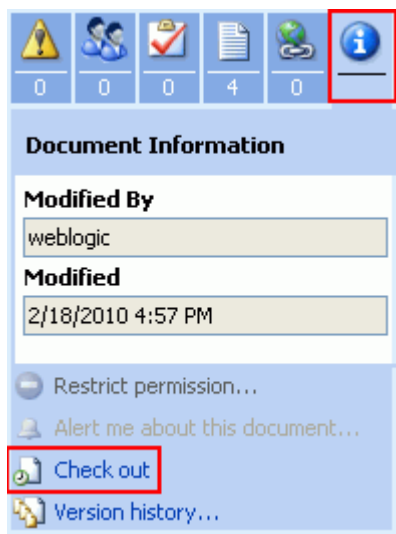
When you open a Microsoft Office file in a portal using the Microsoft Office shared document management functionality, the file is automatically checked out from the Content Server repository. If you have been granted the appropriate permissions, you can open and check a file out in two environments:

- **From WebCenter Portal.** Open a file in-place (see [Section 21.3.2, "Opening and Editing a File"](#)) to automatically check out the file.
- (Microsoft Office 2003 and 2007) **From the Microsoft Office task pane.** In the **Documents** section of the task pane, click a file name to automatically check out the file and open it in its default Microsoft Office application.

21.3.4.3.1 Checking the Currently Open File Out Again After Checking It In After you check a file in (see [Section 21.3.4.4, "Checking a File In"](#)), the file remains displayed in Microsoft Office until you close it (see [Section 21.3.5, "Closing a File"](#)). If you want to check in further changes to the file, it must be checked out again:

- **In Microsoft Office 2003.** In the **Document Information** section of the Microsoft Office task pane, you can optionally click **Check out** to check the file out again ([Figure 21–18](#)). However, even if you do not explicitly check out the file, you can continue to edit the file, then save it, and the **Status** and **Document Information** sections of the task pane automatically provide a **Check in** link to check the changed file back in to the repository.

Figure 21–18 Checking Out a Checked In File



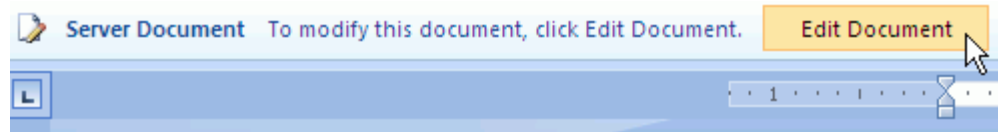
- **In Microsoft Office 2007 and 2010.** When you check a file in, the Check In dialog ([Figure 21–22](#)) provides a check box labeled **Keep the document checked out after checking in this version**:

- Select the check box to keep the file checked out after checking in the current version. This allows you to refresh the version of the file available to other users, yet still retain the checked out status to make further changes.
- Deselect the check box to check the file in and cancel the checked out status.

If you deselect the check box, you can optionally check the file out again:

- Click **Edit Document** in the area below the toolbar ([Figure 21–19](#)).

After you check a file in, Microsoft Office 2007 locks editing that file until you click **Edit Document**.

Figure 21–19 Checking Out and Editing the Current Document

21.3.4.4 Checking a File In

When you open a file using the Microsoft Office shared document management functionality, you can check it back in to the repository, whether or not you have made changes to it.

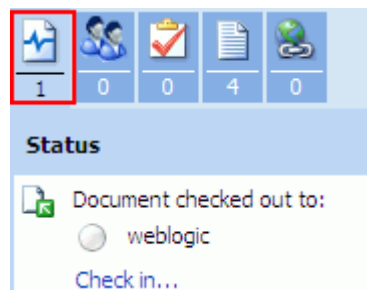
Note: This feature is available with Microsoft Office 2003 and 2007. Microsoft Office 2010 does not include a task pane.

In Microsoft Office 2010, you can find file check-in and checkout information on the **Info** tab (from the **File** menu, select **Info**). When you open a Microsoft Office 2010 file from WebCenter Portal (using any browser), the file is automatically checked out of the Content Server repository, changes are (temporarily) applied when saved, and the file is automatically checked in when the file is closed, with a default check-in comment.

Note: In Microsoft Office 2003 and 2007, saving the file without checking it in or closing the application saves it on the server, but changes are not visible to others until you check the file in. To update the file stored in the Content Server repository, you must explicitly check it in as described in this section. If you close the Microsoft Office application and do not check the file in when prompted, your changes are lost.

To check a file in:

1. In the **Status** section of the Microsoft Office task pane, click **Check in** (Figure 21–20).

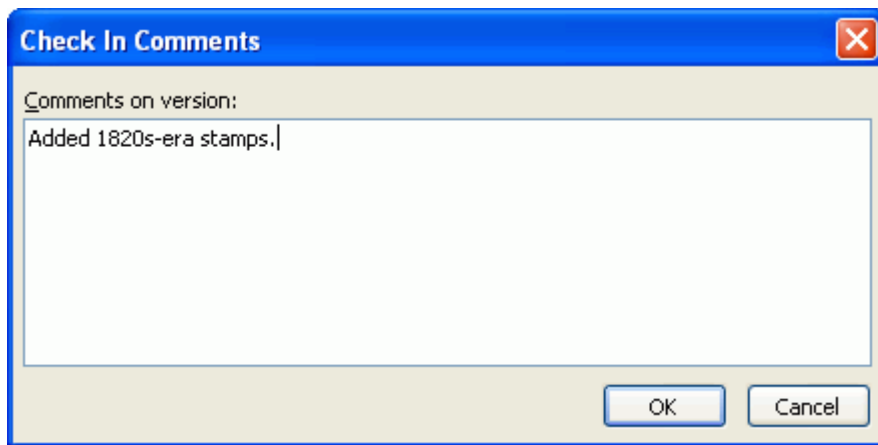
Figure 21–20 Status Section in MS Office 7: Checking In a File

Notes:

- If the **Check in** link does not display, click the icon for any other section, then return to the **Status** section to refresh the pane.
- In Microsoft Office 2003, you can also find **Check in** in the **Document Information** section of the task pane.

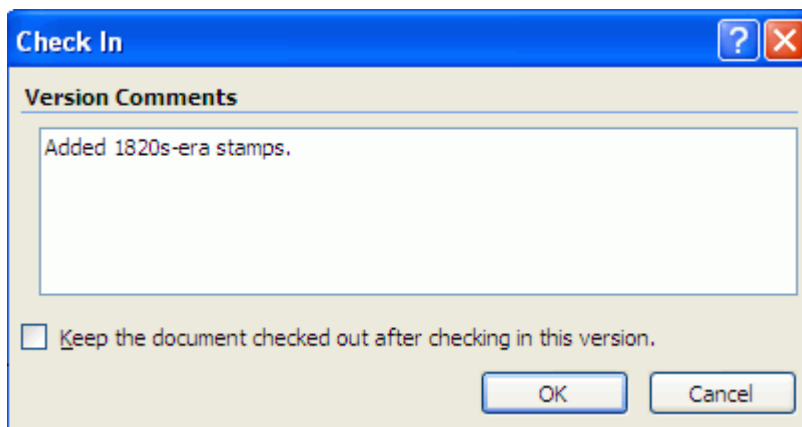
2. *In Microsoft Office 2003.* In the Check In Comments dialog (Figure 21–21), optionally enter comments about the changes made to the file since it was last checked out.

Figure 21–21 Check In Comments Dialog (Microsoft Office 2003)



In Microsoft Office 2007. In the Check In dialog (Figure 21–22), optionally enter comments about the changes made to the file since it was last checked out, and select the state in which to leave the file:

Figure 21–22 Check In Dialog (Microsoft Office 2007 and 2010)



- Select the check box to keep the file checked out after checking in the current version. This allows you to refresh the version of the file available to other users, yet still retain the checked out status to make further changes.
- Deselect the check box to check the file in and cancel the checked out status. To check the file out again, see [Section 21.3.4.3.1, "Checking the Currently](#)

Open File Out Again After Checking It In."

3. Click **OK**.

If the file was modified since its prior version, it is automatically saved and checked in to WebCenter Portal as a new version. If check in comments were entered in the Check In dialog, a new file revision is created with the new comments, which display as the file description in WebCenter Portal.

4. After checking a file in, the file remains displayed in Microsoft Office until you close it (see [Section 21.3.5, "Closing a File"](#)). If you wish to make further changes to the file, see [Section 21.3.4.3.1, "Checking the Currently Open File Out Again After Checking It In."](#)
5. When you have finished making changes and checking in the file, close the Microsoft Office application (see [Section 21.3.5, "Closing a File"](#)).

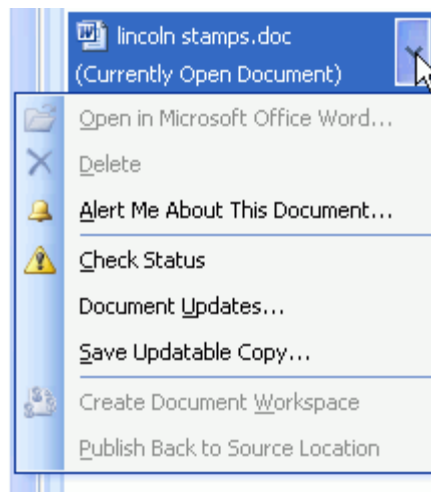
21.3.4.5 Managing the Currently Open File

Note: This feature is available with Microsoft Office 2003 and 2007. Microsoft Office 2010 does not include a task pane.

To manage the currently open file using the Microsoft Office task pane:

1. In the **Documents** section of the task pane, click the drop-down menu icon to the right of the file name ([Figure 21-23](#)).

Figure 21-23 Task Pane Documents Section: Current File Menu



2. Select an available action, as described in [Table 21-4](#):

Table 21-4 Drop-Down Menu Actions for Currently Open File

Menu Action	Description
Open in Microsoft Office <i>Application</i>	Not applicable.
Delete	Not supported. To delete a file in a portal, you must use the WebCenter Portal application (see Section 19.12, "Deleting Folders and Files") or Windows Explorer (see Section 21.4, "Working with Microsoft Windows Explorer Integration").

Table 21–4 (Cont.) Drop-Down Menu Actions for Currently Open File

Menu Action	Description
Alert Me About This Document	Not supported.
Check Status	Displays the Status section of the task pane.
Document Updates	Not supported.
Save Updatable Copy	Not supported.
Create Document Workspace	Not supported.
Publish Back to Source Location	Not supported.

21.3.4.6 Managing Other Files in the Current Portal

Note: This feature is available with Microsoft Office 2003 and 2007. Microsoft Office 2010 does not include a task pane.

To manage a file other than the currently open file in the current portal using the Microsoft Office task pane:

1. In the **Documents** section of the task pane, navigate to the file.

Note: Navigating upward in the folder hierarchy from the current document is not supported; you can drill down and then back up to the current level.

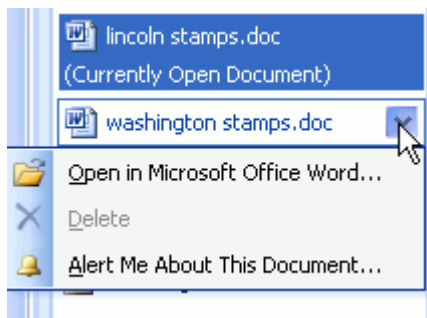
2. To open the file, click its name.

Depending on the file type, the file opens as described in [Section 21.3.2, "Opening and Editing a File"](#) for Microsoft Word, Excel, and PowerPoint files, or [Section 19.6.2, "Opening a File"](#) for other file types (such as HTML files or images).

Note: If you have OpenOffice installed, an error may occur when attempting to open a file from the task pane. To resolve the error, uninstall OpenOffice.

3. To perform other actions, click the drop-down menu icon to the right of a file name ([Figure 21–24](#)):

Figure 21–24 Task Pane Documents Section: Other Files Menu



4. Select an available action, as described in [Table 21–5](#):

Table 21–5 Drop-Down Menu Actions for Other Files

Menu Action	Description
Open in Microsoft Office <i>Application</i>	Attempts to check out the file: if checked out by another user, it opens read-only; if not checked out, the file opens in its Microsoft Office application for editing. For more information, see Section 21.3.2, "Opening and Editing a File."
Delete	Not supported. To delete a file in a portal, you must use the WebCenter Portal application (see Section 19.12, "Deleting Folders and Files") or Windows Explorer (see Section 21.4, "Working with Microsoft Windows Explorer Integration").
Alert Me About This Document	Not supported.

21.3.4.7 Managing Folders

Note: This feature is available with Microsoft Office 2003 and 2007. Microsoft Office 2010 does not include a task pane.

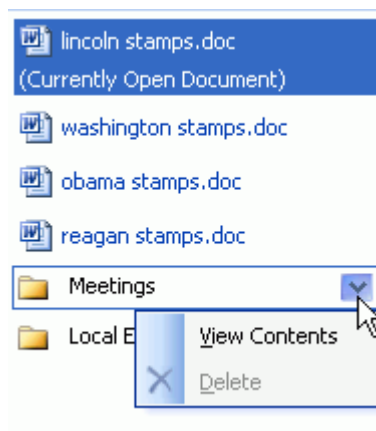
To manage a folder under the current folder using the Microsoft Office task pane:

1. In the **Documents** section of the task pane, navigate to the folder.

Note: Navigating upward in the folder hierarchy from the current document is not supported; you can drill down and then back up to the current level.

2. To open the folder, click its name.
3. To perform other actions, click the drop-down menu icon to the right of the folder name ([Figure 21–25](#)):

Figure 21–25 Task Pane Documents Section: Folder Menu



4. Select an available action, as described in [Table 21–6](#):

Table 21–6 Drop-Down Menu Actions for a Folder

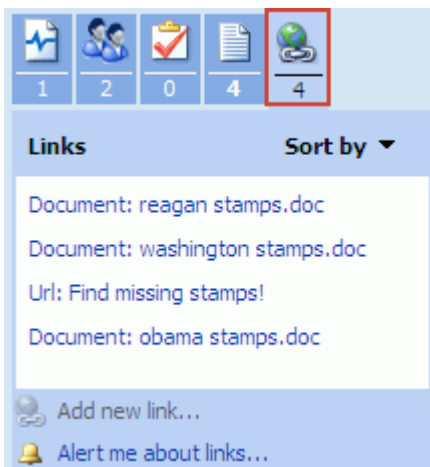
Menu Action	Description
View Contents	Refreshes the list of files with the contents of the folder only (same effect as clicking the folder name). Click the folder name to refresh to the original list.
Delete	Not supported. To delete a folder in a portal, you must use the WebCenter Portal application (see Section 19.12, "Deleting Folders and Files") or Windows Explorer (see Section 21.4, "Working with Microsoft Windows Explorer Integration").

21.3.4.8 Viewing Link Targets

Note: This feature is available with Microsoft Office 2003 and 2007. Microsoft Office 2010 does not include a task pane.

The **Links** section of the Microsoft Office task pane lists the links defined in WebCenter Portal that are associated with the currently open file ([Figure 21–26](#)). Files can have links to related documents, discussions, announcements, events, and notes; the **Links** section in the task pane shows the links to associated documents and notes.

Links are prefixed with the name of the service with which they are associated. For example, a link to another document is prefixed **Document**, a link to a note is prefixed **URL**.

Figure 21–26 Task Pane Links Section

To display the target of a link, simply click the link:

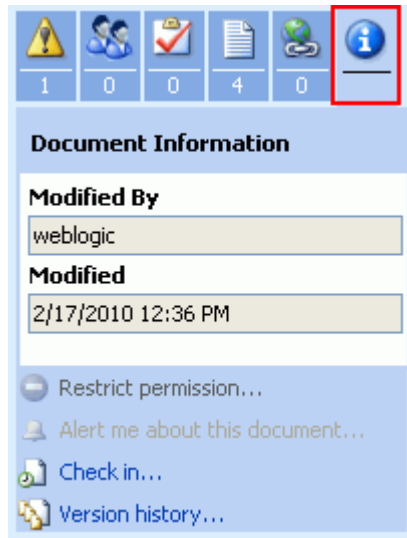
- Document links open in the same way as files in the **Document** section, namely Microsoft Word, Excel, and PowerPoint files open in Microsoft Office with a task pane, and other file types open in their default viewer or a browser.
- URL links open a browser window displaying the link target.

21.3.4.9 Viewing Document Information

Note: This feature is available with Microsoft Office 2003 and 2007. Microsoft Office 2010 does not include a task pane.

In Microsoft Office 2003: The **Document Information** section of the Microsoft Office task pane shows the user who last modified the file and the modified date (Figure 21–27).

Figure 21–27 Task Pane Document Information Section (Microsoft Office 2003 Only)



In Microsoft Office 2007: Information about the user who last modified the file and the modified date is shown in the Version History. See [Section 21.3.4.10, "Working with File Version History."](#)

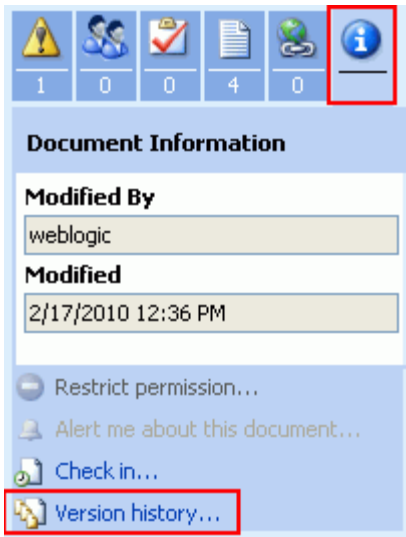
21.3.4.10 Working with File Version History

Whenever you check in a file or upload a file into a folder that already contains a file of the same name, WebCenter Portal creates a new version of the file. When a file has multiple versions, it has a version history.

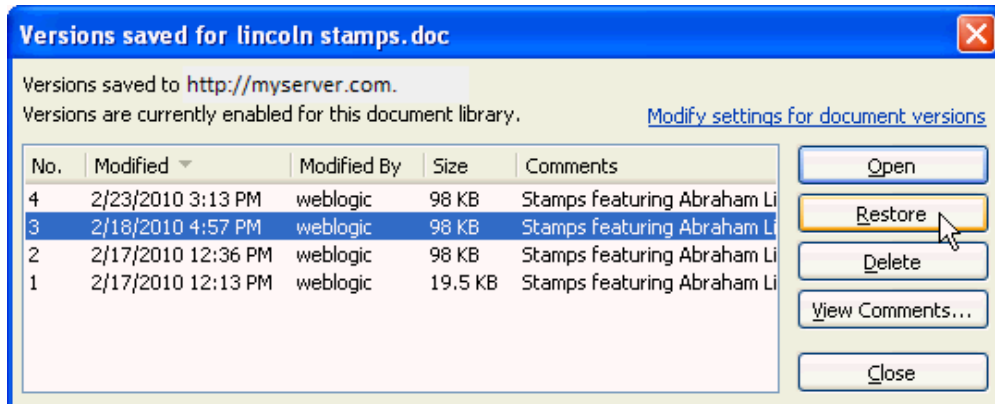
Note: To use the WebCenter Portal application to work with the version history of a file in any connected content repository, see [Section 19.16, "Viewing and Deleting File Version History."](#)

In Microsoft Office 2003: To view the version history of the currently open file using the Microsoft Office task pane:

1. In the **Document Information** section of the task pane, click **Version history** (Figure 21–28).

Figure 21–28 Task Pane Document Information Section: Version History

The version history dialog for the file opens (Figure 21–29):

Figure 21–29 Version History for Currently Open File in Microsoft Office 2003

In the version history dialog, select a file version, then select the desired action:

- **Open** to open the selected file version read-only.
 - **Restore** is not supported.
 - **Delete** to delete the selected file version (inactive for the most recent version).
 - **View Comments** to display the comments entered for the selected file version (most useful when the comments are especially long).
2. To open the **Documents** page in the current portal, click **Modify settings for document versions**.

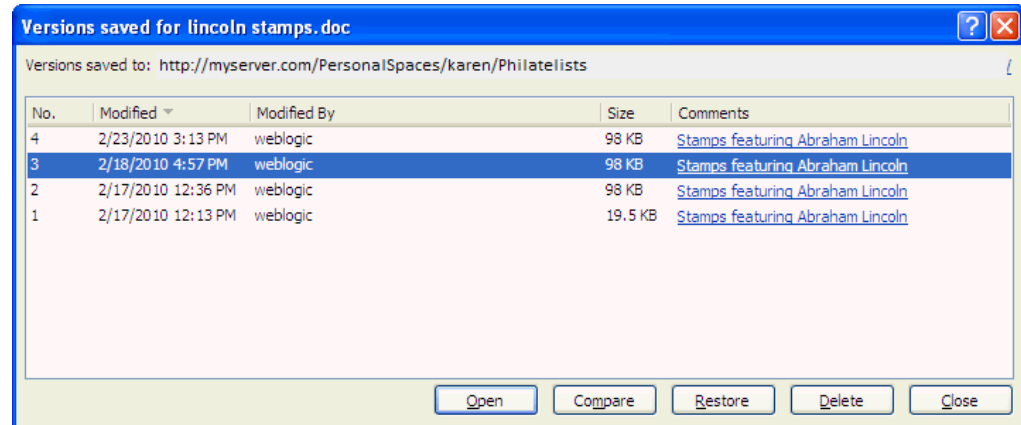
In Microsoft Office 2007: To view the version history of the currently open file:

1. Click the Office Button (Figure 21–30) in the top left corner of the Microsoft Office application.

Figure 21–30 Office Button in Microsoft Office

- From the **Server** menu, select **View Version History**.

The version history dialog for the file opens (Figure 21–31):

Figure 21–31 Version History for Currently Open File in Microsoft Office 2007

- In the version history dialog, select a file version, then select the desired action:
 - Open** to open the selected file version read-only.
 - Compare** to compare the selected file version with the currently open file.
 - Restore** is not supported.
 - Delete** to delete the selected file version (inactive for the most recent version).
- To view the check in comments for a file version, click the link under **Comments**.
- To open the **Documents** page in the portal, click the link next to **Versions saved to**.

In Microsoft Office 2010: To view the version history of the currently open file:

- From the **File** menu, select **Info**.

The **Info** tab shows version history information on the Info tab in the **Versions** section. Refer to the Microsoft Office online help for more information.

21.3.4.11 Adding Members to a Portal

Note: Adding members to a portal using the WebCenter Portal application is described in the "Managing Members and Assigning Roles in a Portal" chapter in *Building Portals with Oracle WebCenter Portal*.

If you are granted the Moderator role or Manage Security and Configuration permissions in a portal, you can add new members to a portal using the Microsoft Office task pane. The currently open file must be a portal document.

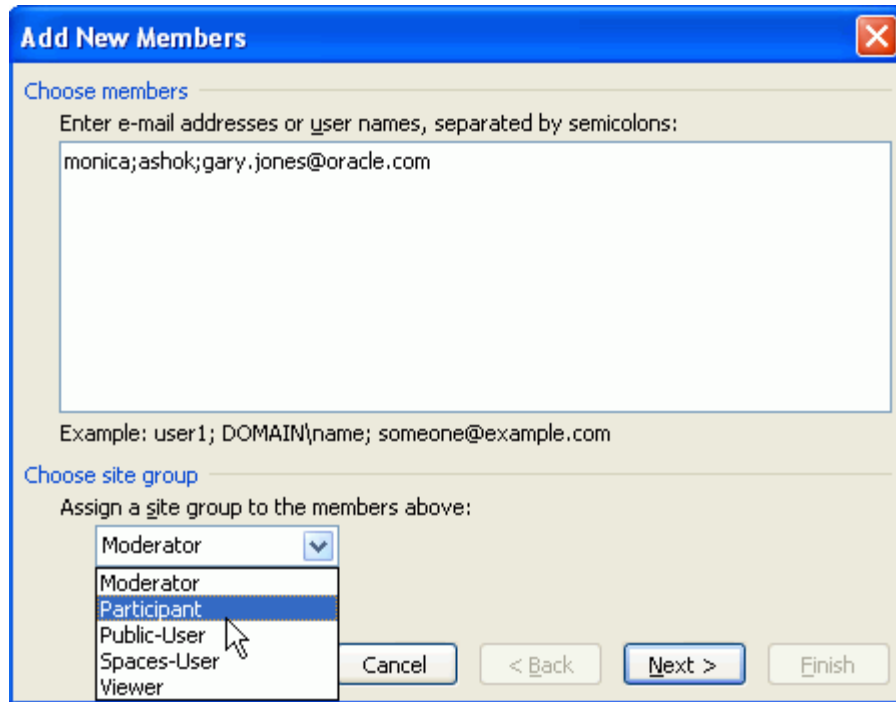
Note: This feature is available with Microsoft Office 2003 and 2007. Microsoft Office 2010 does not include a task pane.

To add members to a portal when the currently open file is a portal document:

1. In the **Members** section of the task pane, click **Add new members**.

The Add New Members dialog opens (Figure 21–32).

Figure 21–32 Add New Members Dialog



2. Enter the login names or mail addresses of the users you want to add to the portal, separated by semicolons.

Note: Users who are already members of the portal cannot be added again. The user names that you enter must have an associated mail address defined in WebCenter Portal.

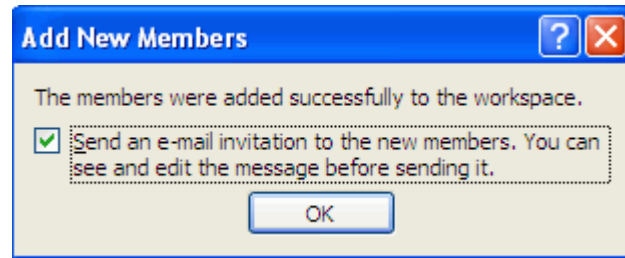
3. From the site group drop-down list, select the role to be given to the listed users. The listed roles are those defined for the current portal. The permissions granted to each role are defined by the application specialist or portal moderator.

Note: To define different roles to different users, limit the list of users to those who should be assigned the same role, finish this assignment, then click **Add new members** again to assign a different role to one or more different users.

4. Click **Next**.

5. Confirm or modify the member information, then click **Finish**.
6. In the Add New Members dialog (Figure 21–33), select or deselect the check box to send an invitation to the new members to join the portal, then click **OK**.

Figure 21–33 Add New Members Dialog



21.3.4.12 Sending a Message

From the Microsoft Office task pane, you can send a message to any user who has a mail address defined in WebCenter Portal:

- [Section 21.3.4.12.1, "Sending a Message to the Current User"](#)
- [Section 21.3.4.12.2, "Sending a Message to Your Connections"](#)
- [Section 21.3.4.12.3, "Sending a Message to Members of a Portal"](#)

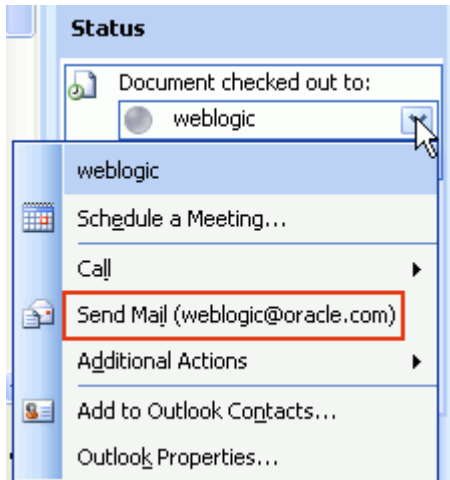
Note: This feature is available with Microsoft Office 2003 and 2007. Microsoft Office 2010 does not include a task pane.

Note: To send messages using the WebCenter Portal application, see [Section 10.5, "Sending Mail to Portal Members or Moderators,"](#) [Section 13.1, "About the Send Mail Feature,"](#) and [Section 13.4.5, "Composing and Sending Mail Messages."](#)

21.3.4.12.1 Sending a Message to the Current User To send a message to the user who has the currently open document checked out:

- In the **Status** section of the Microsoft Office task pane, click the drop-down menu icon next to the user name, and select **Send Mail** (Figure 21–34).

Figure 21–34 Send a Message to the Current Document User

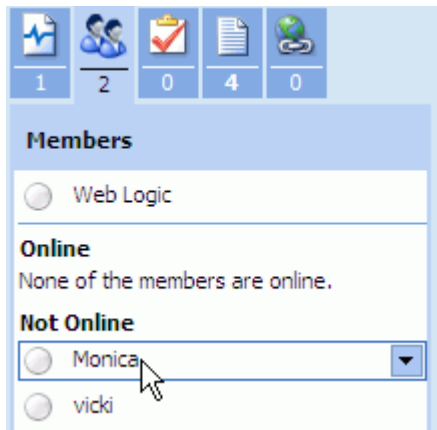


A Microsoft Outlook message composition window opens with the **To** field populated with the mail address that is specified for the user in WebCenter Portal.

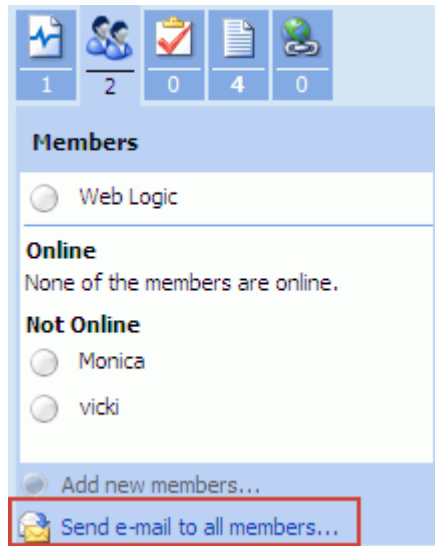
21.3.4.12.2 Sending a Message to Your Connections To send a message to your connections when you are working with a document in the Home portal:

1. In the **Members** section of the Microsoft Office task pane:
 - To send a message to an individual who is one of your connections, click the user name in the **Members** list (Figure 21–35):

Figure 21–35 Send a Message to a Connection



- To send a message to all of your connections, click **Send e-mail to all members** (Figure 21–36).

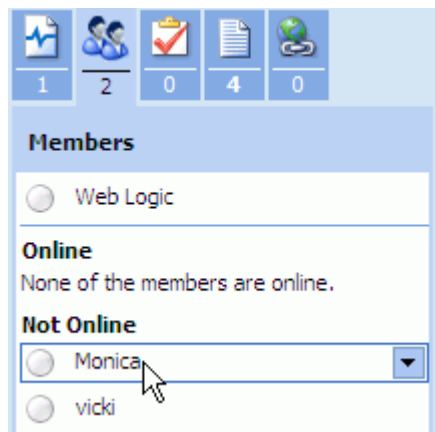
Figure 21–36 Send a Message to All Connections

A Microsoft Outlook message composition window opens, where the Home portal name is the subject, and the **To** field is populated with the mail address(es) specified for the people connection(s) in WebCenter Portal.

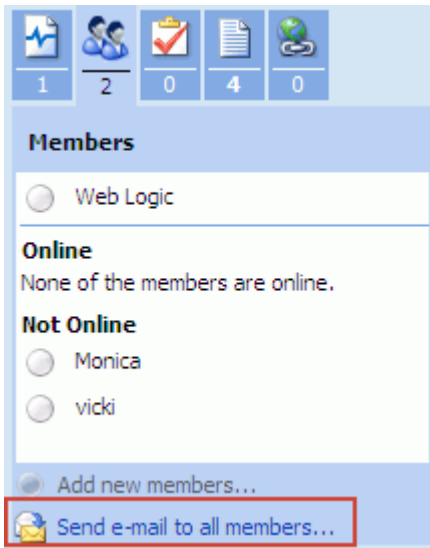
2. Modify the addresses and content of the message as desired, then click **Send**.

21.3.4.12.3 Sending a Message to Members of a Portal To send a message to the members of a portal when you are working with a document in the portal:

1. In the **Members** section of the Microsoft Office task pane:
 - To send a message to an individual who is a member of the portal, click the user name in the **Members** list (Figure 21–37):

Figure 21–37 Send a Message to an Individual Portal Member

- To send a message to all members of the portal, click **Send e-mail to all members** (Figure 21–38)

Figure 21–38 Send a Message to All Portal Members

A Microsoft Outlook message composition window opens, where the portal name is the subject, and the **To** field is populated with the mail address(es) specified for the portal member(s) in WebCenter Portal.

2. Modify the addresses and content of the message as desired, then click **Send**.

21.3.5 Closing a File

You can close a file opened in a Microsoft Office application with or without checking it in, as described in the following sections:

- [Section 21.3.5.1, "Closing a File After Checking It In"](#)
- [Section 21.3.5.2, "Closing a File Before Checking It In"](#)

21.3.5.1 Closing a File After Checking It In

After checking a file in, the file remains open in the Microsoft Office application until you close it.

To close a file after you have checked it in (see [Section 21.3.4.4, "Checking a File In"](#)):

- From the **File** menu, select **Close**.

21.3.5.2 Closing a File Before Checking It In

If you attempt to close a file or the Microsoft Office application before you have checked the file in, the Check In dialog provides the opportunity to check it in or cancel the check out and discard changes to the file. The selections in the Check In dialog are dependent on whether or not the file has been modified since the last time it was checked in:

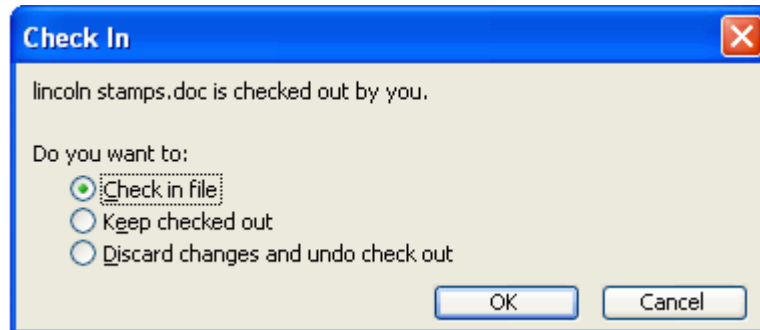
- [Section 21.3.5.2.1, "Closing an Unchanged File"](#)
- [Section 21.3.5.2.2, "Closing an Updated File"](#)

21.3.5.2.1 Closing an Unchanged File

In Microsoft Office 2003: To close a file that has *not* been modified since the last time it was checked in:

1. From the **File** menu, select **Close**.
2. In the Check In dialog (Figure 21–39), select one of the following actions:

Figure 21–39 Check In Dialog for File with No Changes (Microsoft Office 2003)



- **Check in file** to check the file in with no changes. In the Check In Comments dialog (Figure 21–21), optionally enter new comments, then click **OK**.
 - **Keep checked out** to close the file, but keep it in a checked out and locked to changes by other users. To later cancel the checked out status, see [Section 21.3.4.3, "Checking a File Out."](#)
 - **Discard changes and undo check out** to cancel the checked out status.
3. Click **OK**.

In Microsoft Office 2007: To close a file that has *not* been modified since the last time it was checked in:

- Click the Office Button (Figure 21–40) in the top left corner of the Microsoft Office application, then select **Close**.

Figure 21–40 Office Button in Microsoft Office



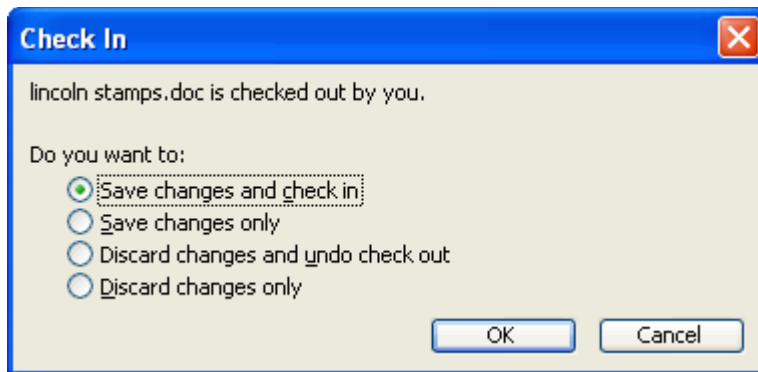
If a file is unchanged, Microsoft Office 2007 does not prompt you to first check the file back in again. If saving to a local draft folder instead of the Content Server repository (see [Section 21.2, "Configuring Microsoft Office Integration with WebCenter Portal"](#)), the file remains in a checked out status and locked to changes by other users, and you will need to explicitly cancel the checked out status (see [Section 19.8.1, "Checking a File Out"](#)). If saving to the Content Server repository, the checked out status is canceled upon closing the file.

21.3.5.2.2 Closing an Updated File

In Microsoft Office 2003: To close a file that has been modified since the last time it was checked in:

1. From the **File** menu, select **Close**.
2. In the Check In dialog (Figure 21–41), select one of the following actions:

Figure 21–41 Check In Dialog for File with Changes (Microsoft Office 003)



- **Save changes and check in** to save the changes since the last check in and check the file in.
 - **Save changes only** to save changes since the last check in, but keep the file checked out and locked to changes by other users. To later cancel the checked out status, see [Section 21.3.4.3, "Checking a File Out."](#)
 - **Discard changes and undo check out** to retain the prior saved version of the file and cancel the checked out status.
 - **Discard changes only** to retain the prior saved version of the file and keep the file checked out.
3. Click **OK**.

In Microsoft Office 2007: To close a file that has been modified since the last time it was checked in:

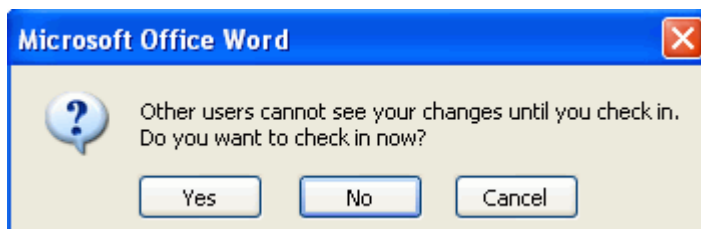
1. Click the Office Button ([Figure 21–42](#)) in the top left corner of the Microsoft Office application, then select **Close**.

Figure 21–42 Office Button in Microsoft Office



2. If you have not already saved the changes, respond to the confirmation prompt to save or discard your changes.
3. In the confirmation dialog ([Figure 21–43](#)), respond to the prompt:

Figure 21–43 Close File Confirmation Prompt (Microsoft Office 2007)



- **Yes** to display the Check In dialog where you can enter version comments and select whether or not you want the file to remain checked out (see

Section 21.3.4.4, "Checking a File In").

- **No** to skip the check-in, with one of the following results (see [Section 21.2, "Configuring Microsoft Office Integration with WebCenter Portal"](#)):
 - If saving to a local draft folder, the file remains checked out and locked to changes by other users. To later cancel the checked out status, see [Section 19.8.2, "Cancelling a Checked Out Status."](#)
 - If saving to the Content Server repository, the checked out status of the file is canceled, and any updates to the file are lost.

21.4 Working with Microsoft Windows Explorer Integration

WebCenter Portal integrates with Microsoft Windows Explorer to manage the folders and files in the Home portal or a group portal when the back-end content repository is Content Server.

In WebCenter Portal, the most useful feature of Windows Explorer integration is the ability to add multiple files at once to a portal, rather than uploading up to 10 files at a time (see [Section 19.5.1, "Uploading Files"](#)). It is important to be aware that Windows Explorer is not designed as a content repository, so if you try to open, delete, or rename a file that is checked out by another user, an error message displays to notify you that the operation failed, but the error message will not be specific as to the cause of the failure.

To expose the folders and files in a portal in Windows Explorer, you create a new Windows network place to work with the files, as described in the following sections:

- [Section 21.4.1, "Adding a Portal as a Network Place"](#)
- [Section 21.4.2, "Working with Files Using Windows Explorer"](#)

21.4.1 Adding a Portal as a Network Place

To expose the folders and files in a portal using Windows Explorer, you can add the portal as a Windows network place.

To add a portal as a Windows network place:

1. Open the Add Network Place/Location wizard:
 - In Microsoft Windows XP, open My Network Places and click **Add Network Place**.
 - In Microsoft Windows 7, right-click My Computer, and select **Add a Network Location**.

Refer to the Microsoft Windows online help for more information.

2. In the Add Network Place/Location wizard, enter the network address using the following format:

Tip: The host name and port is shown in the browser URL for your WebCenter Portal application.

To find the name of the repository server:

- On the **Documents** page of the portal you want to connect to, or the Home portal, from the **View** menu, select **Containing Folder Info**.
- Use the portion of the **Identifier** value that precedes the pound (#) sign as the repository server value. For example, if the **Identifier** value is `myserver-ucm#dCollectionID:549132825864000605`, then the repository server value is `myserver-ucm`.

- To access all portals in your WebCenter Portal application through Windows Explorer:

```
http://hostname:port/wcsdocs/conn/repository_server/spaces/
```

For example:

```
http://myserver:8888/wcsdocs/conn/myserver-ucm/spaces/
```

- To access the Home portal through Windows Explorer:

```
http://hostname:port/wcsdocs/conn/repository_server/spaces/PersonalSpaces/username
```

For example:

```
http://myserver:8888/wcsdocs/conn/myserver-ucm/spaces/PersonalSpaces/wcsadmin
```

- To access a specific portal through Windows Explorer:

```
http://hostname:port/wcsdocs/conn/repository_server/spaces/instance/portalname
```

For example:

```
http://myserver:8888/wcsdocs/conn/myserver-ucm/spaces/WebCenter/philatelists
```

3. At the prompt, enter your WebCenter Portal login credentials.
4. Optionally enter a name for the portal network place, then click **Finish**.

Windows Explorer displays a drive for all portals or the folders and files of a portal, depending on the URL you entered.

21.4.2 Working with Files Using Windows Explorer

Once you have created a Windows network place to a portal (see [Section 21.4.1, "Adding a Portal as a Network Place"](#)), you can manage the folders and files using Windows Explorer.

Note: If a portal moderator changes the internal name of a portal, the original network place to that individual portal is no longer accessible. You will need to add the portal as a Windows network place again using the new portal internal name. Changing the internal name of an individual portal has no effect if you create a network place to the *parent URL for all portals* (`http://hostname:port/wcsdocs/conn/repository_server/spaces/`).

In Windows Explorer, navigate to the network place for the portal to perform any of the following actions:

- Copy and paste folders and files from your local file system.
- Create folders and files.
- Delete folders and files if not checked out by another user.
- Open Microsoft Word, Excel, and PowerPoint files using the Microsoft Office shared document functionality. See [Section 21.3, "Working with Microsoft Word, PowerPoint, and Excel Integration."](#)
- Open other file types in their default applications.

When you open a file, an attempt is made to check the file out. If it is checked out by another user, or you do not have permissions to update the file, it will open read-only. A file remains checked out until you check it back in (see [Section 21.3.4.4, "Checking a File In"](#)).

The changes you make in Windows Explorer are reflected in WebCenter Portal, and vice versa.

Note: To use the WebCenter Portal application to manage folders and files in a portal in any connected content repository, see [Chapter 19, "Creating and Managing Documents."](#)

Part V

Staying Informed

Part V contains the following chapters:

- Chapter 22, "Getting Notified When Things Change"
- Chapter 23, "Exploring Recommendations and Content"
- Chapter 24, "Tracking Portal Activities"
- Chapter 25, "Working with Announcements"
- Chapter 26, "Working with Polls"
- Chapter 27, "Monitoring RSS Feeds"
- Chapter 28, "Exploring Your Worklists"

Getting Notified When Things Change

This chapter describes how to subscribe and unsubscribe to portals and application objects, how to specify how you are notified when they are changed, and how to manage your subscriptions.

This chapter includes the following topics:

- [Section 22.1, "About Subscriptions and Notifications"](#)
- [Section 22.2, "Establishing and Managing Your Messaging Channels and Filters"](#)
- [Section 22.3, "Subscribing to the Application, to Portals, and to Objects"](#)
- [Section 22.4, "Viewing and Cancelling Your Subscriptions"](#)

Permissions: The tasks described in this chapter are available to any WebCenter Portal user. However, your system administrator can enforce certain application defaults that prevent you from setting subscription and notification preferences for yourself. In such cases, you will be unable to perform some of the actions described in this chapter.

22.1 About Subscriptions and Notifications

Subscriptions and Notifications allow you to receive timely notice of changes in WebCenter Portal—track changes that occur to your connections, your portal memberships, content in specific portals, and other application objects that are important to you. You can receive notifications through phone text, mail, or your Worklist.

Notifications provide an automated means of triggering notices across different messaging channels. Messages are triggered when the portals and application objects to which you have subscribed change.

Messaging channels can include phone text, mail, or Worklist (depending on how your system administrator has configured Notifications). For example, you 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 you receive an invitation to connect. All messages contain links that take you to the scene of the change.

You can select the objects that trigger a notice by subscribing to them. In WebCenter Portal, there are three levels of subscription:

- *Application*, which you can use to receive notices about changes to your portal memberships, Message Board, Connections, and Feedback

Such notifications occur only for application-level activities that involve you as the user.

- *Portal*, for changes to a subscribed feature, such as Events, Discussions, Announcements, Documents, and Blogs, that occur within the scope of a selected portal
- *Object*, for changes to the application objects to which you have specifically subscribed, such as a particular document, wiki, blog, and so on

[Table 22–1](#) describes the types of activities that can trigger a notification and indicates the level and location of the associated subscription (for more information, see [Section 22.3, "Subscribing to the Application, to Portals, and to Objects"](#)).

Note: Owning an object, such as a document, wiki, or blog, does not automatically subscribe you to that object. You must explicitly subscribe to an object to receive subscription-related notifications about it, unless the system administrator has set and enforced company-wide subscription defaults. For more information about object-level subscriptions, see [Section 22.3.3, "Setting Object-Level Subscriptions."](#)

Table 22–1 *Activities that Can Trigger Notifications*

Activity	Level	Where to Subscribe
A user sends you an invitation to connect Note: Out of the box, the option to send notifications for invitations to connect is enabled and is not end-user configurable.	Application	Preferences (for more information, see Section 22.3.1, "Setting Application-Level Subscriptions")
Your portal role changes, for example from Participant to Moderator	Application	Preferences
You are added as a member of a portal	Application	Preferences
Your portal membership is removed	Application	Preferences
A user posts a message to your Message Board	Application	Preferences
A user likes your Message Board post (messages explicitly set on a Message Board and not those added from Publisher to the Activity Stream)	Application	Preferences
A user comments on your Message Board post (messages explicitly set on a Message Board and not those added from Publisher to the Activity Stream)	Application	Preferences
A user posts feedback for you	Application	Preferences
An announcement is created	Portal	On the portal, for example, from the Actions menu on a portal in Browse portals (for more information, see Section 22.3.2, "Setting Portal-Level Subscriptions")
A new event is created	Portal	On the portal
An event is updated	Portal	On the portal
An event is deleted	Portal	On the portal
A new discussion topic is created	Portal	On the portal
A new discussion forum is created	Portal	On the portal

Table 22–1 (Cont.) Activities that Can Trigger Notifications

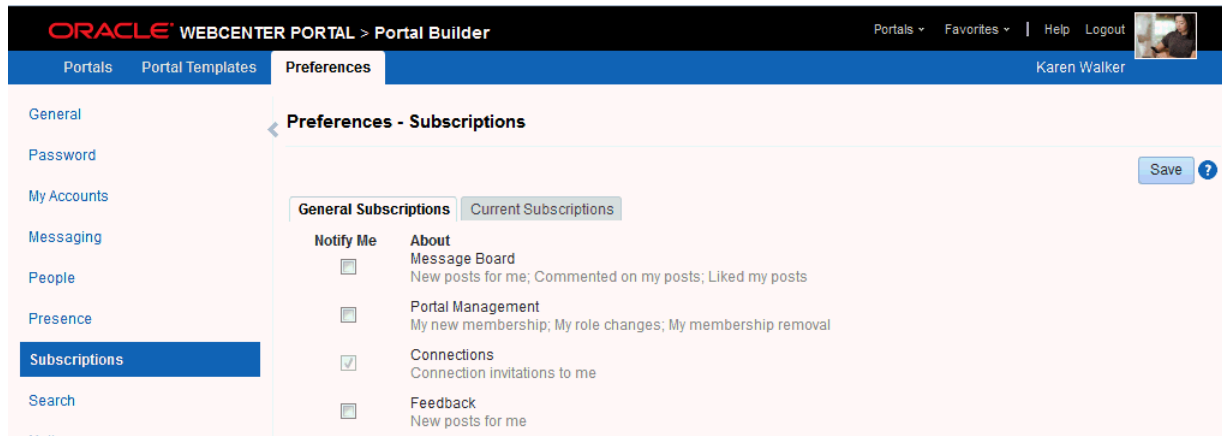
Activity	Level	Where to Subscribe
A new document is created or uploaded	Portal	On the portal
A wiki document is created	Portal	On the portal
A new blog entry is posted	Portal	On the portal
A user replies to a discussion topic	Object	On the topic (for more information, see Section 22.3.3, "Setting Object-Level Subscriptions")
A user comments on a discussion topic	Object	On the topic
A user deletes a discussion topic	Object	On the topic
A user comments on a document	Object	On the document
A user likes a document	Object	On the document
A user updates a document	Object	On the document
A user deletes a document	Object	On the document
A user comments on a wiki document	Object	On the wiki
A user likes a wiki document	Object	On the wiki
A user updates a wiki document	Object	On the blog entry
A user deletes a wiki document	Object	On the blog entry
A user comments on a blog entry	Object	On the blog entry
A user likes a blog entry	Object	On the blog entry
A user updates a blog entry	Object	On the blog entry
A user deletes a blog entry	Object	On the blog entry

You can establish your preferred messaging channels through the **Messaging** page of your Preferences (for more information, see [Section 22.2, "Establishing and Managing Your Messaging Channels and Filters"](#)). Additionally, you can use messaging preferences to create filters for the types of notifications you want to receive.

Messaging configuration is available when your system administrator selects a BPEL server as the connection type for outbound notifications. If the system administrator selects a Mail server, the only available messaging channel is mail; consequently, you are neither required nor able to configure your own messaging channels when your system administrator selects a Mail server as the connection type for outbound notifications.

Default settings for application-level subscriptions are configurable by the system administrator. This means that your initial view of application-level Subscription Preferences is determined by these system administrator defaults. Application-level subscriptions appear on the **General Subscriptions** tab of the **Subscriptions** page in your Preferences ([Figure 22–1](#)).

Figure 22–1 General Subscriptions Preferences



For each option on the **General Subscriptions** tab, the system administrator controls two settings:

- Whether the subscription is enabled for the feature
- Whether users are allowed to change the default setting

These settings determine how and whether general subscription options appear on your view of the tab. [Table 22–2](#) illustrates how administrator-level subscription settings affect the appearance of the **General Subscriptions** tab.

Table 22–2 Effect of Administrator Defaults on Subscriptions Preferences

Subscription Enabled ¹	User Can Change Default	Option in Preferences
True	True	Rendered normally, check box selected
False	True	Rendered normally, check box deselected
True	False	Grayed out, check box selected
False	False	Hidden, check box hidden

¹ Rather than enabling or disabling the entire subscription capability, the `subscription-enabled` attribute merely sets the initial state of the preference option. For example, if `subscription-enabled="true"`, then the associated subscription option is selected by default in Portals Preferences. If `subscription-enabled="false"`, then the associated subscription option is not selected by default in Preferences.

You can view and delete all of your subscriptions from one location: the **Current Subscriptions** tab on the **Subscriptions** page in Preferences ([Figure 22–2](#)).

Figure 22–2 Current Subscriptions Preferences

The screenshot shows the Oracle WebCenter Portal interface. The top navigation bar includes 'ORACLE WEBCENTER PORTAL > Portal Builder', 'Portals', 'Favorites', 'Help', 'Logout', and a user profile for 'Karen Walker'. The left sidebar contains various settings categories, with 'Subscriptions' selected. The main content area is titled 'Preferences - Subscriptions' and features two tabs: 'General Subscriptions' and 'Current Subscriptions'. The 'Current Subscriptions' tab is active, displaying a table of subscriptions. A 'Save' button is located in the top right corner of the table area.

Portal Name	Service	Resource Type	Resource Name	Created On
Philatelists	Documents	Wiki Document	Upcoming Events	6/27/13 9:40 PM
Philatelists	Documents	Document	Member Meeting Schedule.htm	6/27/13 9:40 PM
Philatelists	Announcements	All Resources		6/27/13 9:39 PM
Philatelists	Events	All Resources		6/27/13 9:39 PM
Philatelists	Blogs	All Resources		6/27/13 9:39 PM
Philatelists	Documents	All Resources		6/27/13 9:39 PM
Philatelists	Discussions	All Resources		6/27/13 9:39 PM

Use the **Subscriptions** page to view and manage all of your application-, portal-, and object-level subscriptions. For more information, see [Section 22.4, "Viewing and Cancelling Your Subscriptions."](#)

WebCenter Portal also provides Notifications viewers that can be added to a portal page. The Notifications viewers duplicate the features provided through Notifications preferences, with the added benefit of flexibility. That is, the Notifications viewers can be placed on any page. Additionally, the Subscription Preferences viewer changes scope according to where it is placed.

Two Notifications viewers are available:

- **Subscription Preferences**, which provides subscription options according to where its is placed:
 - A Subscription Preferences viewer on a Home portal page provides application-level subscription options ([Figure 22–3](#)).

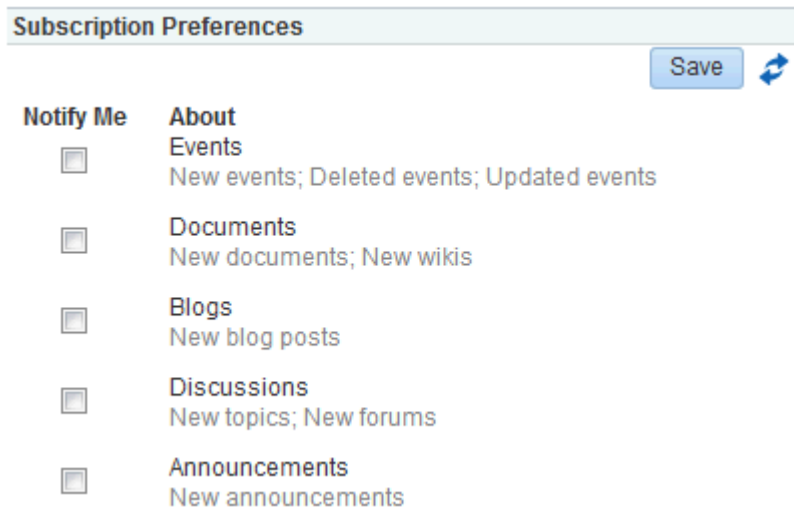
Figure 22–3 Subscription Preferences Viewer on a Home Portal Page

The screenshot shows the 'Subscription Preferences' viewer. At the top, there is a header 'Subscription Preferences' and a 'Save' button. Below the header, there is a section titled 'Notify Me About' with four items, each with a checkbox and a description of the notifications:

- Message Board**
New posts for me; Commented on my posts; Liked my posts
- Portal Management**
My new membership; My role changes; My membership removal
- Connections**
Connection invitations to me
- Feedback**
New posts for me

- A Subscription Preferences viewer on a portal page provides portal-level subscription options ([Figure 22–4](#)).

Figure 22–4 Subscription Preferences Viewer on a Portal Page



See Also:

- [Section 22.3.1, "Setting Application-Level Subscriptions"](#) and [Section 22.4.1, "Viewing and Cancelling Application-Level Subscriptions."](#)
- [Section 22.3.2, "Setting Portal-Level Subscriptions"](#) and [Section 22.4.2, "Viewing and Cancelling Portal- and Object-Level Subscriptions."](#)
- **Subscription Viewer**, which provides the same controls that are available on the **Current Subscriptions** tab of the **Subscriptions** page in Preferences ([Figure 22–5](#))

Figure 22–5 Subscription Viewer

Subscription viewer				
Unsubscribe		Filter <input type="text"/>		
Portal Name	Service	Resource Type	Resource Name	Created On
Sales Portal	Discussions	All Resources		5/2/13 10:21 PM
Sales Portal	Discussions	Topic	Sales Giveaway Ideas	5/2/13 10:20 PM
Sales Portal	Documents	All Resources		5/2/13 10:21 PM

See Also: [Section 22.4.2, "Viewing and Cancelling Portal- and Object-Level Subscriptions."](#)

22.2 Establishing and Managing Your Messaging Channels and Filters

Out of the box, your mail address is your default messaging channel, and, with no filters defined, a subscription is sufficient to trigger a notification, provided your system administrator has configured the external application associated with the Mail server connection to contain shared credentials and provided mail is selected as the messaging default.

After you have subscribed to an application object, no additional configuration is required to receive a notification through your mail when that object changes.

However, if you want to receive notifications over your phone, through your Worklist, or via an alternate mail address, a little configuration is required. First you must establish a messaging channel. Then you must define a messaging filter. The channel identifies the delivery medium and its associated address (user ID, mail, or phone number). The filter refines the types of notifications you receive and sets the conditions under which a notification is triggered.

This section steps you through the process of setting up your messaging channels and filters. It includes the following subsections:

- [Section 22.2.1, "Accessing Messaging Configuration Settings"](#)
- [Section 22.2.2, "Establishing a Messaging Channel"](#)
- [Section 22.2.3, "Editing a Messaging Channel"](#)
- [Section 22.2.4, "Deleting a Messaging Channel"](#)
- [Section 22.2.5, "Creating and Applying Messaging Filters"](#)
- [Section 22.2.6, "Editing Messaging Filters"](#)
- [Section 22.2.7, "Deleting Messaging Filters"](#)

22.2.1 Accessing Messaging Configuration Settings

The **Messaging** page in Preferences provides a **Manage Configuration** button for navigating to User Messaging Preferences.

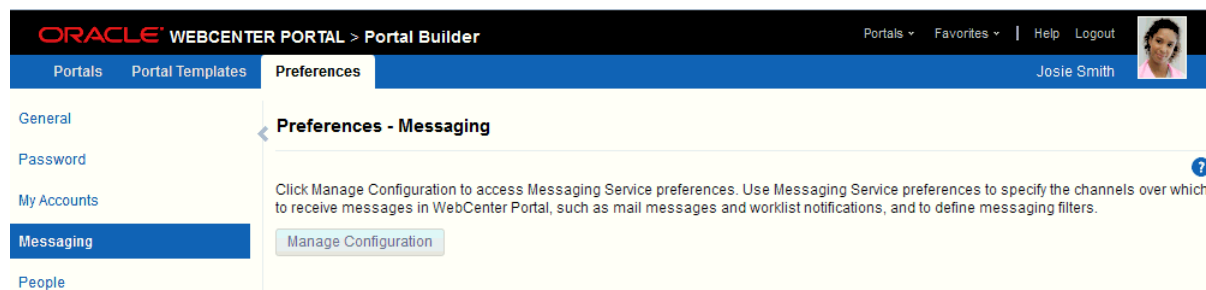
To access messaging configuration settings:

1. Open the Preferences dialog, and click **Messaging** to bring the **Messaging** panel forward.
2. Click the **Manage Configuration** button to open User Messaging Preferences login page.

Note: The **Manage Configuration** button is active only when a BPEL server is configured with Portal application. Because the BPEL server provides notification features, the **Manage Configuration** button may be active even when your system administrator elects to use a mail server in lieu of a BPEL server for Notifications.

3. Log in to the User Messaging Server (this is not required if single sign-on is implemented).

This opens the User Messaging Preferences panel ([Figure 22–6](#)).

Figure 22–6 Messaging Panel in Preferences Dialog

The **Messaging Channels** tab provides controls for creating and managing messaging channels and a view of all configured messaging channels, such as WORKLIST, EMAIL, and SMS. The EMAIL channel is always available. By default, it uses your email address from the LDAP identity store. If the WORKLIST driver is deployed by your system administrator, it is also automatically added for each user.

The **Messaging Filters** tab provides a means of defining the conditions under which you are notified and associating a messaging channel with a defined set of conditions.

For information about messaging configuration, see the following subsections:

- [Section 22.2.2, "Establishing a Messaging Channel"](#)
- [Section 22.2.3, "Editing a Messaging Channel"](#)
- [Section 22.2.4, "Deleting a Messaging Channel"](#)
- [Section 22.2.5, "Creating and Applying Messaging Filters"](#)
- [Section 22.2.6, "Editing Messaging Filters"](#)
- [Section 22.2.7, "Deleting Messaging Filters"](#)

Note: In environments where multiple BPEL connections are registered against the WebCenter Portal's Worklist component, the messaging preferences repository is shared by all. When you set messaging preferences for one connection, you set them for all.

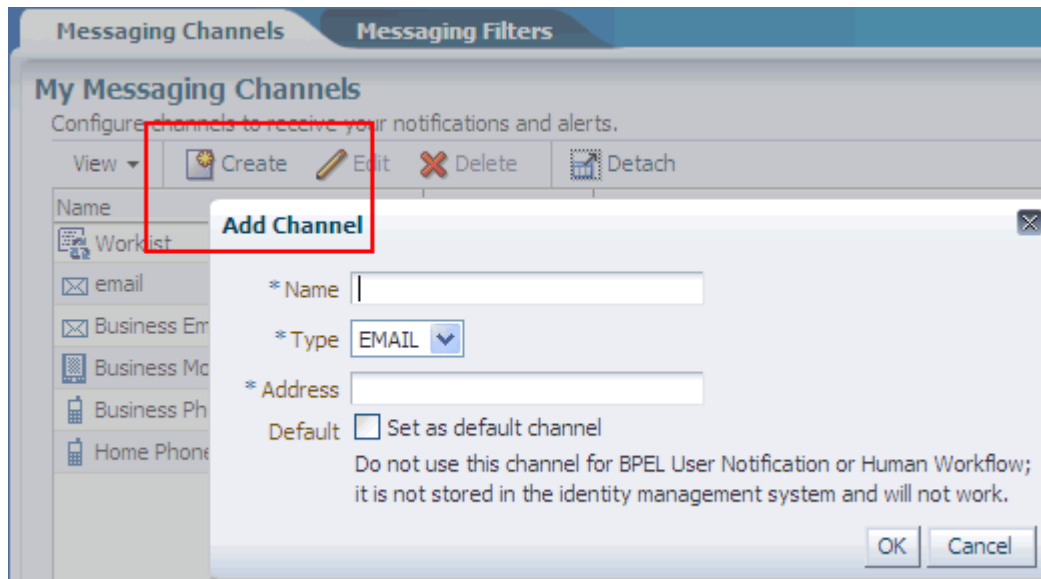
22.2.2 Establishing a Messaging Channel

Establishing a messaging channel involves selecting the channel over which a notification is sent and providing the delivery address for that channel.

To establish a messaging channel:

1. Go to the User Messaging Preferences page as described in [Section 22.2.1, "Accessing Messaging Configuration Settings."](#)
2. If necessary, click the **Messaging Channels** tab to bring it forward.
3. Click the **Create** icon to open the Add Channel dialog ([Figure 22–7](#)).

Figure 22–7 Create Icon and Add Channel Dialog



4. In the **Name** field, enter a display name for the channel.
For example, enter *MyPhone*.
5. From the **Type** list, select the channel over which to send notifications:
 - Tip:** The presence of a channel is determined by your system administrator, who deploys them and makes them available.
 - **EMAIL** to specify that notifications are sent to you through your mail
 - **SMS** to specify that notifications are sent as text messages to your phone
 - **WORKLIST** to specify that notifications are posted to your Worklist
6. In the **Address** field, enter an address for the selected type:
 - For **EMAIL**, enter the address of the mail account to which to send notifications, for example, *my.name@example.com*.
 - For **SMS**, enter the phone number to which to send notifications in the format *<country_code><area_code><number>*, for example, *14154444444*.
 - For **WORKLIST**, your user name is provided as a read-only value.
7. For the **Default** check box:
 - Select to identify one or more channels as the default channel over which to send notifications.
Default channels are the channels over which are sent all notifications that do not meet any of your defined filtering conditions.
 - Deselect to prevent selected channels from being used as defaults.
8. Click **OK** to save your changes and exit the dialog.

To complete your configuration, see [Section 22.2.5, "Creating and Applying Messaging Filters."](#)

22.2.3 Editing a Messaging Channel

To revise messaging channel values:

1. Go to the User Messaging Preferences page as described in [Section 22.2.1, "Accessing Messaging Configuration Settings."](#)
2. If necessary, click the **Messaging Channels** tab to bring it forward.
3. Select the messaging channel you want to revise, and click the **Edit** icon to open the Modify Channel dialog.
4. Change values as desired.
5. Click **OK** to save your changes and exit the dialog.

22.2.4 Deleting a Messaging Channel

When you delete a messaging channel, any filters that rely on the deleted channel revert to the channel identified as the default. In the absence of a specifically identified default channel, the mail channel is used for sending notifications.

To delete a messaging channel:

1. Go to the User Messaging Preferences page as described in [Section 22.2.1, "Accessing Messaging Configuration Settings."](#)
2. If necessary, click the **Messaging Channels** tab to bring it forward.
3. Select the messaging channel you want to delete, and click the **Delete** icon.
4. Click **OK** in the resulting Confirmation dialog.

22.2.5 Creating and Applying Messaging Filters

Messaging filters enable you to qualify the types of notifications you want to receive and weed out the notifications of no interest. Filters also provide a means of associating a selected messaging channel with a particular type of notification. For example, using messaging filters, you can specify that all notifications about document updates go to mail while all notifications about event changes go to your phone, provided your system administrator has configured Notifications to use multiple messaging channels.

Two important things to know about setting up messaging filters:

- Text values in your filtering conditions are case-sensitive. For example, messaging filters differentiate between *Document* and *document*.
- Create separate conditions for multiple terms. For example, for a Subject that contains *Monty gave feedback*, create three filtering conditions, one for each term.

To create and apply messaging filters:

1. Go to the User Messaging Preferences page as described in [Section 22.2.1, "Accessing Messaging Configuration Settings."](#)
2. If necessary, click the **Messaging Filters** tab to bring it forward.
3. Click the **Create** icon to open a filter-creation page.
4. In the **Filter Name** field, enter a display name for the filter.
5. Optionally, enter a filter description in the **Description** field.
6. From the **Matching** list, select from:

- **All of the following conditions** to require that all of the conditions you specify are met
 - **Any of the following conditions** to require that at least one of the conditions you specify is met
7. From the first **Add Filter Condition** list, select from:
- **Subject** to base a condition on words appearing in the message subject
It is likely that the most useful filter condition option is **Subject**. The subjects of notification messages are standardized and can therefore be anticipated. This makes subjects ideal for setting up filtering conditions. See [Table 22–4](#) for a list of standard notification message subjects and examples of filter conditions.
 - **From** to base a condition on the message sender
All notification messages are sent from the same entity—as configured by your system administrator.
 - **Date** to base a condition on when the message was generated
Date and Time options may be useful for ad hoc situations, for example, you want to ensure that any notifications about events delivered on the day of the event are sent right to your phone.
 - **Time** to base a condition on the time the message was generated

Note: Of all the filter conditions available on the **Add Filter Condition** list, **Subject**, **From**, **Date**, and **Time** are the options that are relevant to and work with the types of messages generated by Notifications. The other options have no effect.

8. From the second **Add Filter Condition** list, select an operator for the condition.

See Also: [Table 22–3](#) for an alphabetical list of operators that are relevant to the attributes **Subject**, **From**, **Date**, and **Time**.

9. Click the **Click to add new filter condition** icon.

10. From the **Messaging Option** list, select from:

- **Send No Messages** to omit notification for the defined filter conditions
- **Send Messages to all Selected Channels** to send notification through all channels selected from the **Add Notification Channel** list
- **Send to the First Available Channel** to send notification through the first open channel of all the selected channels

11. From the **Add Notification Channel** list, select the channel over which to send the notification messages that meet your defined filter conditions, and then click the **Click to add channel to this filter** icon.

The **Add Notification Channel** list is populated with the channels that are defined on the **Messaging Channels** tab. You can add multiple channels in turn.

12. Click **OK** to save and apply the messaging filter.

Tip: If your defined filtering conditions do not match an incoming notification, the User Messaging Server will send notifications over all the channels you have identified as default channels.

Table 22–3 provides an alphabetical list of operators that are relevant to the attributes Subject, From, Date, and Time and describes the values they require.

Table 22–3 Operators relevant to Subject, From, Date, and Time

Operator	Value ¹	Attributes
Between	In the fields provided: <ul style="list-style-type: none"> ■ For Date, enter a start date and end date between which to apply the filter ■ For Time, select a start time (hours and minutes) and end time between which to apply the filter 	Date, Time
Contains	Enter a string that must be included in the message Subject or return address (From) Separate multiple values with commas.	Subject, From
isEqual	Enter the literal value that must be used for the message Subject, Date, Time, or return address (From)	Subject, From, Date, Time
isGreaterThan	Enter the message delivery date beyond which to apply the filter	Date
isGreaterThanOrEqual	Enter the message delivery date on which to start applying the filter	Date
isLessThan	Enter the message delivery date before which to start applying the filter	Date
isLessThanOrEqual	Enter the message delivery date on which to stop applying the filter	Date
isNotEqual	Enter a literal value that must be ignored for the message Subject, Date, Time, or return address (From)	Subject, From, Date, Time
isWeekday	No value is required. This operator applies to messages sent on weekdays.	Date
isWeekend	No value is required. This operator applies to messages sent on weekends.	Date
NotContains	Enter a string that must be excluded from the message Subject or return address (From). Separate multiple values with commas.	Subject, From

¹ String values are case sensitive. Multiple values in strings must be separated by a comma.

Table 22–4 provides a list of standard notification message subjects and examples of condition formulations.

Tip: Messaging filters are case-sensitive. For example, they differentiate between *Document* and *document*.

You must create a separate condition for each term. For example, when you filter for *Monty gave feedback*, create three conditions—one for each term.

Table 22–4 Standard Notification Message Subjects

Standardized Notification Subject	Example Filter Conditions
<i>userName</i> has invited you to become a connection	<ul style="list-style-type: none"> ■ Subject Contains connection ■ Subject Contains Monty <p>You can set the condition action to route or ignore all messages concerning a named user for any subject that includes a user name.</p>
<i>userName</i> posted message on your message board	<ul style="list-style-type: none"> ■ Subject Contains message ■ Subject Contains board
<i>userName</i> commented on your message board posting	Subject Contains commented
<i>userName</i> likes on your message board posting	Subject Contains likes
<i>userName</i> gave feedback to you	<ul style="list-style-type: none"> ■ Subject Contains gave ■ Subject Contains feedback
Portal Membership Change	Subject isEqual Portal Membership Change
<i>userName</i> created the <i>documentType</i> <i>documentName</i>	<ul style="list-style-type: none"> ■ Subject Contains Document ■ Subject Contains Wiki ■ Subject Contains java.txt ■ Subject Contains Monty
Note: For <i>documentType</i> , either Document or Wiki Document is returned. This means that all file types, except wikis, are identified in the subject as Document.	
<i>userName</i> changed the <i>documentType</i> <i>documentName</i>	<ul style="list-style-type: none"> ■ Subject Contains changed ■ Subject Contains myFile.docx
<i>userName</i> deleted the <i>documentType</i> <i>documentName</i>	<ul style="list-style-type: none"> ■ Subject Contains deleted ■ Subject Contains document ■ Subject isNotEqual java.txt
<i>userName</i> posted a comment on the <i>documentType</i> <i>documentName</i>	<ul style="list-style-type: none"> ■ Subject Contains Monty ■ Subject Contains comment ■ Subject Contains movingforward.docx
<i>userName</i> likes the <i>documentType</i> <i>documentName</i>	<ul style="list-style-type: none"> ■ Subject Contains likes ■ Subject Contains movingforward.docx
<i>userName</i> created the blog post <i>blogName</i>	<ul style="list-style-type: none"> ■ Subject Contains kirk ■ Subject Contains tribbles
<i>userName</i> changed the blog post <i>blogName</i>	Subject NotContains tribbles
<i>userName</i> deleted the blog post <i>blogName</i>	<ul style="list-style-type: none"> ■ Subject Contains deleted ■ Subject Contains blog
<i>userName</i> posted a comment on the blog post <i>blogName</i>	<ul style="list-style-type: none"> ■ Subject Contains comment ■ Subject Contains blog
<i>userName</i> likes the blog post <i>blogName</i>	<ul style="list-style-type: none"> ■ Subject Contains like ■ Subject Contains blog
<i>userName</i> created the forum <i>forumName</i>	<ul style="list-style-type: none"> ■ Subject Contains Monty ■ Subject Contains created ■ Subject Contains forum

Table 22–4 (Cont.) Standard Notification Message Subjects

Standardized Notification Subject	Example Filter Conditions
<i>userName</i> created the discussion topic <i>topicName</i>	<ul style="list-style-type: none"> ■ Subject Contains Monty ■ Subject Contains topic <p>This example affects both <i>created</i> and <i>deleted</i> topics. Consider adding the verb, for example, <i>created</i> or <i>deleted</i>, in the filter condition when you want to make a distinction between the two types of actions.</p> <p>Note, however, that the verb alone is not likely to have the effect you want. For example, if you set the filter condition, Subject Contains deleted, messages for all types of objects upon which a delete action is performed are handled by the filter.</p>
<i>userName</i> replied to the discussion topic <i>topicName</i>	<ul style="list-style-type: none"> ■ Subject Contains replied ■ Subject Contains topic ■ Subject Contains NewTech
<i>userName</i> deleted the discussion topic <i>topicName</i>	<ul style="list-style-type: none"> ■ Subject Contains deleted ■ Subject Contains topic
<i>userName</i> posted a comment on the discussion topic <i>topicName</i>	<ul style="list-style-type: none"> ■ Subject Contains comment ■ Subject Contains topic ■ Subject Contains NewTech
<i>userName</i> likes the discussion topic <i>topicName</i>	<ul style="list-style-type: none"> ■ Subject Contains likes ■ Subject Contains NewTech
<i>userName</i> created the event <i>eventName</i>	<ul style="list-style-type: none"> ■ Subject Contains Java ■ Subject Contains Summit
<i>userName</i> changed the event <i>eventName</i>	<ul style="list-style-type: none"> ■ Subject Contains Java ■ Subject Contains Summit ■ Subject Contains changed
<i>userName</i> deleted the event <i>eventName</i>	<ul style="list-style-type: none"> ■ Date isEqual 5/31/10 ■ Subject Contains event ■ Subject Contains Java ■ Subject Contains Summit <p>On the day of the event, all notifications concerning the Java Summit event are routed to a selected channel. You can omit the term <i>event</i>, and receive other related notifications, such as an announcement concerning Java Summit.</p>
<i>userName</i> created the announcement <i>announcementName</i>	<ul style="list-style-type: none"> ■ Subject Contains created ■ Subject Contains announcement
<i>userName</i> changed the announcement <i>announcementName</i>	<ul style="list-style-type: none"> ■ Subject Contains Monty ■ Subject Contains announcement
<i>userName</i> deleted the announcement <i>announcementName</i>	<ul style="list-style-type: none"> ■ Subject Contains announcement ■ Subject Contains myPortal

22.2.6 Editing Messaging Filters

To edit a messaging filter:

1. Go to the User Messaging Preferences page as described in [Section 22.2.1, "Accessing Messaging Configuration Settings."](#)
2. If necessary, click the **Messaging Filters** tab to bring it forward.
3. Select the filter condition to edit, and click the **Edit** icon.
4. Make your changes.
5. Click **OK** to save and apply your changes.

22.2.7 Deleting Messaging Filters

To delete a messaging filter:

1. Go to the User Messaging Preferences page as described in [Section 22.2.1, "Accessing Messaging Configuration Settings."](#)
2. If necessary, click the **Messaging Filters** tab to bring it forward.
3. Select the filter condition to delete, and click the **Delete** icon.
4. Click **OK** in the resulting Confirmation dialog.

Note: You can remove a filtering condition without deleting the entire filter. Follow the steps in [Section 22.2.6, "Editing Messaging Filters,"](#) and click the **Delete** icon next to the condition to remove.

22.3 Subscribing to the Application, to Portals, and to Objects

Where you perform a subscription varies according to the level at which the subscription is applied as well as the type of object being subscribed to. For example:

- Application-level subscriptions are made through your personal preferences.
- Portal-level subscriptions are made on the portal's right-click menu on the **Portals** page.
- Object-level subscriptions are made on the object itself.

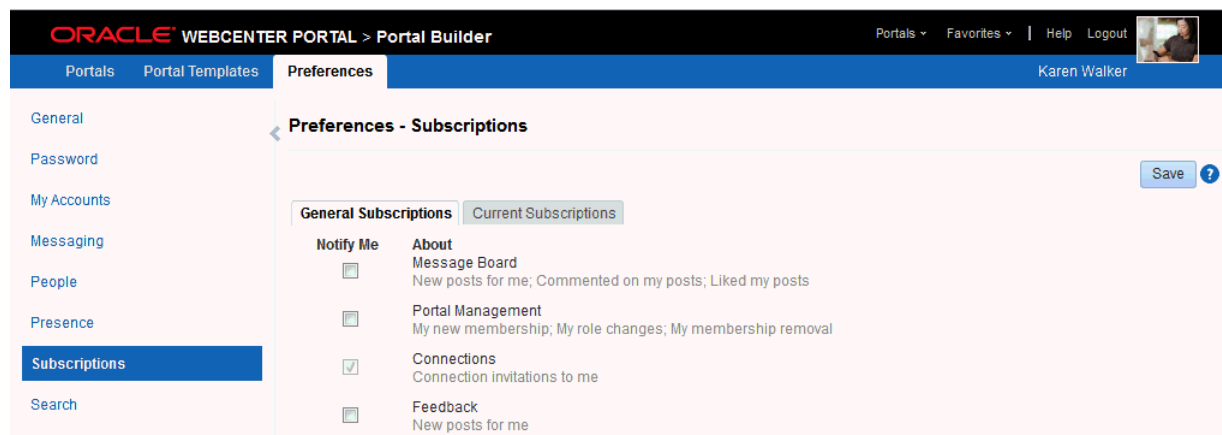
This section steps you through these subscription scenarios. It includes the following subsections:

- [Section 22.3.1, "Setting Application-Level Subscriptions"](#)
- [Section 22.3.2, "Setting Portal-Level Subscriptions"](#)
- [Section 22.3.3, "Setting Object-Level Subscriptions"](#)

22.3.1 Setting Application-Level Subscriptions

Set application-level subscriptions on the **Subscriptions** panel in the Preferences dialog ([Figure 22–8](#)).

Figure 22–8 General Subscriptions Preferences



You can use subscription preferences to specify whether to receive notifications from People Connections for activities related to Connections, Feedback, and Message Board. Additionally, you can use subscriptions preferences to subscribe to portal management activities, such as changes to any of your portal memberships or roles.

Application-level subscriptions are affected by the defaults set by your system administrator. In your view of Preferences, some subscription options may appear but be unavailable, while others may be hidden completely. For more information, see [Section 22.1, "About Subscriptions and Notifications."](#)

To set application-level subscriptions:

1. Click **Preferences**, click **Subscriptions** to open the **Subscriptions** page, and, if necessary, click the **General Subscriptions** tab to bring it forward.
2. Select the check box next to an option for which to receive notifications through mail or other selected channels.

See Also: [Section 22.2, "Establishing and Managing Your Messaging Channels and Filters."](#)

Select from:

- **Message Board** to receive notification when other users post messages to your Message Board, like your posts, and comment on your posts
- **Portal Management** to receive notification when you are added or removed as a member or your role changes
- **Connections** to receive notification when another user invites you to connect
- **Feedback** to receive notification when other users leave feedback for you

Deselect the check box next to the options for which to omit notifications.

3. Click **Save** to apply your changes.

See Also: [Section 22.4.1, "Viewing and Cancelling Application-Level Subscriptions."](#)

22.3.2 Setting Portal-Level Subscriptions

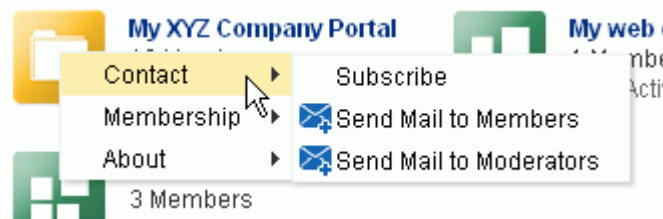
You can use portal-level subscriptions to trigger notification messages whenever any of the following actions occur within the scope of the subscribed portal:

- An announcement is created
- An event is created, updated, or deleted
- A discussion forum or topic is created
- A document is created or uploaded
- A wiki document is created
- A blog entry is posted

To subscribe to a portal:

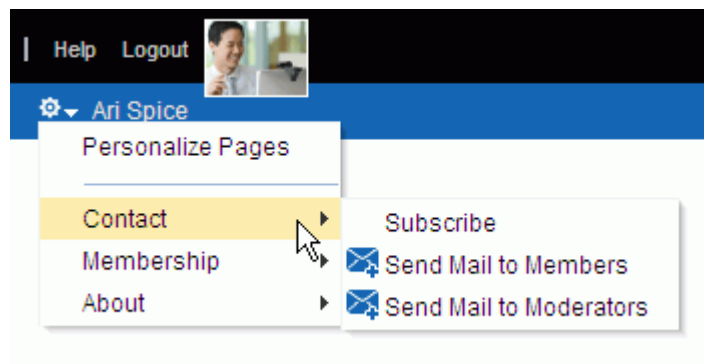
1. Open the Subscribe dialog in either of the following ways:
 - From the **Portals** menu, select **Browse Portals** to display the **Portals** page in the Home portal. Locate the portal to which you want to subscribe, then right-click the portal icon or name, and select **Contact**, then **Subscribe** (Figure 22–9).

Figure 22–9 *Subscribe Options in Portal Actions Menu: Portal Browser*



- When viewing a portal, click the **Actions** menu, and select **Contact**, then **Subscribe**.

Figure 22–10 *Subscribe Option in Portal Actions Menu: Viewing Portal*



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

2. In the Subscribe dialog, select one or more of the following options:

Note: An option appears in this dialog only when the associated feature has been provided in the portal. For example, if the portal moderator has not enabled discussions in the portal, the **Discussions** option does not appear in this dialog.

- **Events**, to receive notice whenever an event is created, updated, or deleted in this portal
- **Documents**, to receive notice whenever a document is created or uploaded in this portal

Tip: To see a more detailed level of notifications regarding a specific document, such as when it is updated, subscribe to the document at the object level. For more information, see [Section 22.3.3.1, "Subscribing to a File, Wiki, or Blog Entry."](#)

- **Blogs**, to receive notice whenever a blog entry is posted in this portal

Tip: To see a more detailed level of notifications regarding a specific blog entry, such as when it is edited, liked, or commented on, subscribe to the blog entry at the object level. For more information, see [Section 22.3.3.1, "Subscribing to a File, Wiki, or Blog Entry."](#)

- **Discussions**, to receive notice whenever a discussion topic is created in this portal

Tip: To see a more detailed level of notifications regarding a specific discussion topic, such as when it is edited, liked, or commented on, subscribe to the topic at the object level. For more information, see [Section 22.3.3.2, "Subscribing to a Discussion Topic."](#)

- **Announcements**, to receive notice whenever an announcement is created in this portal

3. Click **Save** to save your settings and exit the dialog.

After you have subscribed to a portal, the subscription is reflected on the **Current Subscriptions** tab on the **Subscriptions** page of Preferences. From that tab you can view all of your portal- and object-level subscriptions. For more information, see [Section 22.4.2, "Viewing and Cancelling Portal- and Object-Level Subscriptions."](#)

22.3.3 Setting Object-Level Subscriptions

You can use object-level subscriptions to trigger notification messages for actions performed on a selected document, wiki, blog entry, or discussion topic. This section describes how to subscribe to each. It includes the following subsections:

- [Section 22.3.3.1, "Subscribing to a File, Wiki, or Blog Entry"](#)
- [Section 22.3.3.2, "Subscribing to a Discussion Topic"](#)

22.3.3.1 Subscribing to a File, Wiki, or Blog Entry

When you subscribe to a file, wiki, or blog entry, you are notified through your selected messaging channel whenever a user takes action on the object. Depending on the object, you are notified upon different actions:

- For files, you are notified when a user revises or deletes the file, or likes or comments on it.
- For wikis, you are notified when a user performs a major edit on, deletes, likes, or comments on the selected wiki.

Tip: Users can identify a wiki document edit as major, in which case notification is sent. If the edit is not marked as major, no notification is sent.

- For blog entries, you are notified when a user edits, likes, comments on, or deletes the selected blog entry

See Also: [Section 22.2, "Establishing and Managing Your Messaging Channels and Filters."](#)

To subscribe to a file, wiki, or blog entry:

1. Open the file, wiki, or blog entry.
2. From the **File** menu, select **Subscribe**.

See Also: [Section 22.4.2, "Viewing and Cancelling Portal- and Object-Level Subscriptions."](#)

22.3.3.2 Subscribing to a Discussion Topic

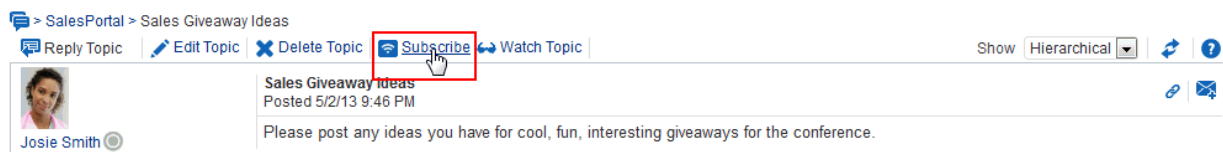
When you subscribe to a discussion topic, you are notified through your selected messaging channel whenever a user, edits, deletes, likes, or comments on the selected discussion topic.

See Also: [Section 22.2, "Establishing and Managing Your Messaging Channels and Filters."](#)

To subscribe to a discussion topic:

1. Go to the discussion topic you want to subscribe to.
2. Click the **Subscribe** link at the top of the topic ([Figure 22–11](#)).

Figure 22–11 *Subscribe Link on a Discussion Topic*



See Also: [Section 22.4.2, "Viewing and Cancelling Portal- and Object-Level Subscriptions."](#)

22.4 Viewing and Cancelling Your Subscriptions

Where you view and cancel your current subscriptions depends on the level of the subscription:

- In addition to making application-level subscriptions, you can view and cancel application-level subscriptions on the **General Subscriptions** tab on the **Subscriptions** page in Preferences.

- View and cancel portal- and object-level subscriptions on the **Current Subscriptions** tab on the **Subscriptions** page in Preferences.

Tip: The settings available on the **Current Subscriptions** tab are also provided through the Subscriptions Viewer. For more information, see [Section 22.1, "About Subscriptions and Notifications."](#)

This section provides information about how to view and cancel your application-level subscriptions and how to view and cancel your portal- and object-level subscriptions. It includes the following subsections:

- [Section 22.4.1, "Viewing and Cancelling Application-Level Subscriptions"](#)
- [Section 22.4.2, "Viewing and Cancelling Portal- and Object-Level Subscriptions"](#)

22.4.1 Viewing and Cancelling Application-Level Subscriptions

View and cancel application-level subscriptions through Preferences or through the Subscription Preferences viewer (for more information, see [Section 22.1, "About Subscriptions and Notifications"](#)).

To view or cancel application-level subscriptions:

1. Click **Preferences**, click **Subscriptions** to open the **Subscriptions** page, and, if necessary, click the **General Subscriptions** tab to bring it forward.

Here you can readily view and change your current application-level subscriptions.

2. To cancel a subscription, deselect its check box.

22.4.2 Viewing and Cancelling Portal- and Object-Level Subscriptions

Both portal- and object-level subscriptions are listed in Preferences on the **Subscriptions** page. Use the controls on the **Current Subscriptions** tab to adjust your view of these subscriptions and to cancel (or unsubscribe from) a portal- or object-level subscription.

Tip: Portal- and object-level subscriptions can be cancelled through the same action you took to create the subscription. At the portal- and object-levels, subscription options toggle between subscribed and unsubscribed. Follow the steps outlined in [Section 22.3.2, "Setting Portal-Level Subscriptions"](#) and [Section 22.3.3, "Setting Object-Level Subscriptions,"](#) but select to unsubscribe instead.

Tip: The settings available on the **Current Subscriptions** tab are also provided in the Subscriptions Viewer. For more information, see [Section 22.1, "About Subscriptions and Notifications."](#)

To view and cancel portal- and object-level subscriptions:

1. Click **Preferences**, then click **Subscriptions** to open the **Subscriptions** page, and, if necessary, click the **Current Subscriptions** tab to bring it forward.
2. Use the **View** menu to control the display order of columns and to hide or show individual columns.
3. To cancel or unsubscribe from a portal- or object-level subscription, select the subscription, and click **Unsubscribe**.

4. In the resulting Unsubscribe Notification Subscription dialog, click **Unsubscribe**.
The selected subscription no longer appears on the list of subscriptions.
5. Click **Save** to save your changes.

Exploring Recommendations and Content

This chapter describes how to work with the recommendations for people, portals, and content that are generated through your activities in WebCenter Portal.

This chapter includes the following topics:

- [Section 23.1, "About Recommendations and Content"](#)
- [Section 23.2, "Working with Connection Recommendations"](#)
- [Section 23.3, "Working with Similar Portals"](#)
- [Section 23.4, "Working with Similar Items"](#)
- [Section 23.5, "Working with Top Items"](#)
- [Section 23.6, "Working with Top Contributions"](#)

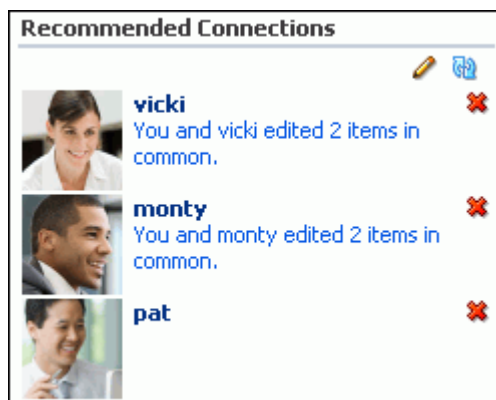
Permissions: The tasks described in this chapter are available to any WebCenter Portal user with access to a page that contains activity graph recommendations.

23.1 About Recommendations and Content

The activity graph serves up its recommendations in the following ways:

- **Recommended Connections**
Use recommended connections ([Figure 23-1](#)) to view and connect with users similar to you.

Figure 23-1 Recommended Connections



See Also: [Section 23.2, "Working with Connection Recommendations"](#)

- **Similar Portals**

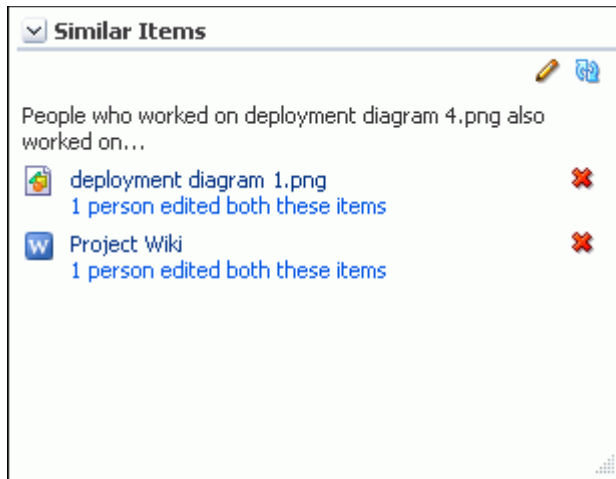
Use Similar Portals to identify and interact with portals that may be of interest to you. For example, people who worked on that portal also worked on these other portals.

See Also: [Section 23.3, "Working with Similar Portals"](#)

- **Similar Items**

Use Similar Items ([Figure 23–2](#)) to identify and interact with WebCenter Portal content that may be of interest to you.

Figure 23–2 *Similar Items*

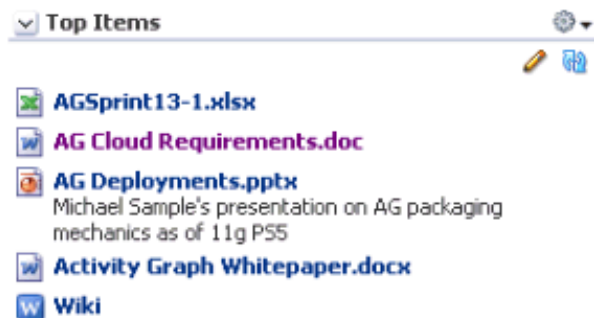


See Also: [Section 23.4, "Working with Similar Items"](#)

- **Top Items**

Use Top Items ([Figure 23–3](#)) to view and interact with the WebCenter Portal items (documents, wikis, or blogs) the activity graph has calculated to be most active in the current portal.

Figure 23–3 *Top Items*



See Also: [Section 23.5, "Working with Top Items"](#)

- **Top Contributions**

Use Top Contributions ([Figure 23–4](#)) to view and interact with the WebCenter Portal items (documents, wikis, or blogs) the activity graph has calculated to be the most active by the current user.

Figure 23–4 *Top Contributions*



See Also: [Section 23.6, "Working with Top Contributions"](#)

Note: The activity graph displays recommendations only if it is configured in your application.

The recommendations provided 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.

23.2 Working with Connection Recommendations

Recommended connections let you view and connect to people considered to be similar to you.

This section includes the following subsections:

- [Section 23.2.1, "Learning More About a Recommended Connection"](#)
- [Section 23.2.2, "Inviting a Recommended Connection to Connect with You"](#)
- [Section 23.2.3, "Removing a User from Your Recommended Connections"](#)
- [Section 23.2.4, "Setting the Number of Users to Display in Recommended Connections"](#)
- [Section 23.2.5, "Controlling Which Users to Include in Recommended Connections"](#)

See Also: [Section 11, "Managing Your Contacts"](#)

23.2.1 Learning More About a Recommended Connection

Before you connect with someone new, you probably want to find out a bit more about that person to determine whether it is really a connection that you want to make. Recommended connections enables this by providing access to the user profile information and by including reasons why the recommendation has been made.

To view information about a recommended connection:

1. Go to a recommended connection.

Tip: By default, you can find recommended connections on the **Profile** page in your Home portal.

2. Each recommended connection includes the name, title, and profile icon of the user. This provides a snapshot to help you decide quickly if you want to connect to this person.
3. To find out more information about the user, click name of the user to display the User Detail popup.

Note: Alternatively, you can click the user icon to display the user's Profile Gallery.

4. In the User Detail popup (Figure 23–5), you can view additional information about the user, such as his or her location and current status. You can also select to view the full profile or contact the user by email or instant message.

Figure 23–5 The User Detail Popup



Note: The information in the User Detail popup depends on the information that the user has provided in their profile, and the tools/services that are enabled in the portal.

5. Click anywhere away from the popup to close it.
6. You may see a reason why each person was recommended as a potential connection. For example, you may be connected to some of the same people or you may have worked on the same documents or wikis.

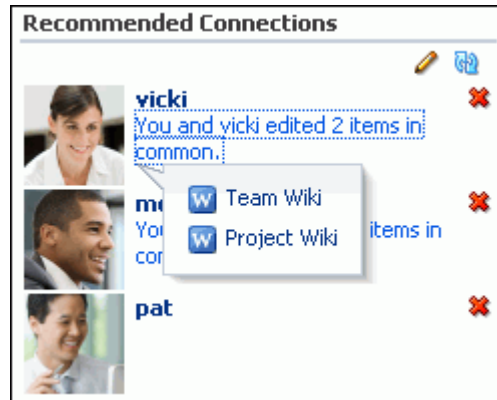
Reasons for recommending a connection are:

- You share connections with the user
- You and the user edited one or more of the same items

- You and the user worked in one or more of the same portals
- You and the user tagged one or more of the same items

Click the reason to find out more details. For example, a list of the connections you have in common, or a list of the objects that you have both worked on (Figure 23–6).

Figure 23–6 Details for Reasons for Recommended Connections



7. Click anywhere away from the popup to close it.
8. After examining this information you can decide whether to connect to this person, or remove him or her from the list of recommended connections.

23.2.2 Inviting a Recommended Connection to Connect with You

If you find a person in the list of recommended connections that you want to connect with, you can do so quickly from the User Detail popup or the user's Profile Gallery.

To invite a recommended connection to connect with you:

1. Go to a recommended connection.

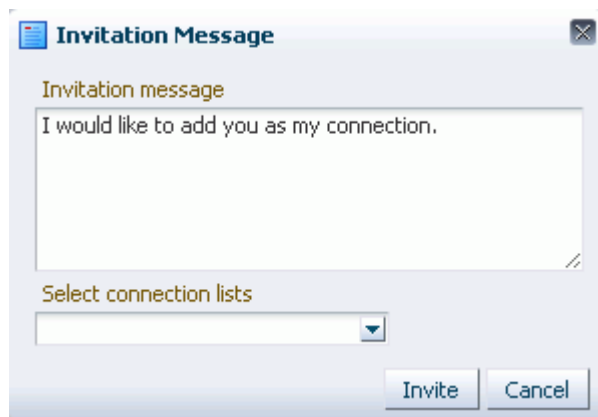
Tip: By default, you can find recommended connections on the **Profile** page in your Home portal.

2. Find the person in the list of recommended connections.
3. Click the name of the user to display the User Detail popup, or the user icon to display the user's Profile Gallery.
4. Click **Get Connected** (Figure 23–7).

Figure 23–7 The Get Connected Link



5. In the Invitation Message dialog (Figure 23–8), enter your own message or keep the default.

Figure 23–8 The Invitation Message Dialog

- From the **Select connection lists** dropdown list, select the connection list to which you want to add this user.

See Also: [Section 11, "Managing Your Contacts"](#)

- Click **Invite**.

If the person you have invited set Preferences to automatically accept all invitations, you are connected immediately. Otherwise, the invitation becomes available in the recipient's Connections page.

23.2.3 Removing a User from Your Recommended Connections

If the list of recommended connections includes people that you do not want to connect with, you can remove them, making space for more recommendations. You might also select to remove someone after you have issued them an invitation to connect. If you do so, the recommendation is removed from the list, but the invitation is not canceled.

To remove a recommended connection:

- Go to a recommended connection.

Tip: By default, you can find recommended connections on the **Profile** page in your Home portal.

- Find the person in the list of recommended connections.
- Click the **Do not show this person** icon next to the user in the list ([Figure 23–9](#)).

Figure 23–9 The Do Not Show This Person Icon

- The list is refreshed with a new recommended connection taking the place of the one you removed.

23.2.4 Setting the Number of Users to Display in Recommended Connections

You can control the number of users that are displayed in recommended connections.

To set the number of recommended connections to display:

1. Go to recommended connections.

Tip: By default, you can find recommended connections on the **Profile** page in your Home portal.

2. Click the **Display Options** icon.
3. In the Display Options dialog, in the **Number of People** field (Figure 23–10), enter how many recommended connections you want to see. The default value is 5.

Figure 23–10 The Number of People Field



4. Click **OK**.

23.2.5 Controlling Which Users to Include in Recommended Connections

By default, recommended connections includes all recommended connections except those with whom you are already connected. You can change this setting by editing the display options. For example, you could show users who are similar to you, rather than to show recommended connections. In this case, you might want to include existing connections.

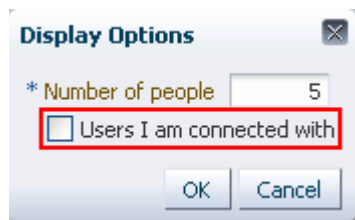
To control which users to include:

1. Go to a recommended connection.

Tip: By default, you can find recommended connections on the **Profile** page in your Home portal.

2. Click the **Display Options** icon.
3. In the Display Options dialog, select the **Users I am connected with** check box (Figure 23–11) to include users in the list of recommended connections even if you are already connected with them.

Deselect the check box to remove users from the list if you are already connected with them.

Figure 23–11 *The Users I Am Connected With Option*

Note: This check box is *not* selected by default.

4. Click OK.

23.3 Working with Similar Portals

Similar Portals provide you with recommendations of other portals that are similar to the one you are currently viewing. A portal is considered similar to another portal if the same people interact with it, especially if they edit the content.

Only portals that you are permitted to view are listed in the Similar Portals.

Note: The recommendations made in the Similar Portals are determined based on the currently viewed portal only; they are not specific to the current user.

This section includes the following subsections:

- [Section 23.3.1, "Learning More About a Suggested Portal"](#)
- [Section 23.3.2, "Joining a Suggested Portal"](#)
- [Section 23.3.3, "Removing a Portal from the Suggested Portals"](#)
- [Section 23.3.4, "Setting the Number of Portals to Display in the Similar Portals"](#)
- [Section 23.3.5, "Controlling Which Portals to Include in the Similar Portals"](#)

23.3.1 Learning More About a Suggested Portal

When looking at a portal through Similar Portals, one of the first things you probably want to do is find out more about that portal. This helps you determine whether the portal is one that you are interested in joining or not.

To learn more about a suggested portal:

1. Go to the list of Similar Portals that includes the portal about which you want to learn more.
2. Each suggested portals includes the name and description of the portal. This provides a snapshot to help you decide quickly if the portal is one that you might be interested in.
3. To go to the portal to find out more about it, click the name.
4. Examine the contents of the portal to determine if you are interested in it.
5. After examining the portal you can decide whether to join the portal or remove it.

23.3.2 Joining a Suggested Portal

If you find a portal through Similar Portals that you want to join, you can do so by visiting the portal.

To join a suggested portal:

1. Go to the list of similar portals that includes the portal that you want to join.
2. Find the portal that you want to join.
3. Click the portal name to open the portal.
4. In the portal, subscribe to the portal. Some membership requests require approval from the portal moderator so you may not gain access immediately.

See Also: [Section 10.10, "Joining a Portal"](#)

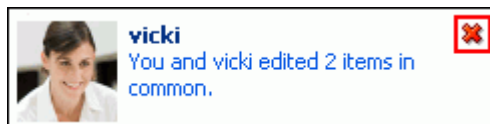
23.3.3 Removing a Portal from the Suggested Portals

If you decide that you are not particularly interested in a portal listed in the similar portals, you can remove it, making space for more recommendations. The portal is removed only from your view; the portal continues to be listed for other users, as long as they have permission to view it.

To remove a portal from the list of similar portals:

1. Go to the list of similar portal that includes the portal you want to remove.
2. Find the portal that you want to remove.
3. Click the **Do no show this portal** icon next to the portal ([Figure 23–12](#)).

Figure 23–12 *The Do Not Show This Portal Icon*



4. The list is refreshed with a new similar portal taking the place of the one you removed.

23.3.4 Setting the Number of Portals to Display in the Similar Portals

You can control the number of portals that are displayed in the Similar Portals.

To set the number of similar portals to display:

1. Go to the list of similar portals that you want to edit.
2. Click the **Display Options** icon.
3. In the Display Options dialog, in the **Number of Portals** field, enter how many similar portals you want to list. The default value is 5.
4. Click **OK**.

23.3.5 Controlling Which Portals to Include in the Similar Portals

By default, Similar Portals does not include portals that you are already a member of, but it does include portals that you have already viewed. You can change these settings by editing the display options.

To which portals to include:

1. Go to the list of Similar Portals that you want to edit.
2. Click the **Display Options** icon.
3. In the Display Options dialog, select the **Show portals I have worked on before** check box to display portals in which you have performed an action (excluding viewing) in the list of similar portals.

Deselect the check box if you do not want to include portals that you have worked on.

Note: This check box is *not* selected by default.

4. Select the **Show portals I have visited before** check box to include portals in the list of similar portals even if you have already viewed them.

Deselect the check box to remove portals from the list if you have already viewed them.

Note: This check box is selected by default.

5. Click OK.

23.4 Working with Similar Items

Similar Items provides you with recommendations of other items you might want to view, based on the item you have currently selected on the page.

Note: The recommendations made in Similar Items are determined based on the currently selected item only; they are not specific to the current user.

This section includes the following subsections:

- [Section 23.4.1, "Populating the Similar Items"](#)
- [Section 23.4.2, "Viewing a Suggested Item"](#)
- [Section 23.3.3, "Removing a Portal from the Suggested Portals"](#)
- [Section 23.3.4, "Setting the Number of Portals to Display in the Similar Portals"](#)
- [Section 23.3.5, "Controlling Which Portals to Include in the Similar Portals"](#)

23.4.1 Populating the Similar Items

Similar Items lists items that are similar to the currently selected item on the page. To populate Similar Items, you must select an item for which you want to see similar items.

Note: If the page containing the similar items also contains the Document Viewer, the document currently displayed in the Document Viewer drives the content of the Similar Items and you do not need to explicitly select an item.

To populate the Similar Items:

1. Go to the page containing the Similar Items.
2. In one of the other components on the page, select the item for which you want to see similar items.

Similar items works in conjunction with the following components:

- Documents components:
 - Recent Documents
 - Document List Viewer
 - Document Navigator
 - Document Explorer
 - Folder Viewer
 - Document Manager
 - Document Browser
 - Discussions (If your system administrator or application specialist specified a discussions resource ID for similar items).
3. Similar items refreshes to display items that are similar to the one you selected.

23.4.2 Viewing a Suggested Item

If you see an item in the similar items that you think might be useful, you can go ahead and view it.

To view a suggested item:

1. Go to the list of similar items that includes the item that you want to view.
2. Click the item's name to display the item.

The way the item is displayed depends on the type of item. For example, documents are displayed in the Document Viewer.

23.4.3 Removing an Item from Similar Items

If you decide that you are not particularly interested in an item listed in the similar items, you can remove it, making space for more recommendations. The item is removed only from your view; the item continues to be listed for other users, as long as they have permission to view it.

To remove an item:

1. Go to the list of similar items that includes the item that you want to remove.
2. Find the item that you want to remove.
3. Click the Do not show this item icon next to the item (Figure 23–13).

Figure 23–13 The Do Not Show This Item Icon

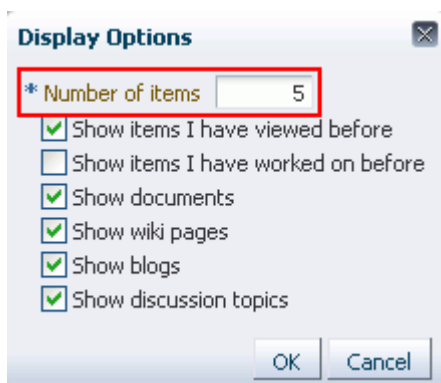
4. The list is refreshed with a new similar item taking the place of the one you removed.

23.4.4 Setting the Number of Items to Display in the Similar Items

You can control the number of items that are displayed in the Similar Items.

To set the number of items to display:

1. Go to the list of similar items that you want to edit.
2. Click the **Display Options** icon.
3. In the Display Options dialog, in the **Number of items** field (Figure 23–14), enter how many similar items you want to list. The default value is 5.

Figure 23–14 The Number of Items Field

4. Click OK.

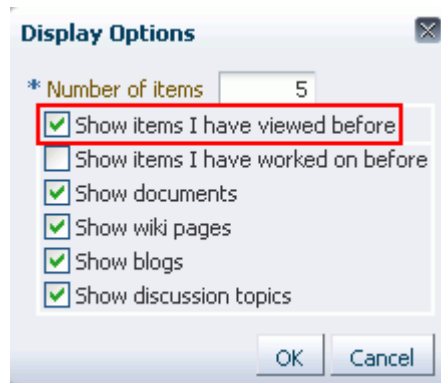
23.4.5 Controlling Which Items to Include in Similar Items

By default, the list of similar items include items that you have already viewed. It also includes all types of supported items (documents, wiki pages, blogs, and discussion topics). You can change these settings by editing the display options. For example, you could show only discussion topics that are similar to the selected item.

To control which items to include:

1. Go to the list of similar items that you want to edit.
2. Click the **Display Options** icon.
3. In the Display Options dialog, select the **Show items I have viewed before** check box (Figure 23–15) to include items in the list of similar items even if you have already viewed them.

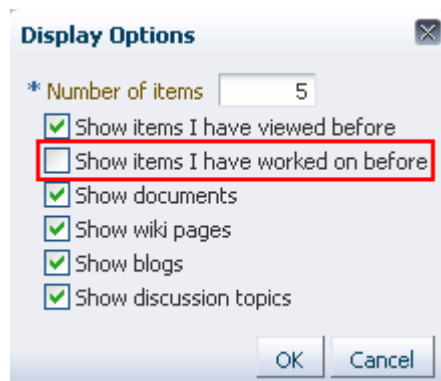
Deselect the check box to remove items from the list of similar items if you have already viewed them.

Figure 23–15 The Show Items I Have Viewed Before Option

Note: This check box is selected by default.

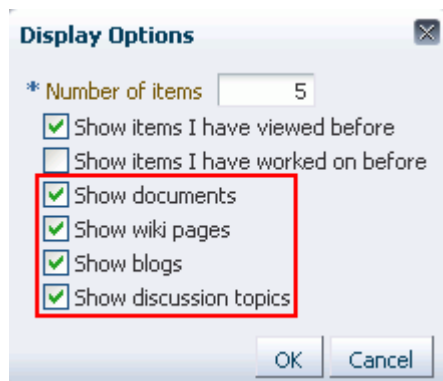
4. Select the **Show items I have worked on before** check box to include items in the list of similar items even if you have already interacted with them in some way (other than viewing).

Deselect the check box to remove items from the list of similar items if you have interacted with them already.

Figure 23–16 The Show Items I Have Worked on Before Option

Note: This check box is *not* selected by default.

5. Select or deselect the following check boxes as required to determine which types of items to display (Figure 23–17):
 - Show documents
 - Show wiki pages
 - Show blogs
 - Show discussion topics

Figure 23–17 Options for Displaying Different Types of Items

Note: These check boxes are selected by default.

6. Click OK.

23.5 Working with Top Items

Top items provide recommendations of other items you might want to view, based on the most active items in that portal.

Select an item from the list to view it. The way the item is displayed depends on the type of item. For example, documents are displayed in the Document Viewer.

Note: The recommendations made in Top Items are determined based on the current portal only; they are not specific to the current user.

This section includes the following subsections:

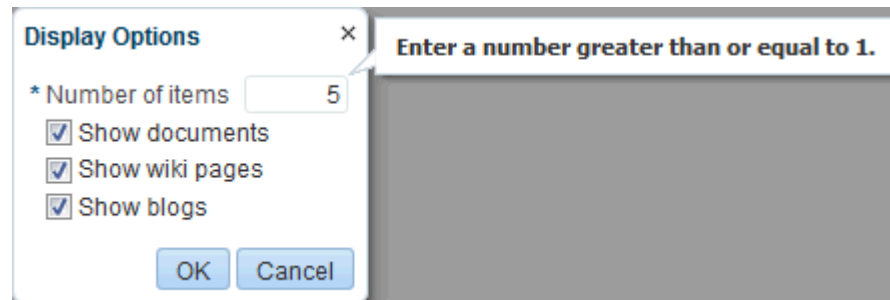
- [Section 23.5.1, "Setting the Number of Items to Display in the Top Items"](#)
- [Section 23.5.2, "Controlling Which Items to Include in Top Items"](#)

23.5.1 Setting the Number of Items to Display in the Top Items

You can control the number of items that are displayed in the list of top items.

To set the number of items to display:

1. Go to the list of top items that you want to edit.
2. Click the **Display Options** icon.
3. In the Display Options dialog, in the **Number of items** field ([Figure 23–18](#)), enter how many top items you want to list. The default value is 5.

Figure 23–18 *The Number of Items Field*

4. Click OK.

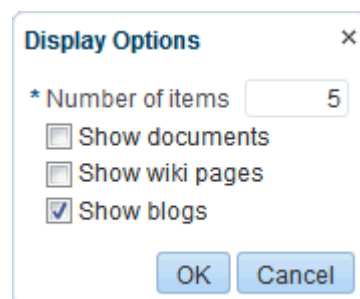
23.5.2 Controlling Which Items to Include in Top Items

By default, the list of top items includes all types of supported items (documents, wiki pages, blogs). You can change these settings by editing the display options. For example, you could show only blogs.

To control which items to include:

1. Go to the list of top items that you want to edit.
2. Click the **Display Options** icon.
3. Select or deselect the following check boxes as required to determine which types of items to display (Figure 23–19):
 - Show documents
 - Show wiki pages
 - Show blogs

Note: These check boxes are selected by default.

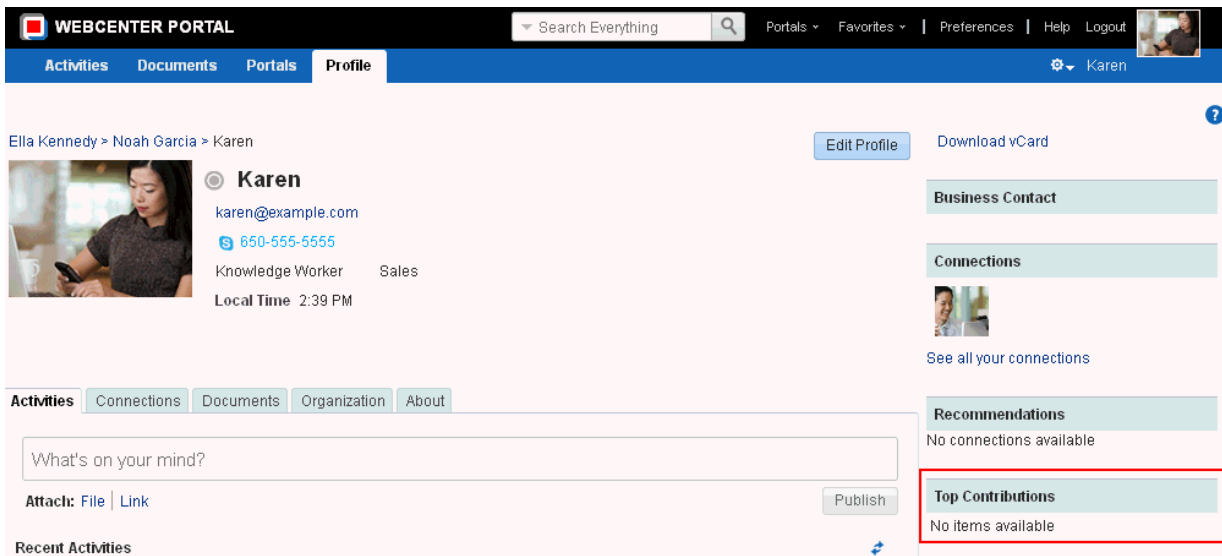
Figure 23–19 *Display Options Showing Only Blogs*

4. Click OK.

23.6 Working with Top Contributions

Top contributions let you view the most active items contributed by the current user. Top contributions are listed on a user's **Profile** Gallery.

Figure 23–20 Top Contributions on the Profile Page



Click a top contribution to view it, and click anywhere away from the popup to close it.

This section includes the following subsections:

- [Section 23.6.1, "Setting the Number of Users to Display in Top Contributions"](#)
- [Section 23.6.2, "Controlling Which Items to Include in Top Contributions"](#)

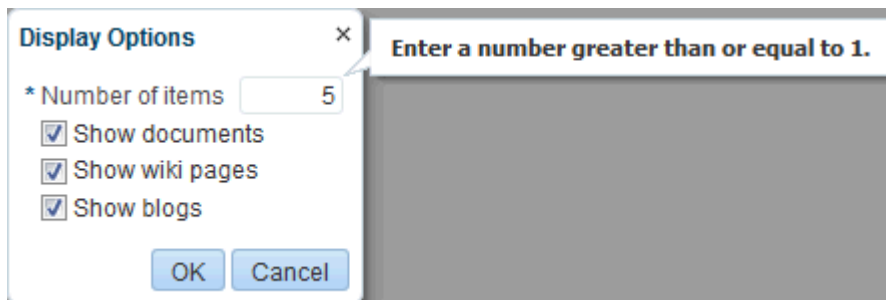
23.6.1 Setting the Number of Users to Display in Top Contributions

You can control the number of items that are displayed in top contributions.

To set the number of top contributions to display:

1. Go to the list of top contributions.
2. Click the **Display Options** icon.
3. In the Display Options dialog, in the **Number of items** field (Figure 23–21), enter how many recommended connections you want to see. The default value is 5.

Figure 23–21 The Number of Items Field



4. Click **OK**.

23.6.2 Controlling Which Items to Include in Top Contributions

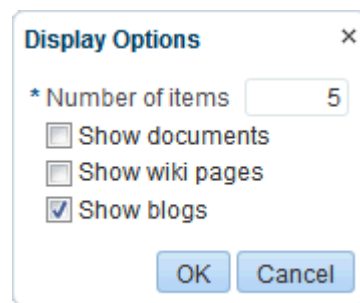
By default, the list of top contributions includes all types of supported items (documents, wiki pages, blogs). You can change these settings by editing the display options. For example, you could show only blogs.

To control which items to include:

1. Go to the list of top items that you want to edit.
2. Click the **Display Options** icon.
3. Select or deselect the following check boxes as required to determine which types of items to display (Figure 23–22):
 - Show documents
 - Show wiki pages
 - Show blogs

Note: These check boxes are selected by default.

Figure 23–22 *Display Options Showing Only Blogs*



4. Click **OK**.

Tracking Portal Activities

This chapter describes how to work with Activity Stream and Recent Activities to track and report on activities in WebCenter Portal. Tracking and reporting assist you in keeping up with the latest portal activities.

This chapter includes the following topics:

- [Section 24.1, "Comparison of Activity Stream and Recent Activities"](#)
- [Section 24.2, "About the Activity Stream"](#)
- [Section 24.3, "Setting Activity Stream Preferences"](#)
- [Section 24.4, "Working with the Activity Stream"](#)
- [Section 24.5, "About Recent Activities"](#)
- [Section 24.6, "Working with Recent Activities"](#)

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

24.1 Comparison of Activity Stream and Recent Activities

Activity Stream and Recent Activities both track and report on activities in WebCenter Portal, enabling you 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.

24.2 About the Activity Stream

In WebCenter Portal, Activity Stream provides a streaming view of the activities of your connections, actions taken in portals, and business activities. For example, Activity Stream can note when you or a connection posts feedback, uploads a document, or creates a discussion forum. Additionally, it streams messages and attachments entered through Publisher.

See Also: For information about Publisher, see [Chapter 15, "Liking, Commenting On, and Sharing Items in WebCenter Portal."](#)

Through Activity Stream Preferences, you can select to show connection and portal activities. (However, your system administrator can disable users from overriding application-level settings.)

In addition to streaming messages, your Activity Stream can provide access to file attachments and web links added through Publisher. 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 only if your system administrator configured WebCenter Portal to preview PDFs.

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. Your administrator can configure Activity Stream to omit file previews.

Users can share a streamed activity and its attachments using a **Share** feature, available on each streamed item.

See Also: For information about sharing, see [Section 24.4.7, "Sharing Files and other Objects Through an Activity Stream Item."](#)

[Table 24–1](#) lists and describes the types of activities that are reported through Activity Stream.

Note: Deleted 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 24–1 Activities Tracked by Activity Stream

Tools/Service	Tracked Activities	Scope	Activities Shared or Private
Announcements	<ul style="list-style-type: none"> ■ Create announcement ■ Edit announcement 	<ul style="list-style-type: none"> ■ portal 	<ul style="list-style-type: none"> ■ Shared with other portal members
Blogs	<ul style="list-style-type: none"> ■ Create blog ■ Update blog 	<ul style="list-style-type: none"> ■ portal ■ Home portal 	<ul style="list-style-type: none"> ■ Activities on portal blogs are shared with other portal members. ■ Activities on Home portal blogs are shared with the blogger's connections.
Connections	<ul style="list-style-type: none"> ■ Invite to connect ■ Connection invite accepted 	<ul style="list-style-type: none"> ■ Home portal 	<ul style="list-style-type: none"> ■ Shared with invitor and invitee's connections
Discussions	<ul style="list-style-type: none"> ■ Create forum ■ Create topic ■ Reply to topic 	<ul style="list-style-type: none"> ■ portal 	<ul style="list-style-type: none"> ■ Shared with other portal members
Documents	<ul style="list-style-type: none"> ■ Create document ■ Edit document ■ Add tag ■ Remove tag 	<ul style="list-style-type: none"> ■ portal ■ Home portal 	<ul style="list-style-type: none"> ■ Activities on portal documents are shared with other portal members. ■ Activities on Home portal documents are private to user.
Feedback	<ul style="list-style-type: none"> ■ Leave feedback ■ Receive feedback 	<ul style="list-style-type: none"> ■ Home portal 	<ul style="list-style-type: none"> ■ Shared with whomever is permitted to view such activities (for more information, see this section and Section 14.1, "About Feedback.")
Lists	<ul style="list-style-type: none"> ■ Create a list 	<ul style="list-style-type: none"> ■ portal 	<ul style="list-style-type: none"> ■ Shared with other portal members
Message Board	<ul style="list-style-type: none"> ■ Leave message ■ Receive message 	<ul style="list-style-type: none"> ■ Home portal 	<ul style="list-style-type: none"> ■ Shared with whomever is permitted to view such activities (for more information, see this section and Section 14.7, "Setting Message Preferences.")
Pages	<ul style="list-style-type: none"> ■ Create page ■ Edit page ■ Add tag ■ Remove tag 	<ul style="list-style-type: none"> ■ portal ■ Home portal 	<ul style="list-style-type: none"> ■ Activities on portal pages are shared with other portal members. ■ Activities on Home portal pages are private to user.
Profiles	<ul style="list-style-type: none"> ■ Update photo ■ Update profile ■ Update personal status 	<ul style="list-style-type: none"> ■ Home portal 	<ul style="list-style-type: none"> ■ Shared with whomever is permitted to view such activities (for more information, see this section and Section 6.4, "Setting Profile Preferences.")

Table 24–1 (Cont.) Activities Tracked by Activity Stream

Tools/Service	Tracked Activities	Scope	Activities Shared or Private
Portal Events	<ul style="list-style-type: none"> ■ Create an event ■ Edit an Event 	<ul style="list-style-type: none"> ■ portal 	<ul style="list-style-type: none"> ■ Shared with other portal members
Portals Management	<ul style="list-style-type: none"> ■ Create portal ■ Change portal membership ■ Join portal ■ Post comment ■ Like item ■ Update portal configuration ■ Enable portal tool or service ■ Disable portal tool or service ■ Change custom portal attribute ■ Change portal role permissions ■ Change portal role assignment 	<ul style="list-style-type: none"> ■ portal 	<ul style="list-style-type: none"> ■ Shared with other portal members
Tagging	<ul style="list-style-type: none"> ■ Add tag ■ Remove tag 	<ul style="list-style-type: none"> ■ portal ■ Home portal 	<ul style="list-style-type: none"> ■ Activities in a portal are shared with all portal members. ■ Activities in a Home portal are shared with whomever is permitted to view such activities (for more information, see Section 24.3, "Setting Activity Stream Preferences").

Use Activity Stream Preferences to specify who can view your Activity Stream and the types of activities to show. For more information about Preferences relating to Activity Stream, see [Section 24.3, "Setting Activity Stream Preferences."](#)

Your system administrator can hide or show various controls on Activity Stream viewers and limit the types of activities and the specific portals that are tracked.

WebCenter Portal provides the following Activity Stream viewers:

- **Activity Stream** for viewing application activities and the activities of your connections and for providing access to the attachments added through the **Share** link ([Figure 24–1](#))

Figure 24–1 Activity Stream Viewer

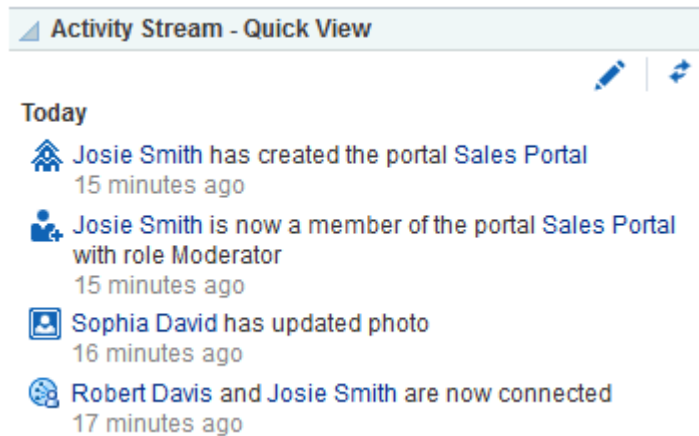
The screenshot displays the 'Activity Stream' interface for the 'Philatelists' portal. At the top, there is a header 'Activity Stream' with a dropdown arrow. Below the header, the text 'Recent Activities' is followed by a 'Date Range' selector set to '7 Days', and an 'Options' button with a refresh icon. The main content area lists five activities, each with a user profile picture, the user's name, the action performed, and the target object. The activities are: 1. Karen Walker changed the page Home (1 minute ago). 2. Karen Walker changed the document lincolnstampsheet.jpg (11 minutes ago). 3. Karen Walker modified settings for portal Philatelists (Yesterday). 4. Ari Spice changed the page Meetings (6/28/13). 5. Ari Spice created the wiki Meeting Minutes June 2013 (6/28/13). Each activity has links for 'Comment', 'Like', and 'Share'. A 'More...' link is located at the bottom right of the activity list.

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 Publisher with the Activity Stream viewer.

See Also: For information about Publisher, see [Section 15.7.1, "About Publisher."](#)

- **Activity Stream - Quick View** provides a summary view of application activities and the activities of your connections ([Figure 24–2](#)).

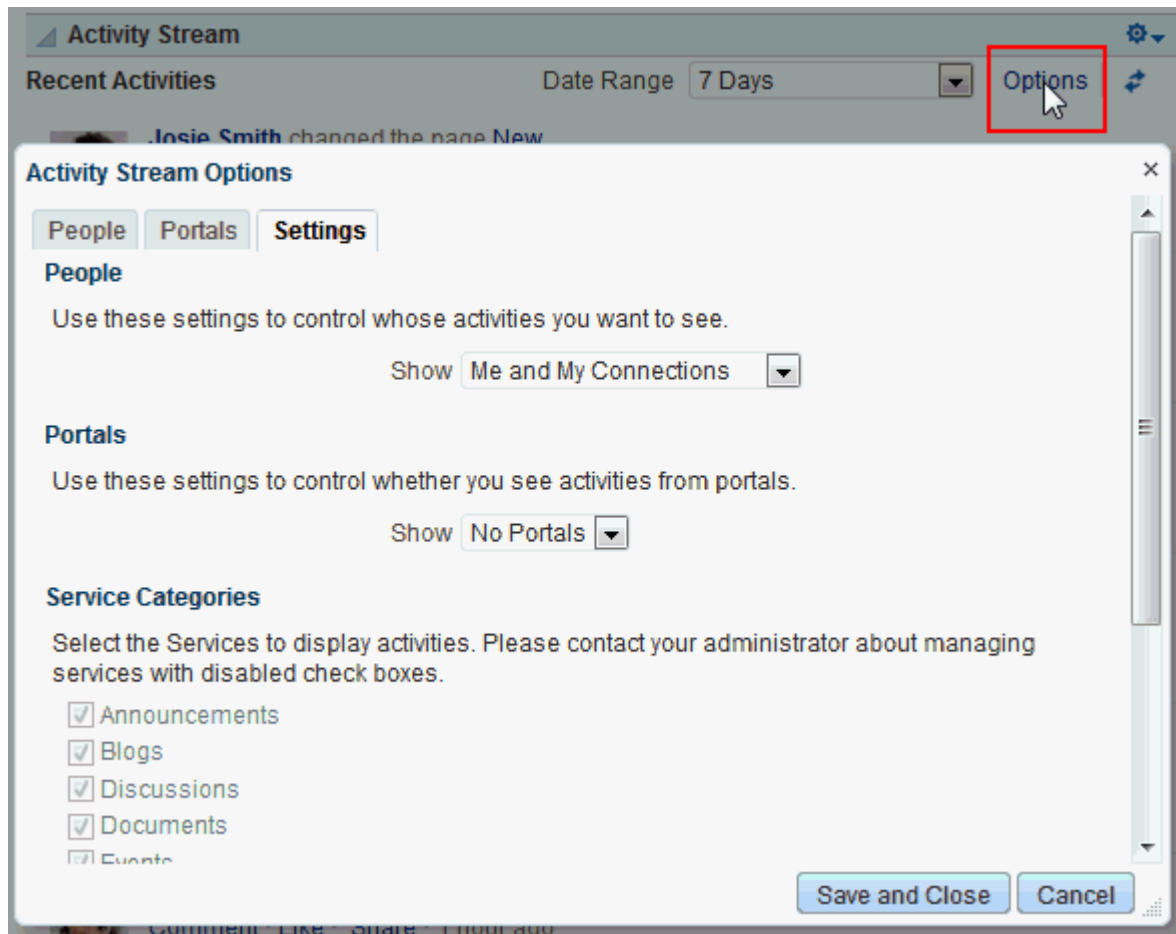
Figure 24–2 Activity Stream - Quick View

Unlike the full view of Activity Stream, Activity Stream - Quick View does not display **Like**, **Comment**, and **Share** links. The Activity Stream - Quick View also combines similar activities into one entry. For example, if a user posts two documents, you see one entry that lists both documents; if a user posts two messages, you see one entry that says the user "posted messages," but only the most recent message is shown.

A hierarchy of configuration settings control what you can do with your view of the Activity Stream. Your system administrator sets application-wide values on the **Administration** page. You can set your own personal values through People Connections Preferences. Your system administrator can set values on a given viewer instance, which affect all users' views of the viewer instance (application customization). You can set values on a given viewer instance, which affect only your view of the Activity Stream viewer (user customization).

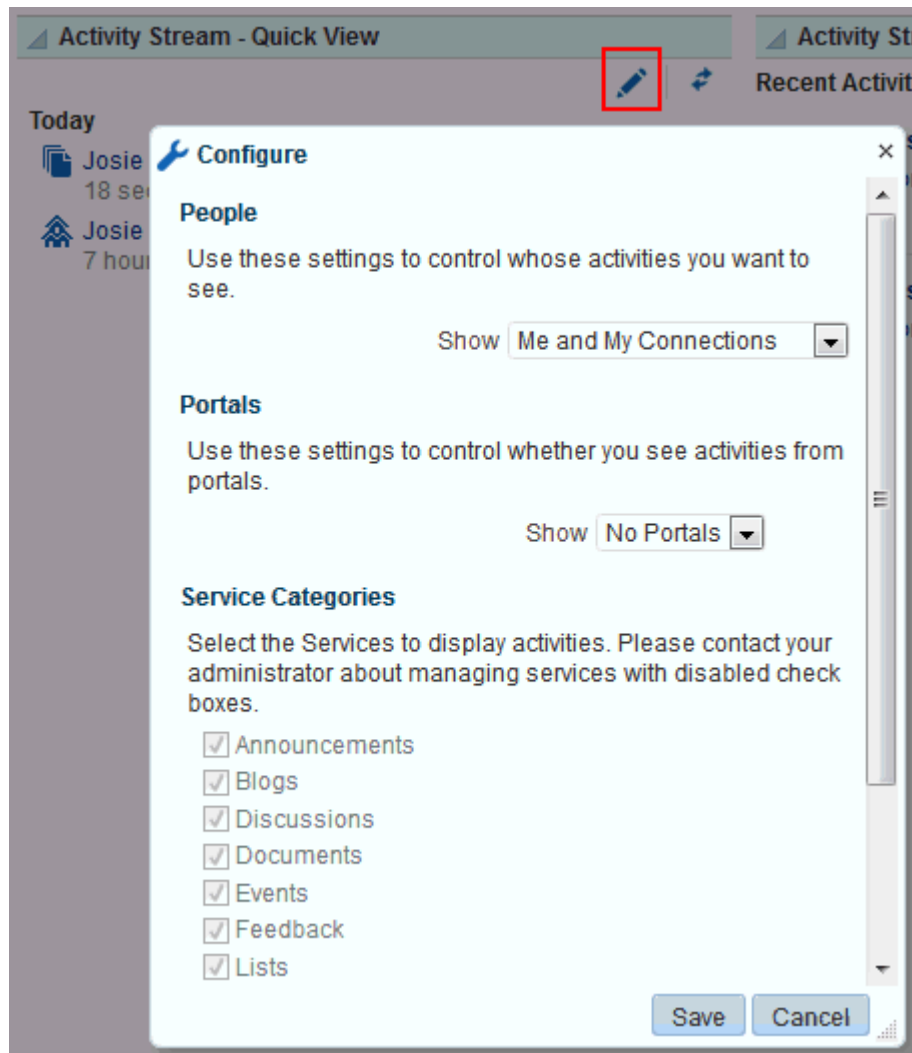
Tip: If you adjust a setting through Preferences that does not seem to affect the behavior of a viewer as you expected, it might be because settings on the viewer instance override Preferences settings.

The Activity Stream viewer provides an **Options** link for accessing configuration settings for a given instance (Figure 24–3).

Figure 24–3 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 24–4).

Figure 24–4 Pencil Icon and Resulting Configure Dialog



Use these controls to adjust an individual viewer instance with the same kinds of settings that are provided for all of your views of Activity Stream through Activity Stream Preferences (for more information, see [Section 24.3, "Setting Activity Stream Preferences"](#) and [Section 24.4, "Working with the Activity Stream"](#)).

Clicking an object in Activity Stream opens the object. For example, clicking the name of a newly created document in Activity Stream opens the document (see [Section 19.6.2, "Opening a File"](#) for more information about file preview in the Document Viewer). 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 an object to a message streamed from Publisher to the Activity Stream. For more information, see [Chapter 15, "Liking, Commenting On, and Sharing Items in WebCenter Portal."](#)

24.3 Setting Activity Stream Preferences

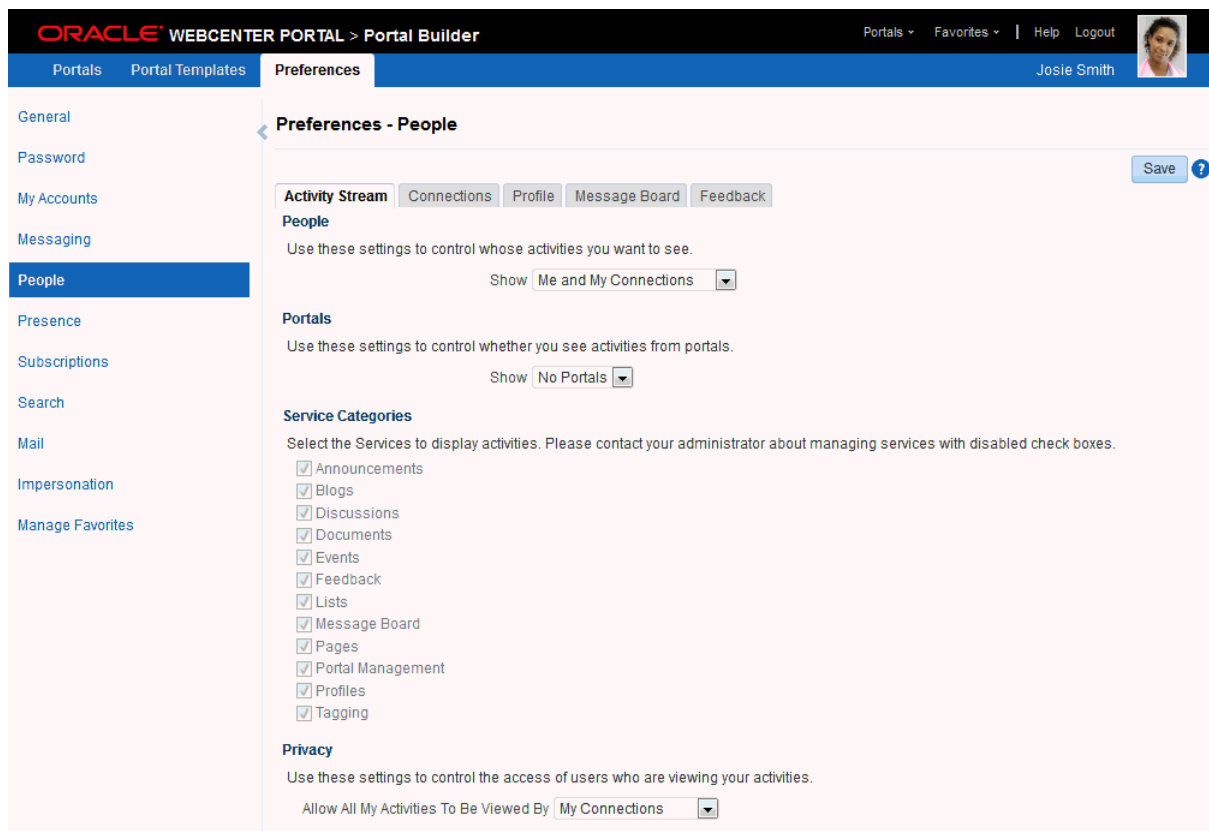
Use Activity Stream Preferences to specify who can view your Activity Stream; the users, categories, and portals for which to track activities; and the activities to show in an Activity Stream view.

See Also: For information about the types of activities that Activity Stream tracks, see [Table 24-1, "Activities Tracked by Activity Stream"](#).

To set Activity Stream preferences:

1. Click **Preferences**.
2. Click **People** to display People Connections preferences.
3. If necessary, click the **Activity Stream** tab to bring it forward ([Figure 24-5](#)).

Figure 24-5 Activity Stream Preferences



4. Under **People**, specify whose activities to show in your view of the Activity Stream:

Tip: This setting relates only to the activities that stream from People Connections. Such activities include making connections, posting Feedback and Messages, adjusting your Profile, and so on.

From the Show list, select one of the following options:

- **Only Me**—Show only your own activities in your view of the Activity Stream.

- **Me and My Connections**—Show only your activities and the activities of your connections in your view of the Activity Stream.
- **No Personal**—Do not show any user activities in your view of the Activity Stream, including your own.
- **Selected Connection Lists**—Show the activities of only those users on the selected connections lists in your view of the Activity Stream.

When you select this option, all available connections lists appear below it. Select one or more connections lists to limit the display of activities to the users on those lists.

Note: Use this option only after you have created one or more connections lists (for more information, see [Section 11.7, "Creating and Managing Groups of Contacts"](#)).

5. Under **Portals**, select to show activities from:

- **All Portals**—Stream activities from all available portals.

Note: When **All Portals** and **Selected Connection Lists** (from step 4) are selected, the activity stream shows the selected users personal activities and the activities in the portals of which the selected users are members. For example, the activity stream displays an entry when the user creates a portal (personal activity) and displays an entry when an announcement or document is created in a portal of which the user is a member (portal activity).

- **My Portals**—Stream activities from the portals of which you are a member.
- **No Portals**—Do not stream any activities from portals other the Home portal.

6. Under **Service Categories**, select the category for which to track activities.

Select a check box to track the activity of a particular category; deselect a check box to ignore the activity of a particular category.

Tip: Selecting **No Portals** in the previous step affects the outcome of your category selection: despite their selection here, categories publish no activities to your view of the Activity Stream.

7. Under **Privacy**, identify the types of users who can see your view of the Activity Stream:

- **Everyone**—All users, whether they are logged in, can see your view of the Activity Stream.
- **Authenticated Users**—All users who are logged in can see your view of the Activity Stream.
- **My Connections**—The people to whom you are connected can see your view of the Activity Stream.
- **Myself**—Only you can see your view of the Activity Stream.

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

24.4 Working with the Activity Stream

You can perform user customizations on an Activity Stream viewer that affect only your view of the viewer. Activity Stream viewers provide user customization controls for determining whose activities and what activities are streamed.

Your system administrator can perform application customizations on an Activity Stream viewer that affect everyone's view of the viewer. For example, Activity Stream your system administrator can enable or disable the display of links for liking, sharing, and commenting on individual Activity Stream items. Therefore, some of the actions described in this section might not be available, depending on such customizations.

This section provides information about controlling whose activities and what activities are shown in a given viewer instance, as well as how to like and comment on a streamed item, and how to share a file or URL with other users through the Activity Stream.

This section includes the following subsections:

- [Section 24.4.1, "Selecting the People to Stream in an Activity Stream Instance"](#)
- [Section 24.4.2, "Selecting the Portals to Stream in an Activity Stream Viewer"](#)
- [Section 24.4.3, "Selecting the Categories to Stream in an Activity Stream Viewer"](#)
- [Section 24.4.4, "Hiding and Showing the Activities of a Selected User"](#)
- [Section 24.4.5, "Hiding and Showing the Activities of a Selected Portal"](#)
- [Section 24.4.6, "Liking and Commenting On Activity Stream Items"](#)
- [Section 24.4.7, "Sharing Files and other Objects Through an Activity Stream Item"](#)

24.4.1 Selecting the People to Stream in an Activity Stream Instance

Use the **Options** link in an Activity Stream viewer to specify the people from whom to stream activities in your view of the Activity Stream. Use the pencil icon in an Activity Stream - Quick View to perform the same operation.

To select the people from whom to stream activities in your view of an Activity Stream viewer:

1. Go to an Activity Stream viewer or Activity Stream - Quick View.
2. In an Activity Stream viewer, click **Options**.

In an Activity Stream - Quick View, click the **Change the source, filter, and display options** icon (pencil).

3. For Activity Stream only: in the resulting dialog, click the **Settings** tab to bring it forward.
4. Under **People**, select the people from whom to stream activities:
 - **Only Me**—Show only your own activities in your view of the Activity Stream.
 - **Me and My Connections**—Show only your activities and the activities of your connections in your view of the Activity Stream.
 - **No Personal**—Do not show any user activities in your view of the Activity Stream, including your own.
 - **Selected Connection Lists**—Show the activities of only those users on the selected connections lists in your view of the Activity Stream.

When you select this option, all available connections lists appear below it. Select one or more connections lists to limit the display of activities to the users on those lists.

Note: Use this option only after you have created one or more connections lists (for more information, see [Section 11.7, "Creating and Managing Groups of Contacts"](#)).

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

24.4.2 Selecting the Portals to Stream in an Activity Stream Viewer

Use the **Options** link in an Activity Stream viewer to select the portals from which to stream activities. Use the pencil icon in an Activity Stream - Quick View to perform the same operation.

To select the portals from which to stream activities in an Activity Stream viewer instance:

1. Go to an instance of an Activity Stream viewer or Activity Stream - Quick View.

2. In an Activity Stream viewer, click **Options**.

In an Activity Stream - Quick View, click the **Change the source, filter, and display options** icon (pencil).

3. For Activity Stream only: in the resulting dialog, click the **Settings** tab to bring it forward.
4. Under **Portals**, select to show activities from all available portals in your view of the Activity Stream (**All Portals**), or omit the display of any portal activities (**No Portals**).

Tip: Selecting **No Portals** affects the outcome of your category selection (see [Section 24.4.3, "Selecting the Categories to Stream in an Activity Stream Viewer"](#)): despite their selection, categories publish no activities to your view of the Activity Stream.

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

24.4.3 Selecting the Categories to Stream in an Activity Stream Viewer

Use the **Options** link on an Activity Stream viewer to select the categories from which to stream activities. Use the pencil icon on an Activity Stream - Quick View to perform the same operation.

To select the categories from whom to stream activities in an Activity Stream viewer:

1. Go to an Activity Stream viewer or Activity Stream - Quick View.

2. In an Activity Stream viewer, click **Options**.

In an Activity Stream - Quick View, click the **Change the source, filter, and display options** icon (pencil).

3. For Activity Stream only: in the resulting dialog, click the **Settings** tab to bring it forward.
4. Under **Service Categories**, select the categories for which to track activities.

Select a check box to track the activity of a particular category; deselect a check box to ignore the activity of a particular category.

Tip: Selecting **No Portals** (as described in [Section 24.4.2, "Selecting the Portals to Stream in an Activity Stream Viewer"](#)) affects the outcome of your category selection: despite their selection here, categories publish no activities to your view of the Activity Stream.

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

24.4.4 Hiding and Showing the Activities of a Selected User

Some of your connections might post activities with a frequency that is more of a distraction than a help. In this case, or for any other reason, you can select to hide the activities streamed from selected users in your view of the Activity Stream (or from the **Activities** page in the Home portal).

You can easily reverse this action by showing one or more hidden users through the **Options** link on the affected Activity Stream viewer.

This section describes how to hide or show the activities of individual users in an Activity Stream viewer instance. It includes the following subsections:

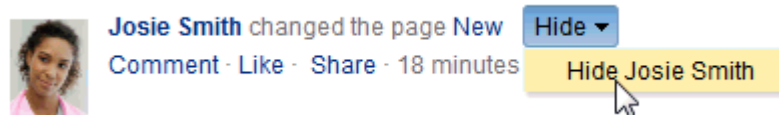
- [Section 24.4.4.1, "Hiding the Activities of a Selected User"](#)
- [Section 24.4.4.2, "Showing the Activities of a Hidden User"](#)

24.4.4.1 Hiding the Activities of a Selected User

To hide the activities streaming from a selected user in an Activity Stream viewer instance:

1. Go to an instance of an Activity Stream viewer.
2. Open the **Hide** menu next to the user you want to hide, and select the relevant user name ([Figure 24-6](#)).

Figure 24-6 The Hide Option in the Activity Stream



3. Click **OK** in the confirmation dialog.

The page refreshes, and the viewer no longer shows activities from the selected user.

See Also: For information about showing a hidden user, see [Section 24.4.4.2, "Showing the Activities of a Hidden User."](#)

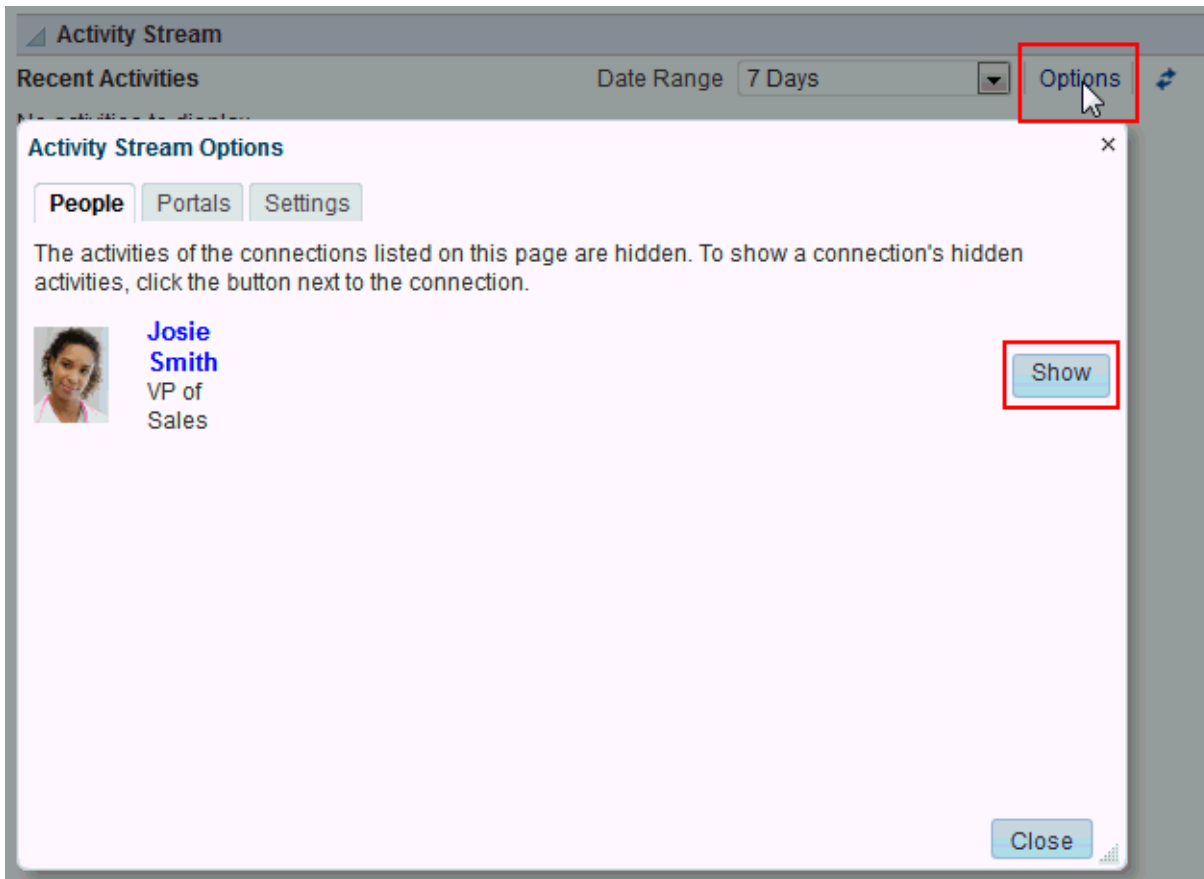
24.4.4.2 Showing the Activities of a Hidden User

To reinstate the streaming of activities from a hidden user:

1. Go to an instance of an Activity Stream viewer where a user's activities are hidden.
2. Click **Options**.
3. In the resulting dialog, click the **People** tab to bring it forward.

- Next to the person whose activities you want to show, click **Show** (Figure 24–7).

Figure 24–7 The Options Link and the Show Button



24.4.5 Hiding and Showing the Activities of a Selected Portal

If there is a portal that streams activities that are not currently of interest to you, you can hide that portal's activities from a selected instance of the Activity Stream viewer (or from the **Activities** page in the Home portal).

You can easily reverse this action by showing one or more hidden portals through the **Options** link on the affected Activity Stream viewer.

To hide the activities streaming from a particular portal, the affected Activity Stream viewer instance must be configured to show **All Portals** or **My Portals** (for more information, see [Section 24.3, "Setting Activity Stream Preferences"](#) and [Section 24.4.2, "Selecting the Portals to Stream in an Activity Stream Viewer"](#)).

Tip: Whether the activities streaming from portal are shown can be determined at the application level, in personal Preferences, and on an individual viewer instance by you or by your system administrator. If you find you cannot hide or show activities streaming from portals, it is likely that at one of these levels, the facility to see such activities has been blocked.

This section describes how to hide the activities streaming from a particular portal and how to show those hidden activities. It includes the following subsections:

- [Section 24.4.5.1, "Hiding the Activities of a Selected Portal"](#)
- [Section 24.4.5.2, "Showing the Activities of a Hidden Portal"](#)

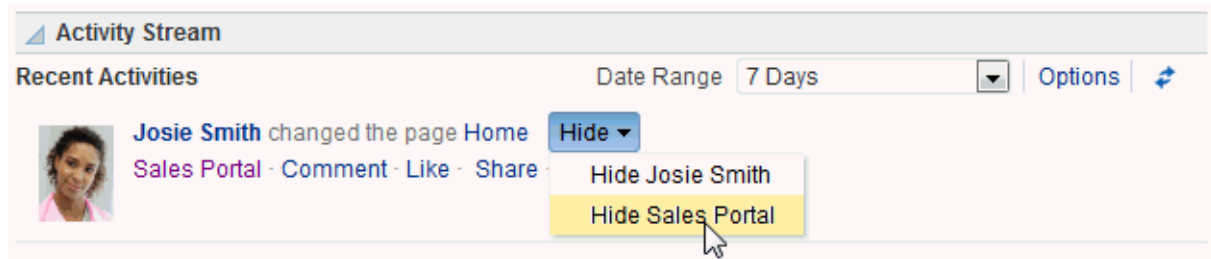
24.4.5.1 Hiding the Activities of a Selected Portal

To hide the activities streaming from a selected portal in an Activity Stream viewer instance:

Note: Your Preference settings may prevent any portal activities from streaming. For information about Activity Stream Preferences, see [Section 24.3, "Setting Activity Stream Preferences."](#)

1. Go to an instance of an Activity Stream viewer.
2. Open the **Hide** menu next to an activity that has streamed from the portal you want to hide, and select the relevant portal name ([Figure 24–8](#)).

Figure 24–8 Selecting to Hide a Portal



3. Click **Yes** in the confirmation dialog.
The page refreshes, and the viewer no longer shows activities from the selected portal.

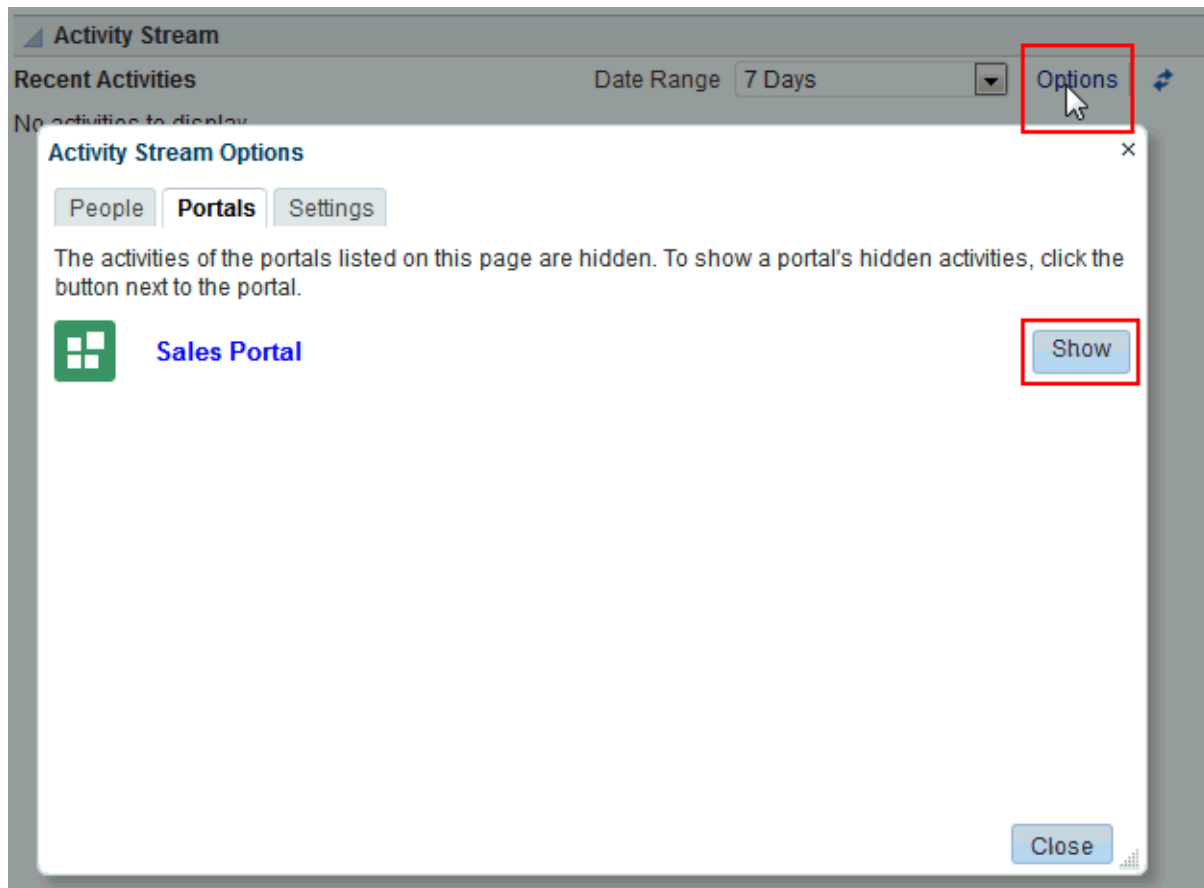
See Also: For information about showing a hidden portal, see [Section 24.4.5.2, "Showing the Activities of a Hidden Portal."](#)

24.4.5.2 Showing the Activities of a Hidden Portal

To reinstate the streaming of activities from a hidden portal:

1. Go to an instance of an Activity Stream viewer where a portal's activities are hidden.
2. Click **Options**.
3. In the resulting dialog, click the **Portals** tab to bring it forward.
4. Next to the portal whose activities you want to show, click **Show** ([Figure 24–9](#)).

Figure 24–9 The Options Link and the Show Button in Activity Stream Options Dialog



24.4.6 Liking and Commenting On Activity Stream Items

Provided the Activity Stream viewer has been configured to do so, you and the users to whom you have provided access to your Activity Stream can express a liking for or comment on a particular streamed item.

To express a liking for a streamed item, go to an Activity Stream viewer and click the **Like** link. You can remove your liking by clicking the resulting **Unlike** link.

To comment on a streamed item, click the **Comment** link, enter a comment in the input area, then click **Comment** to display your comment below the item. The comment display is limited to 500 characters. For each comment you add, a delete icon is provided to enable you to remove your comment.

See Also: For more information, see [Chapter 15, "Liking, Commenting On, and Sharing Items in WebCenter Portal."](#)

24.4.7 Sharing Files and other Objects Through an Activity Stream Item

Provided the Activity Stream viewer is configured to support it, you can share a streamed item with all of the users who are allowed to view your streamed activities. This could be all of your connections or all of the users on a selected connections list. Who an item is shared with is determined by how you or your system administrator has configured Activity Stream.

If you prefer, you can send a streamed item through mail, and consequently select all recipients yourself.

To share a streamed item:

1. Go to the streamed item of interest.
2. Select an option from the **Share** menu (Figure 24–10).

Figure 24–10 Share Menu on a Streamed Activity



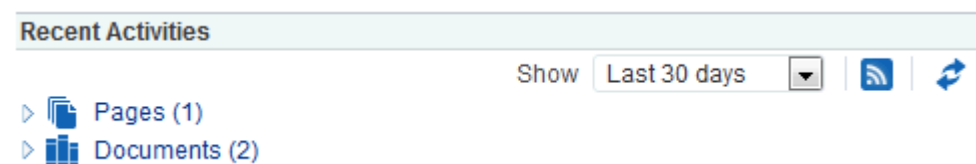
- Select **This activity** to stream a URL to the item (such as a new portal, a new announcement or discussion topic, and the like) to all enabled users.
- Select **Send Mail** to send an email with a link to the item to all specified recipients.

See Also: For more information, see [Chapter 15, "Liking, Commenting On, and Sharing Items in WebCenter Portal."](#)

24.5 About Recent Activities

Recent Activities track changes in WebCenter Portal providing a quick and easy way to view any additions or changes to a particular area of WebCenter Portal. Tracked changes include additions and revisions to pages, documents, discussion forums, lists (Portals only), and events. (Figure 24–11).

Figure 24–11 The Recent Activities Viewer



Recent activities can track the following information:

- Documents added
- Announcements created
- Discussion forums created
- Pages created or modified
- List definitions created or modified

By default, the Recent Activity list displays 25 recent activities for a given feature. If more than 25 activities have occurred, the Recent Activity list displays the 25 most recent. Your system administrator can change the default value, so your limit might be more or less than 25.

The level of information provided in the Recent Activity list depends on the context in which the list is placed. In a portal page, the Recent Activity list summarizes changes

occurring in that portal. In your Home portal, your system administrator must set the Recent Activities viewer properties to specify a portal. 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.

Note: You can track recent activities through your favorite RSS reader. For more information, see [Chapter 27, "Monitoring RSS Feeds."](#)

24.6 Working with Recent Activities

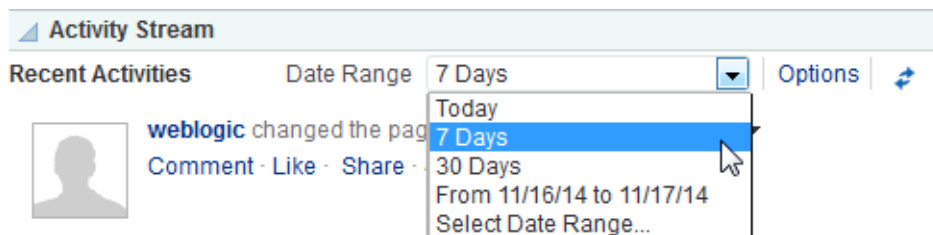
You can personalize your view of recent activities, access a changed item, and refresh your view to update the viewer with the latest changes. This section tells you how. It contains the following subsections:

- [Section 24.6.1, "Personalizing the Recent Activities Viewer"](#)
- [Section 24.6.2, "Accessing Recently Acted-On Items"](#)
- [Section 24.6.3, "Refreshing the Recent Activities Viewer"](#)

24.6.1 Personalizing the Recent Activities Viewer

The Recent Activities viewer provides a way to specify the range of days for showing changes and additions to WebCenter Portal. These date-range options appear on the **Date Range** menu in the Recent Activities viewer toolbar ([Figure 24–12](#)).

Figure 24–12 Date-Range Options on the Recent Activity Toolbar



Select an option from the **Date Range** menu to view recent activities occurring within the selected range. The range you select is applicable only to that viewer instance. If you have more than one Recent Activities viewer instance on the page, you can show activities from a different time range in each.

Tip: Ensure that your Preferences reflect your own local time zone. To access your time zone preference in the Portal application, click the **Preferences** link at the top of WebCenter Portal, and then select **General**. For more information, see [Section 5.3, "Setting Date and Time Preferences."](#)

The default options on the **Date Range** menu include:

- **Today**—Shows all activities that have taken place between 12:00AM (2400 hours) and now.
- **7 days**—Shows all activities that have taken place in the last 7 days.

- **30 days**—Shows all activities that have taken place in the last 30 days.
- **From date to date**—Shows all activities that have taken place within a range you specify.
- **Select Date Range**—Click to select a date range to use with the date-to-date option.

Note: These options are described according to their default meanings. In some instances, an advanced user can provide alternative definitions for them.

24.6.2 Accessing Recently Acted-On Items

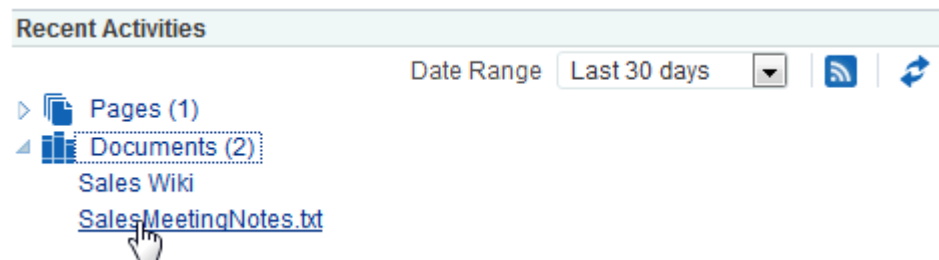
The Recent Activities viewer groups the different activities it reports on into nodes that are named for each feature (for example, Pages and Documents; shown in [Figure 24-13](#)).

Figure 24-13 Feature Nodes in the Recent Activities Viewer



Expand a node, and access the changed item directly by clicking its link ([Figure 24-14](#)).

Figure 24-14 Recent Discussion Link in the Recent Activities Viewer

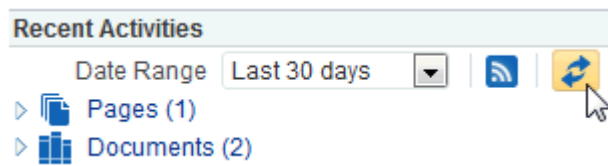


The targets of linked items open on dynamically-generated pages, or in Portal application, on dynamically-generated, top-level tabs. Link targets appear according to their parent feature. For example, click a Discussions link to access a forum or a specific topic under a forum; click a Lists link to access an updated list of lists or a specific updated list; click an event to display event details; and so on.

24.6.3 Refreshing the Recent Activities Viewer

If you prefer not to wait for an automatic refresh of the Recent Activities viewer, you have the option of refreshing the data yourself by clicking the Refresh icon ([Figure 24-15](#)).

Figure 24–15 *The Refresh Icon on a Recent Activities Viewer*



The viewer updates and indicates the number of recently-changed items by increasing the value displayed in parenthesis next to each affected feature.

Working with Announcements

This chapter describes how to use the features provided with announcements. Announcements offer a quick, convenient way to create and broadcast messages instantly or at a specified future date. Portal moderators provide access to the Announcements view or page (console) for portal participants.

This chapter includes the following topics:

- [Section 25.1, "About Announcements"](#)
- [Section 25.2, "Working with Announcements"](#)

Permissions: This chapter is intended for WebCenter Portal users who want to view, create, and manage portal announcements. To perform the tasks in this chapter, you need *one* or more of the following portal-level permissions:

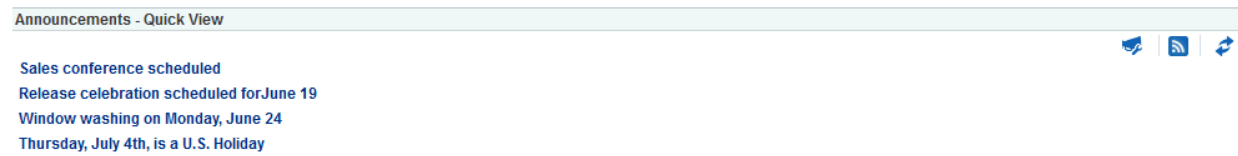
- Create, Edit, and Delete Announcements
- Create and Edit Announcements
- View Announcements

These permissions are not granted by default to the portal Participant role.

Note: Tasks discussed in this chapter are not available if announcements are not enabled and exposed. The portal moderator adds and configures announcements, as described in the "Adding Announcements to a Portal" chapter in *Building Portals with Oracle WebCenter Portal*.

25.1 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 25-1](#)).

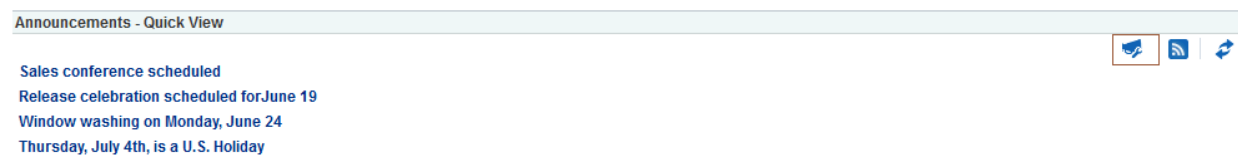
Figure 25–1 Sample Announcement in the Announcements - Quick View

Announcements are integrated with many other features, such as the Activity Stream, RSS, and instant messaging and presence, and you can link announcements to other assets. For example, if your company is announcing a new product, you can link from the announcement directly to a discussion forum, where potential customers can ask other customers about the product.

Announcements are limited to the portal where you create them. In the Home Portal, announcements are for WebCenter Portal (or application-wide), and are available to all logged-in (authenticated) users.

25.2 Working with Announcements

The **Announcements** page (or console), or the Announcements - Quick View and Announcements viewer on a page can display announcements. You can also manage announcements using the Announcement Manager. Click the **Open Announcement Manager** icon (Figure 25–2) to manage announcements.

Figure 25–2 Open Announcement Manager Icon in the Announcements - Quick View

The Announcements - Quick View includes numerous parameters to customize your view. For example, portal moderators can remove the link to the Announcement Manager. This lets you view announcements where manage controls are not needed. Users can view 10 announcements by default, but you can change this number and change how much of the announcement is displayed. The **More Announcements** link opens a separate window, containing the complete list of all announcements with pagination behavior. This is called the Extended Quick View (or Extended Mini View).

Depending on the privileges you have on the page, you can perform some or all tasks described in this section:

- View announcements—All participants in the Home portal and portal moderators. For more information, see [Section 25.2.1.1, "Viewing Announcements."](#)
- Create announcements—All participants. For more information, see [Section 25.2.1.3, "Creating an Announcement."](#)
- Edit announcements—Creator of the announcement, discussions server system administrators in the Home portal, and portal moderators. For more information, see [Section 25.2.1.4, "Editing Announcements."](#)

Note: If participants have `Create`, `Edit`, and `Delete Announcements` permissions, they can edit any announcement in the portals in which they have access. If they have `Create` and `Edit Announcements` permissions, they can edit only those announcements that they created.

- Delete announcements—Discussions server system administrators in the Home portal and portal moderators. For more information, see [Section 25.2.1.5, "Deleting an Announcement."](#)

Note: If participants have `Create`, `Edit`, and `Delete Announcements` permissions, they can delete any announcement in the portals in which they have access. If they have `Create` and `Edit Announcements` permissions, they can delete only those announcements that they created.

This section contains the following topics:

- [Section 25.2.1, "Working with Announcements"](#)
- [Section 25.2.2, "Working with the Announcements - Quick View"](#)
- [Section 25.2.3, "Sending Mail from an Announcement"](#)
- [Section 25.2.4, "Linking Announcements"](#)
- [Section 25.2.5, "Subscribing to Announcements Using RSS"](#)

25.2.1 Working with Announcements

Announcements not only provides the tools to create, edit, and delete announcements, it also provides controls for determining when an announcement is published and when it expires. When an announcement expires, the announcement is removed from the list. You can use the **Show** lists to personalize your view of announcements. After you create an announcement, you are offered the option to mail or link the announcement to other assets.

Depending on the privileges you have on the page and whether announcements are configured in WebCenter Portal or the individual portal, you may see only a subset of these options in the Announcement Manager. For example, the **Delete** icon is displayed only to users with `Create`, `Edit`, and `Delete Announcements` permissions to delete *all* announcements, or displayed only to users with `Create` and `Edit Announcements` permissions to delete only the announcements that the user creates.

This section provides information about viewing, creating, and managing announcements.

This section contains the following topics:

- [Section 25.2.1.1, "Viewing Announcements"](#)
- [Section 25.2.1.2, "Adjusting Your View of the Announcements"](#)
- [Section 25.2.1.3, "Creating an Announcement"](#)
- [Section 25.2.1.4, "Editing Announcements"](#)
- [Section 25.2.1.5, "Deleting an Announcement"](#)

25.2.1.1 Viewing Announcements

To view announcements, either go to the Announcements view on a page, or navigate to the **Announcement** console on the **Announcements** page.

Note: The way you access announcements depends on how the portal is designed. The portal moderator might also provide you with a pretty URL to access the page.

Figure 25–3 shows the announcements console on the **Announcements** page.

Figure 25–3 *Announcement Console on an Announcements Page*

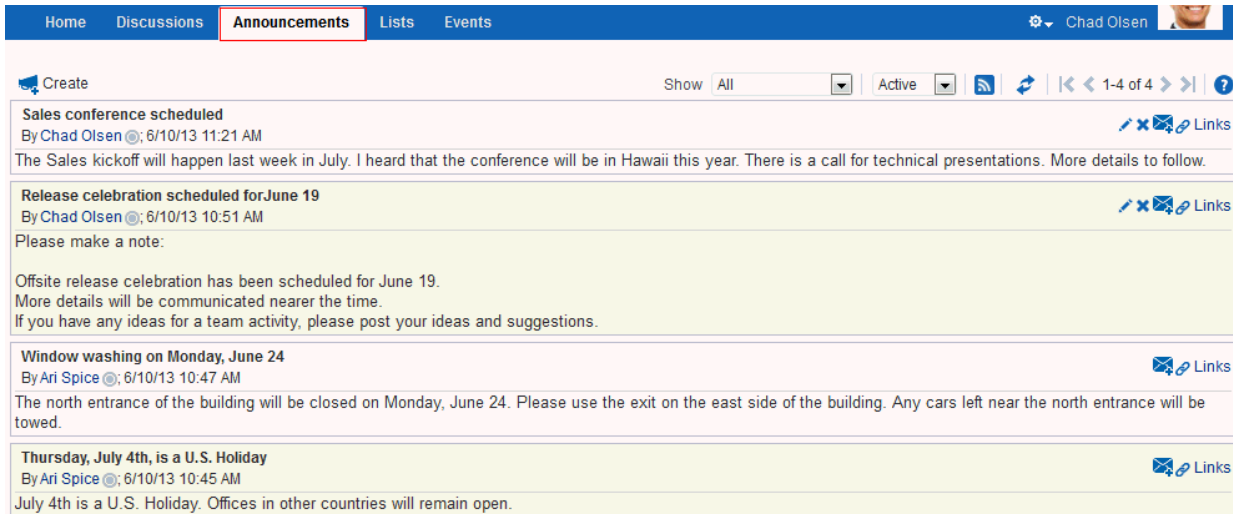
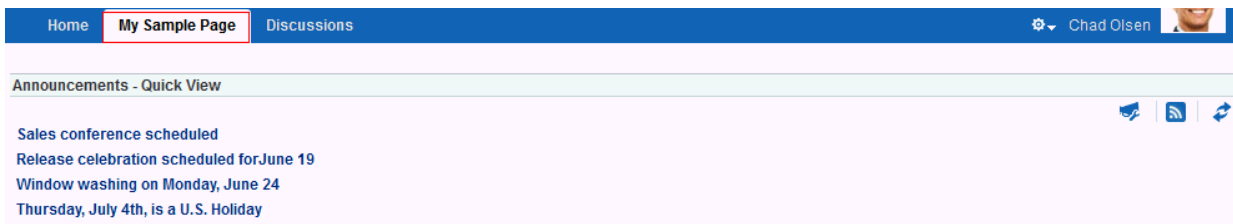


Figure 25–4 shows announcements in the Announcements - Quick View viewer on a page.

Figure 25–4 *Announcements in the Announcements - Quick View on a Page*



See Also: [Section 25.2.2.1, "Viewing Announcements in the Quick View"](#)

25.2.1.2 Adjusting Your View of the Announcements

You can customize your own view of announcements, which does not affect the view of other users. All users who can view announcements can customize it.

A **Show** list provides options for displaying only those announcements that were created within a selected time range. Choose from displaying all announcements to displaying only those created today, since yesterday, and so on—up to 30 days. For

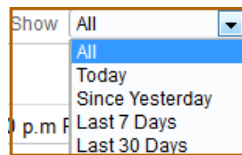
example, you may select the option **Today** from the **Show** menu, and only those announcements posted today display.

Another **Show** list provides options to display current, future, or expired announcements.

To adjust your view of announcements:

1. Go to the portal page that contains the Announcements view.
2. Click the **Show** drop-down list and select from the listed display options (Figure 25-5).

Figure 25-5 Show Menu for Announcements



Select from one of the following options:

- **All**—Displays all available announcements
- **Today**—Displays only today's announcements
- **Since Yesterday**—Displays today's and yesterday's announcements
- **Last 7 Days**—Displays all announcements from the last seven days
- **Last 30 Days**—Displays all announcements from the last 30 days

The Announcements view refreshes and displays the announcements that match your selection. If the view does not refresh, click the Refresh icon.

3. Select from the other drop-down list to show active, future, or expired announcements (Figure 25-6).

Figure 25-6 Active, Future or Expired Announcements

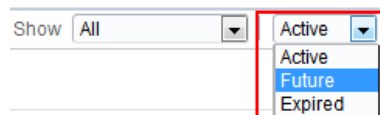


Table 25-1 shows the different combinations of announcement you can view from the **Show** list for viewing announcements.

Table 25-1 Announcements Displayed Based on Show List

Days Range	Announcement Type	Display Result
All	Active	All announcements as of today
Today	Active	All announcements with a start date of today
Since Yesterday	Active	All announcements with a start date as of yesterday
Last 7 Days	Active	All announcements for the last seven days
Last 30 Days	Active	All announcements for the last 30 days
All	Future	All announcements scheduled for a later date
Today	Future	All announcements scheduled for a later date

Table 25–1 (Cont.) Announcements Displayed Based on Show List

Days Range	Announcement Type	Display Result
Since Yesterday	Future	All announcements scheduled for a later date
Last 7 Days	Future	All announcements scheduled for a later date
Last 30 Days	Future	All announcements scheduled for a later date
All	Expired	All expired announcements
Today	Expired	No announcements
Since Yesterday	Expired	All expired announcements as of yesterday
Last 7 Days	Expired	All expired announcements for the last seven days
Last 30 Days	Expired	All expired announcements for the last 30 days

25.2.1.3 Creating an Announcement

Create an announcement to distribute information to all members of WebCenter Portal or to members of a single portal in one operation. For example, if you are the system administrator and want to shut down WebCenter Portal for maintenance, you can create an announcement to inform all WebCenter Portal users about the down time, or if you want to post an announcement for an individual portal for its members to view, you can create an announcement just for that portal. On the publication date you specify, while creating the announcement, the announcement appears in the Announcements view and Announcements - Quick View, and on the Activity Stream.

All portal members who are participants and who have `Create`, `Edit`, and `Delete Announcements` or `Create and Edit Announcements` permissions can create announcements.

To create a new announcement:

1. Access the Announcements view, access the **Announcements** console, or open the Announcement Manager from the Announcements - Quick View.
See [Section 25.2.1.1, "Viewing Announcements"](#) for more information.
2. Click **Create** ([Figure 25–7](#)).

Figure 25–7 Create an Announcement

The screenshot shows the 'Create' button highlighted in red. Below it, a list of announcements is displayed. Each announcement includes a title, author, date, and content. The first announcement is 'Sales conference scheduled' by Chad Olsen on 6/10/13 11:21 AM. The second is 'Release celebration scheduled for June 19' by Chad Olsen on 6/10/13 10:51 AM. The third is 'Window washing on Monday, June 24' by Ari Spice on 6/10/13 10:47 AM. The fourth is 'Thursday, July 4th, is a U.S. Holiday' by Ari Spice on 6/10/13 10:45 AM. Each announcement has a 'Links' icon to its right.

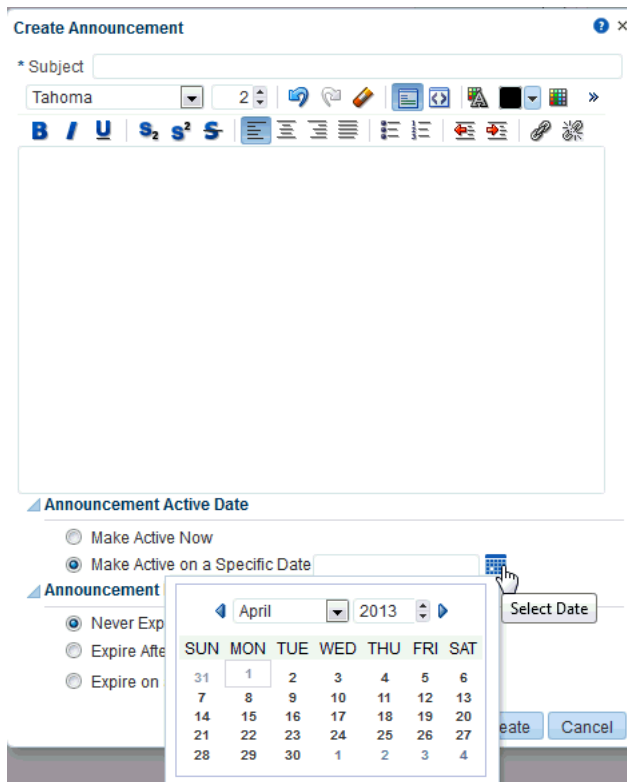
The Create Announcement dialog opens ([Figure 25–7](#)).

Figure 25–8 Create Announcement Dialog

3. In the **Subject** field, enter a title for the announcement.
4. In the message body text box, enter the text of the announcement.
Use the rich text editor to style the announcement with colors, special fonts, images, and so on. For information about rich text editor controls, see the online help.
5. For **Announcement Active Date**, select from one of the following options:
 - **Make Active Now** — To post the announcement immediately (the default option)
 - **Make Active on Specific Date** — To select a date to post the announcement
Click the **Select Date** icon to the right of the text field to open the **Select Date** picker (Figure 25–9), select a date or navigate to the appropriate month and date to select it.

If a later date is selected and mail is configured for notifications, then the notification mail is delivered at a later date, provided the servers are not restarted.

Figure 25–9 Select Date Picker Calendar



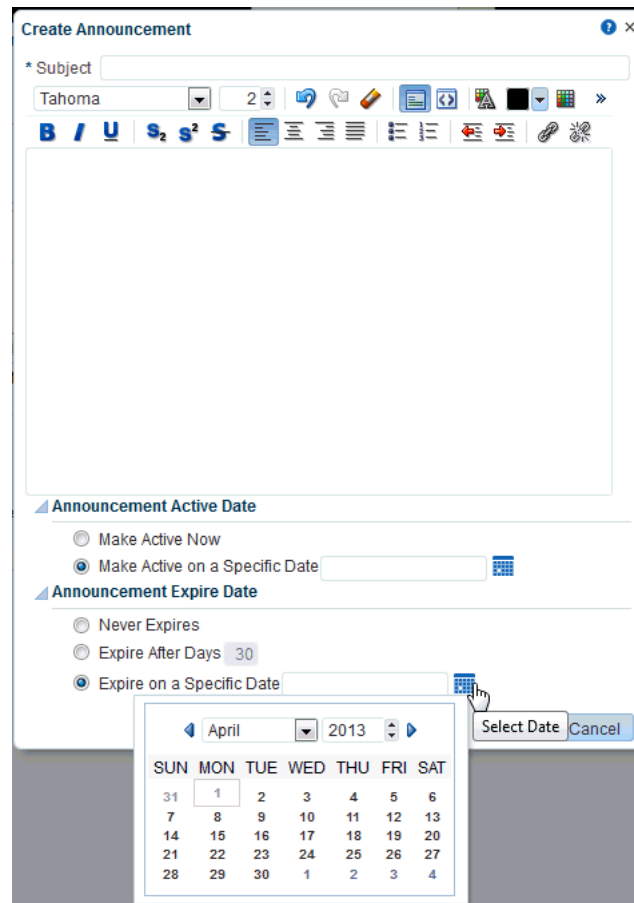
After you select a date, the calendar closes.

6. Under **Announcement Expire Date**, select from one of the following options:
 - **Never Expires** — To post the announcement indefinitely (the default option)
 - **Expire After Days** — To specify the number of days the announcement is active

Enter the number of days to display the announcement.

- **Expire on a Specific Date** — To set the date to expire and remove the announcement from the list

Click the **Select Date** icon next to the text field to open the **Select Date** picker (Figure 25–10).

Figure 25–10 Select Expiration Date Calendar

In the calendar, only those dates after the active date are enabled for selection.

7. Click **Create** to create the announcement.

If you selected to post the announcement immediately, then the new announcement appears in the following locations: in any Announcements view included on a page, on the Activity Stream, and at the top of the list of announcements in the Announcements - Quick View.

25.2.1.4 Editing Announcements

After you have created an announcement, you easily can modify it. For example, if the details of an announcement change, or you want to change the font or color of the announcement text, you can quickly make these changes. You can change an announcement's title, content and expiration date. However, you cannot change its publication date, which is the date on which the announcement is made active (Announcement Active Date).

Note: To change an announcement's publication date, you must delete the announcement, and re-create it with the correct publication date. See [Section 25.2.1.5, "Deleting an Announcement"](#) for information about deleting an announcement. See [Section 25.2.1.3, "Creating an Announcement"](#) for information about creating an announcement.

You can edit an announcement only if you created that announcement or have been granted privileges to do so. If you have *Create*, *Edit*, and *Delete Announcements* permissions, you can edit any announcement in the portals in which you have access. If you have *Create* and *Edit Announcements* permissions, you can edit only those announcements that you created. Typically, portal moderators have privileges to edit all announcements in the *Announcements* view.

To edit an announcement:

1. Access the *Announcements* view, access the **Announcements** console, or open the *Announcement Manager* from the *Announcements - Quick View*.

See [Section 25.2.1.1, "Viewing Announcements"](#) for more information.

2. Click the **Edit Announcement** icon ([Figure 25–11](#)) for the announcement you want to edit.

Notice that the *Edit Announcement* icon appears in the announcements that were created by the logged in user; the icon does not appear with those announcements that were created by other users (unless the user has *Create*, *Edit*, and *Delete Announcements* permissions).

Figure 25–11 *Edit Announcement Icons*

The screenshot shows the Oracle Fusion Middleware Announcements console. The top navigation bar includes Home, Discussions, Announcements (selected), Lists, and Events. The user is logged in as Chad Olsen. The main content area displays a list of announcements. Each announcement has an edit icon (pencil) highlighted with a red box, indicating that the user can edit announcements they created. The announcements are:

- Sales conference scheduled** (Created by Chad Olsen on 6/10/13 11:21 AM). Content: "The Sales kickoff will happen last week in July. I heard that the conference will be in Hawaii this year. There is a call for technical presentations. More details to follow."
- Release celebration scheduled for June 19** (Created by Chad Olsen on 6/10/13 10:51 AM). Content: "Please make a note: Offsite release celebration has been scheduled for June 19. More details will be communicated nearer the time. If you have any ideas for a team activity, please post your ideas and suggestions."
- Window washing on Monday, June 24** (Created by Ari Spice on 6/10/13 10:47 AM). Content: "The north entrance of the building will be closed on Monday, June 24. Please use the exit on the east side of the building. Any cars left near the north entrance will be towed."
- Thursday, July 4th, is a U.S. Holiday** (Created by Ari Spice on 6/10/13 10:45 AM). Content: "July 4th is a U.S. Holiday. Offices in other countries will remain open."

The *Edit Announcement* dialog opens.

3. Make the changes you want to the announcement. For example, you can change the text of the announcement, or modify its look and feel.

The *Edit Announcement* dialog provides rich text editor controls for styling announcement text. For information on rich text editor controls, see the online help.

You can change an announcement's title and content, and also its expiration date. However, you cannot change its publication date.

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

25.2.1.5 Deleting an Announcement

You can delete an announcement only if you created that announcement or have been granted privileges to do so. If you have *Create*, *Edit*, and *Delete Announcements* permissions, you can delete any announcement in the portals in which you have

access. If you have `Create` and `Edit Announcements` permissions, you can delete only those announcements that you created. Typically, portal moderators have privileges to delete all announcements in the Announcements view.

To delete an announcement:

1. Access the Announcements view, access the **Announcements** console, or open the Announcement Manager from the Announcements - Quick View.

See [Section 25.2.1.1, "Viewing Announcements"](#) for more information.

2. Click the **Delete Announcement** icon for the announcement you want to delete ([Figure 25–12](#)).

Notice that the Delete Announcement icon appears next to the announcements created by the logged in user; the icon does not appear with those announcements that were created by other users (unless the user has `Create`, `Edit`, and `Delete Announcements` permissions).

Figure 25–12 Delete Announcement Icon on an Announcement View

A Delete Announcement confirmation dialog displays.

3. In the Delete Announcement confirmation dialog, click **Delete** to delete the announcement and close the dialog.

The selected announcement is removed from announcements and the Activity Stream.

25.2.2 Working with the Announcements - Quick View

The Announcements - Quick View is essentially a viewer for convenient access to current announcements. More robust features, for such actions as creating and editing announcements, are offered in the Announcements view (see [Section 25.2.1.1, "Viewing Announcements"](#)).

By default, announcements in the Announcements - Quick View show announcement titles as links. But portal moderators can configure it to display only announcement titles, titles with some amount of content, or only content.

Note: The Announcements - Quick View might not be available in the portal if the view has not been added to a page by your portal moderator.

This section contains the following subsections:

- [Section 25.2.2.1, "Viewing Announcements in the Quick View"](#)
- [Section 25.2.2.2, "Managing Announcements in the Quick View"](#)

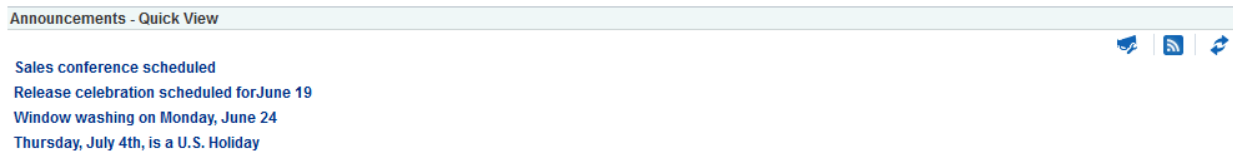
25.2.2.1 Viewing Announcements in the Quick View

The Announcements - Quick View provides a read-only view of announcements.

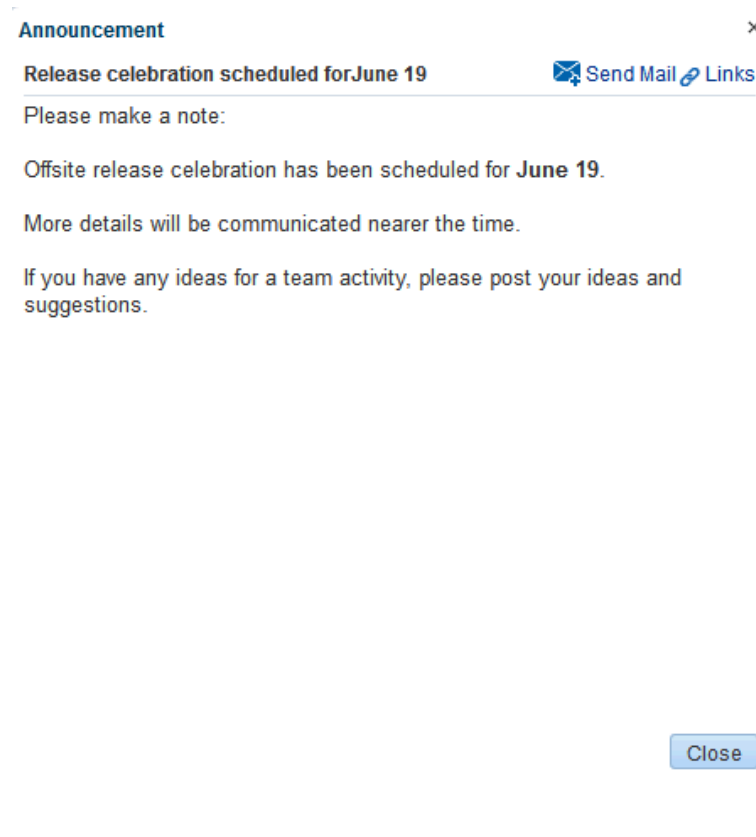
To view announcements in an Announcements - Quick View:

1. In the **Announcements - Quick View**, click the announcement you want to view ([Figure 25-13](#)).

Figure 25-13 *Announcements - Quick View*



The announcement details display in the Announcement dialog ([Figure 25-14](#)). Similar to the announcement content displayed in the Announcements view, this dialog displays content with all the formatting that was applied to it.

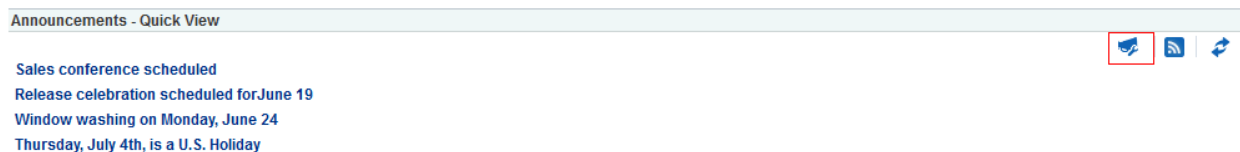
Figure 25–14 Announcement Accessed from Quick View

2. Click **Close** to exit the dialog.

25.2.2.2 Managing Announcements in the Quick View

You can manage announcements in the Announcements - Quick View with the Announcement Manager. The Announcement Manager provides the functionality that is available in the Announcements view.

System administrators can remove the link to the Announcement Manager. If your system administrator allows this functionality, then you can see the **Open Announcement Manager** icon (Figure 25–15). The Announcement Manager lets you create, edit, delete, (only if you have the permissions to create and edit, or create, edit, and delete) mail, and link announcements. For more information, see [Section 25.2.1, "Working with Announcements."](#)

Figure 25–15 Open Announcement Manager Icon

25.2.3 Sending Mail from an Announcement

Each announcement has an associated **Send Mail** icon, which appears when you open an announcement in the Announcements - Quick View, or when you view an announcement from the announcements view.

Figure 25–16 shows the **Send Mail** icon available when you open an announcement from Announcements - Quick View.

Figure 25–16 *Send Mail Icon in an Announcement Opened from Announcements - Quick View*

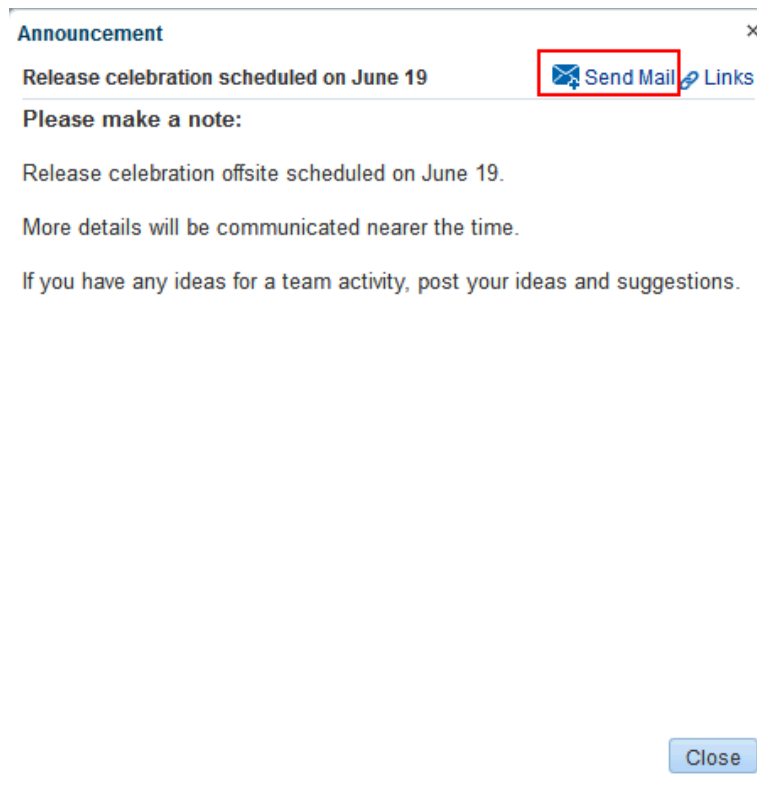


Figure 25–17 shows the **Send Mail** icons that are available in an announcement view.

Figure 25–17 Send Mail Icons in an Announcement View

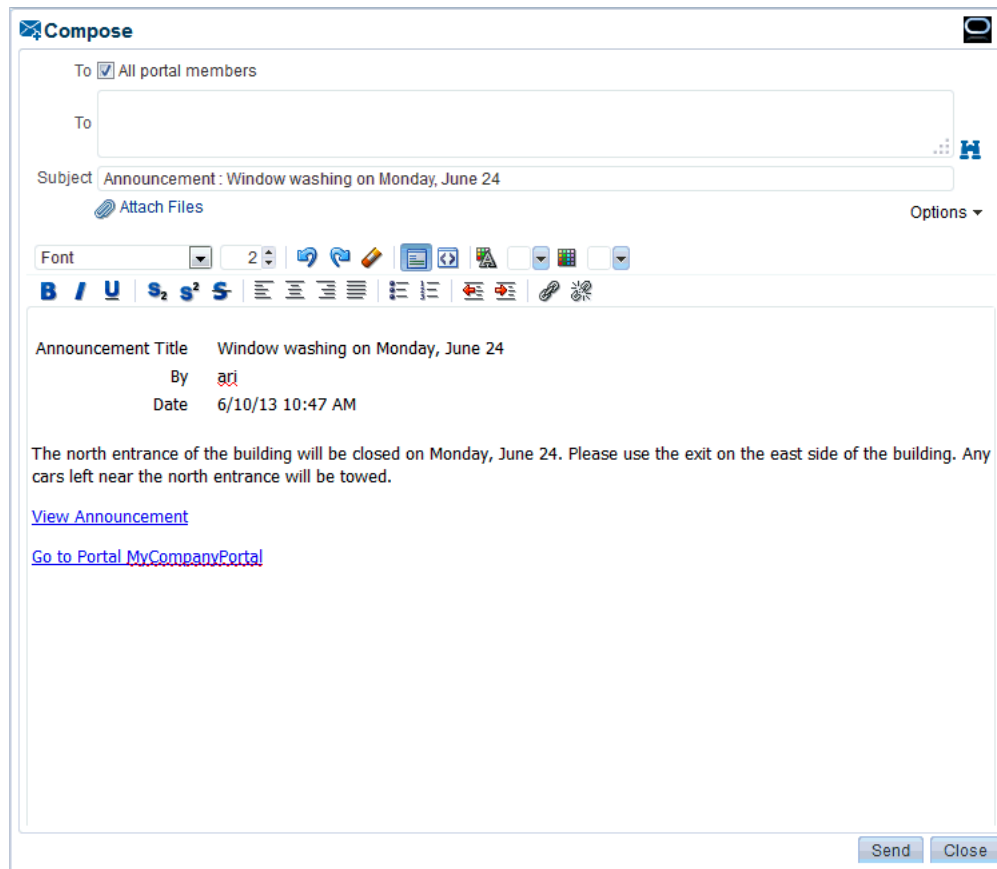
The screenshot displays a web application interface for managing announcements. At the top, there is a navigation bar with tabs for Home, Discussions, Announcements (selected), Lists, and Events. A user profile for Chad Olsen is visible in the top right. Below the navigation bar, there is a 'Create' button and a search/filter area with 'Show All' and 'Active' options. The main content area lists four announcements, each with a 'Send Mail' icon (an envelope) highlighted in a red box. The announcements are:

- Sales conference scheduled**: By Chad Olsen, 6/10/13 11:21 AM. The Sales kickoff will happen last week in July. I heard that the conference will be in Hawaii this year. There is a call for technical presentations. More details to follow.
- Release celebration scheduled for June 19**: By Chad Olsen, 6/10/13 10:51 AM. Please make a note: Offsite release celebration has been scheduled for June 19. More details will be communicated nearer the time. If you have any ideas for a team activity, please post your ideas and suggestions.
- Window washing on Monday, June 24**: By Ari Spice, 6/10/13 10:47 AM. The north entrance of the building will be closed on Monday, June 24. Please use the exit on the east side of the building. Any cars left near the north entrance will be towed.
- Thursday, July 4th, is a U.S. Holiday**: By Ari Spice, 6/10/13 10:45 AM. July 4th is a U.S. Holiday. Offices in other countries will remain open.

Click the **Send Mail** icon to initiate a mail message containing the announcement text, location, author, and date it was created. This feature makes it easy for you to communicate interesting announcements to others.

The system administrator determines the mail client to use with the **Send Mail** icon. If a local mail client was set up, then a plain text message opens. If WebCenter Portal's Mail feature was set as the mail client, then the HTML Mail Compose dialog opens. With either mail client, you can add or edit the standard, prepopulated message before sending.

Figure 25–18 shows the **Send Mail** window that opens when the **Send Mail** icon for an announcement is clicked.

Figure 25–18 Mail Window from an Announcement Send Mail Action

25.2.4 Linking Announcements

Each announcement that you open from the Announcements - Quick View or in the Announcement Manager has an associated **Links** icon in its toolbar to link other assets to the announcement. For example, you can link an announcement to a *new* discussion, document, event, note or URL, or you can link an announcement to an *existing* announcement, discussion, document, or event.

The **Links** icon displays to all users accessing the Announcements and Announcement Manager views, if the Links feature is enabled in the portal.

Note: For more information about working with links, see [Chapter 32, "Linking Information in WebCenter Portal."](#)

[Figure 25–19](#) shows the Links icon that is available when you open an announcement from the Announcements - Quick View.

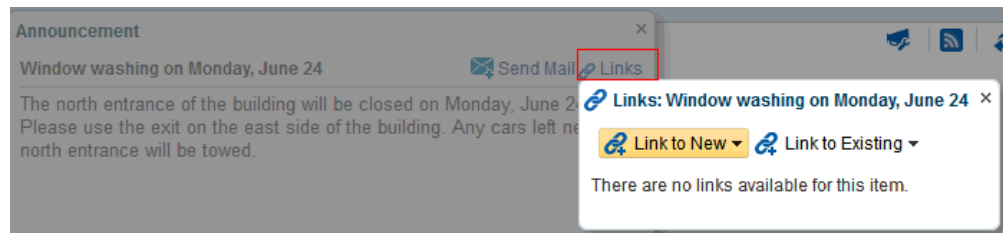
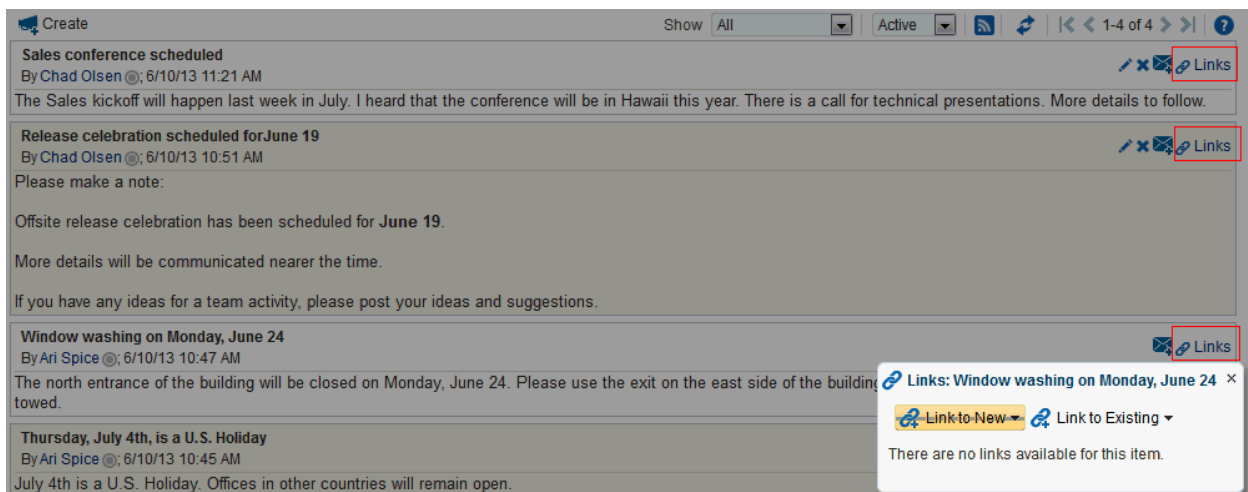
Figure 25–19 Links Icon in an Announcement - Quick View

Figure 25–20 shows the Links icons that are available in an announcement view.

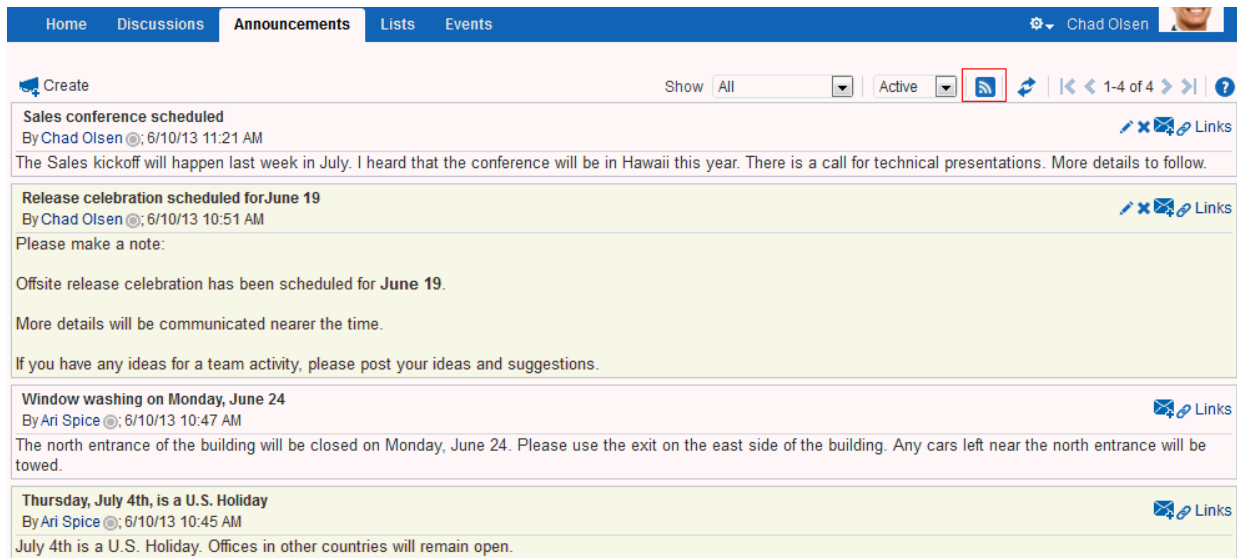
Figure 25–20 Links Icons in an Announcement View

25.2.5 Subscribing to Announcements Using RSS

If RSS is enabled in the portal, you can subscribe to announcements using an RSS Viewer.

Figure 25–21 shows an **Announcements** page with the RSS icon.

Figure 25–21 RSS Icon in Announcements



For more information about subscribing to announcements, see [Section 27.2.4, "Obtaining the Announcements News Feed."](#)

Working with Polls

This chapter describes how WebCenter Portal users can take polls and view poll results.

This chapter includes the following topics:

- [Section 26.1, "Taking Polls"](#)
- [Section 26.2, "Viewing Poll Results"](#)

Permissions: This chapter is intended for WebCenter Portal users interested in taking polls. The tasks described in this chapter are available to any WebCenter Portal user with access to a page that contains a poll.

Note: Tasks discussed in this chapter are not available to you if a polls viewer is not exposed on a page. The portal moderator can create, edit, analyze, and manage polls, and add the polls viewer to a page, as described in the "Adding Polls to a Portal" chapter in *Building Portals with Oracle WebCenter Portal*.

26.1 Taking Polls

To take a poll, simply select or enter your choice, and click **Vote**.

The Take Polls ([Figure 26-1](#)) and Quick Poll ([Figure 26-2](#)) views display the most recently-published available poll, or the poll set by your portal moderator. After you submit a response for that poll, the next most recently-published poll displays.

Figure 26-1 Taking Polls

Take Polls ⚙️

We want to reward our best!

Which incentive is the most desirable to you?

- Vacation days/time off
- Gift cards
- Stock options
- Bonuses
- Recognition
- Raise
- Flexible time

Figure 26–2 Quick Poll

Quick Poll

What percent of your work is complete as of today?

100%

80%

60%

40%

20%

Comments:

[Vote](#)

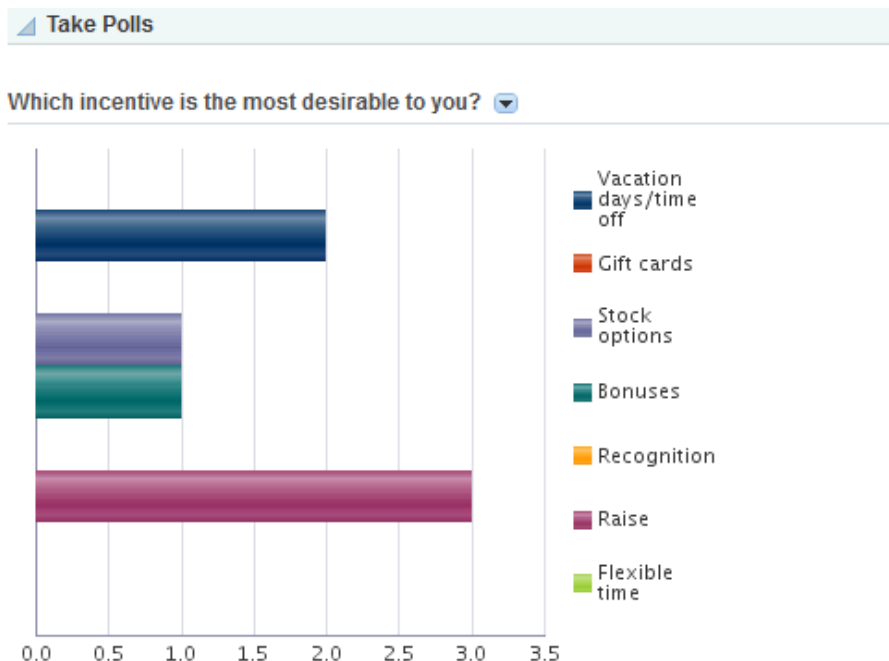
26.2 Viewing Poll Results

The View Poll Results view provides a graphical view of poll results (Figure 26–3), if the poll closing option is set to show this option. The poll that displays is set by your portal moderator.

To see the latest poll results, click the **Refresh** icon (Figure 26–3).

Note: Do not click the Reload or Refresh button in your browser. Click the **Refresh** icon to update your view.

Click **View Summary** to see a response percent and the response count, including consolidated comments if the poll includes a field for poll takers to add comments.

Figure 26–3 View Poll Results

Monitoring RSS Feeds

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 27.1, "About RSS"](#)
- [Section 27.2, "Obtaining Tool News Feeds"](#)
- [Section 27.3, "Refreshing RSS"](#)
- [Section 27.4, "Removing RSS Feeds"](#)

Permissions: This chapter is intended for WebCenter Portal users interested in publishing news feeds from WebCenter Portal and external sources. The tasks described in this chapter are available to any WebCenter Portal user.

To view RSS feeds from other features, such as announcements and discussions, you must have the required permissions for those features.

Note: The portal moderator has the authority to expose or hide some portal features, such as RSS news feeds, as described in the "Enabling or Disabling RSS News Feeds for a Portal" section in *Building Portals with Oracle WebCenter Portal*.

The portal moderator adds and configures RSS feeds, as described in the "Adding RSS Feeds to a Portal" section in *Building Portals with Oracle WebCenter Portal*.

27.1 About RSS

RSS exposes its features in the following ways:

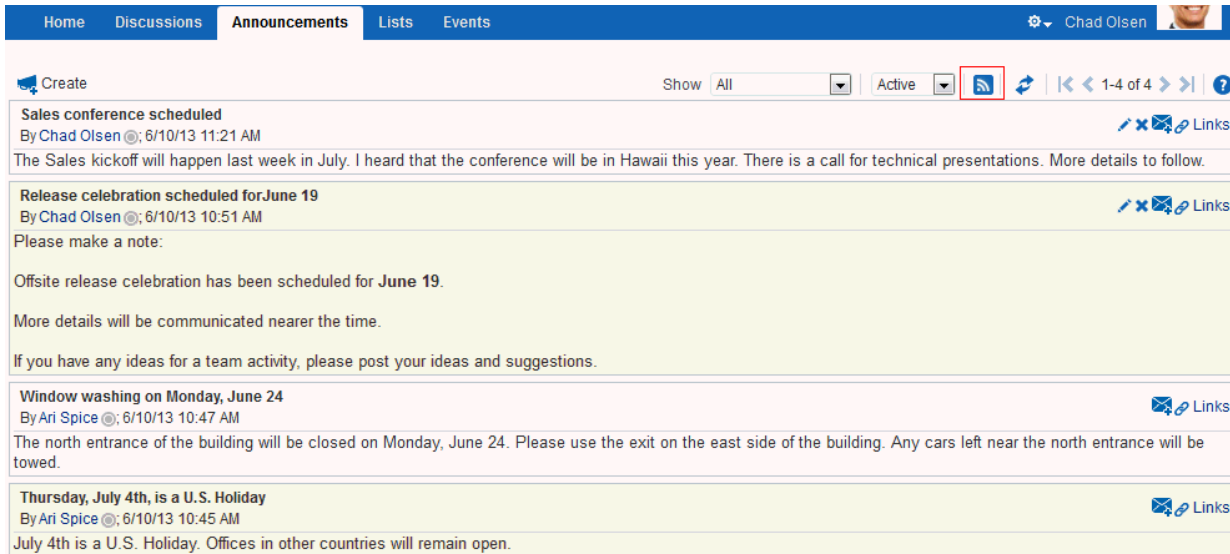
- [Section 27.1.1, "RSS Icon"](#)
- [Section 27.1.2, "RSS Manager"](#)
- [Section 27.1.3, "RSS View"](#)

27.1.1 RSS Icon

RSS news feeds deliver updated content information on discussions, lists, and announcements. [Figure 27–1](#) shows the **RSS** icon available in announcements on the Announcements page or console.

Note: The RSS icon is not available if the portal moderator has not enabled RSS in the portal.

Figure 27–1 RSS Icon in Announcements



27.1.2 RSS Manager

In a WebCenter Portal, you can obtain news feeds in two ways:

- From features, such as announcements, discussions, activity stream, lists, as described in [Section 27.2, "Obtaining Tool News Feeds."](#)
- From external feeds using the RSS Manager, as described in [Section 27.1.3, "RSS View."](#)

Accessing the RSS Manager

You can access the RSS Manager by clicking the **RSS** link at the bottom of WebCenter Portal ([Figure 27–2](#)).

Note: The RSS link is not available if the portal moderator has not enabled RSS in the portal. See the "Adding RSS Feeds to a Portal" section in *Building Portals with Oracle WebCenter Portal*.

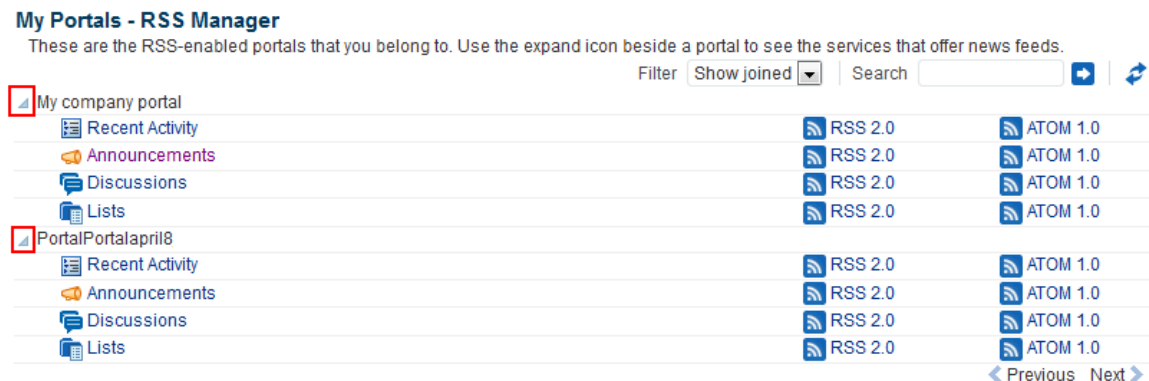
Figure 27–2 RSS Link in a Portal



Using the RSS Manager

The RSS Manager displays nodes for all the portals for which RSS feeds have been enabled (Figure 27-3).

Figure 27-3 Expanded Portal Nodes in the RSS Manager



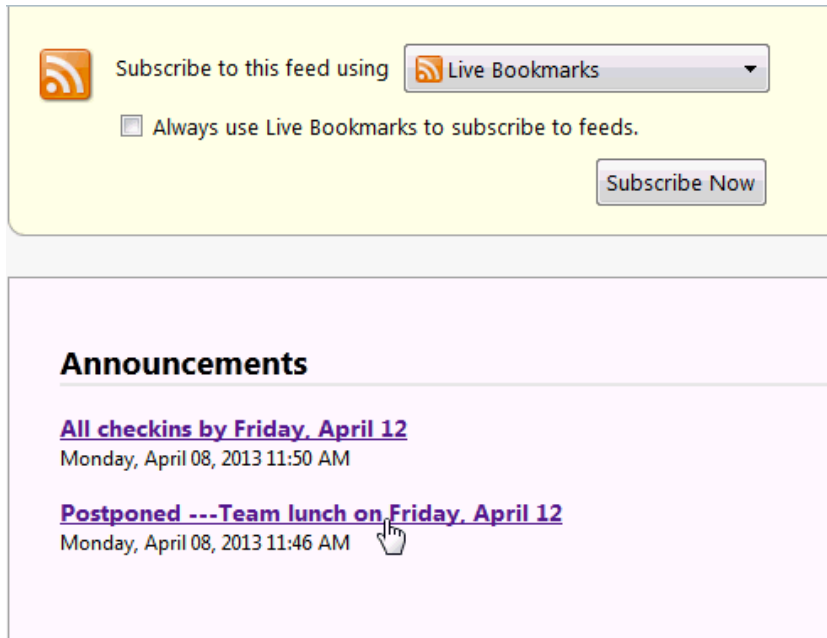
Expand a portal node to obtain both RSS 2.0 and Atom 1.0 news feeds from individual tools.

Your portal moderator must enable RSS news feed for a portal before you can obtain feed URLs from it. For more information, see the "Enabling or Disabling RSS News Feeds for a Portal" section in *Building Portals with Oracle WebCenter Portal*. Additionally, your reader of choice must support HTTP authentication.

When you access a news feed item in your reader of choice, the item links back into WebCenter Portal. Because WebCenter Portal itself requires authentication before you can access much of its content, your reader must be equipped to pass your login credentials to securely deliver access.

The level of detail provided through a tool news feed depends on the feed source. For example, when you pull a news feed for recently added or modified announcements, your news reader provides the announcement titles and (if available) shows descriptions of the most recently added or modified announcements (Figure 27-4).

Figure 27–4 An Announcement News Feed



The announcement titles in a feed are linked. Click an announcement title, and it takes you back into your portal with the selected announcement content displayed (Figure 27–5).

Figure 27–5 An Announcement Opened from an RSS Feed and Displayed in a Portal



In contrast, when you pull a news feed from a particular list, it shows recently added or revised row details and provides links to individual rows. When you click such a link, it also takes you back into your portal, with the list content displayed.

The news feeds you obtain from WebCenter Portal are context-aware, providing content only from the portal from which they originate. For example, if you provide a list feed from the *Finance* portal, your news reader displays list content that is unique to the *Finance* portal. If you add a list feed from the *Languages* portal, your news reader displays list content that is unique to the *Languages* portal.

RSS delivers news feeds from the following tools:

- **Recent Activities**

The recent activity news feed tracks updates to your portal that are normally reflected in a Recent Activity list and that have occurred within the last three days. See [Section 27.2.1, "Obtaining the Recent Activities News Feed"](#) for more information.

- **Discussions**

The discussion forums news feed tracks updates to all discussion forums in a particular portal. See [Section 27.2.2, "Obtaining the Discussion Forums News Feed"](#) for more information.

- **Lists**

There are two types of news feeds that can be delivered from lists—all newly created or changed lists in a portal and revisions to the data of a particular list in a portal (from the Lists page). The news feed content depends on where you get the news feed URL. See [Section 27.2.3, "Obtaining List News Feeds"](#) for more information.

- **Announcements**

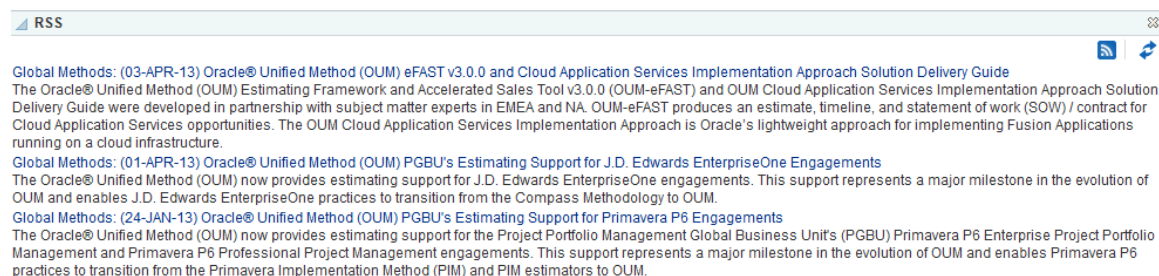
The announcements news feed tracks additions and revisions to announcements from a particular portal, from all portals, or application-wide, depending on the location of the feed source. See [Section 27.2.4, "Obtaining the Announcements News Feed"](#) for more information.

You can obtain news feed URLs for all applicable tools either from the RSS Manager or from the appropriate tool.

27.1.3 RSS View

RSS allows you to view a news feed from a site external to your portal ([Figure 27–6](#)).

Figure 27–6 RSS View



Your portal moderator can configure RSS to display content from any external RSS feed. See the "Editing the Feed Location of an RSS Task Flow" section in *Building Portals with Oracle WebCenter Portal*. Additionally, WebCenter Portal supports login credential passing, by using an external application. See [Section 5.7, "Providing Login Information for External Applications."](#)

Accessing External Applications

Each time you access a secure news feed item, you must log on to that secure application to view content. You can either supply login credentials each time you access an application, or let an external application store and manage your login credentials. After your credentials for a particular application are stored, you are logged in to that application automatically when you log in to WebCenter Portal. You can provide this capability for all frequently used external applications.

Perform the steps listed in [Section 5.7, "Providing Login Information for External Applications"](#) if the secured application you want to access is not registered as an external application.

27.2 Obtaining Tool News Feeds

Each participating tool provides news feeds from locations unique to that tool.

This section steps you through obtaining those feeds. It includes the following topics:

- [Section 27.2.1, "Obtaining the Recent Activities News Feed"](#)
- [Section 27.2.2, "Obtaining the Discussion Forums News Feed"](#)
- [Section 27.2.3, "Obtaining List News Feeds"](#)
- [Section 27.2.4, "Obtaining the Announcements News Feed"](#)

27.2.1 Obtaining the Recent Activities News Feed

Use news feeds from recent activities to keep track of the wide range of activity happening in one or more portals within the last three days. To consume a portal's Recent Activities news feed, you must be a member of the selected portal and the portal must be enabled to provide news feeds.

WebCenter Portal provides two locations for pulling a news feed from recent activities: the RSS Manager and the Recent Activity view.

Both the RSS Manager and the Recent Activity viewer provide the same news feed content: additions or revisions to portals and portal pages, documents, discussion forums, lists, and so on.

Assuming a default configuration, a news feed URL from a Recent Activity view in a portal provides information about the activity in that portal. A news feed URL from a Recent Activity view in your Home portal provides information about the activities in a particular portal.

This section describes how to obtain a news feed for recent activities from both the locations, the RSS Manager and the Recent Activity view. It contains the following topics:

- [Section 27.2.1.1, "Obtaining a Recent Activity News Feed URL from the RSS Manager"](#)
- [Section 27.2.1.2, "Obtaining a News Feed URL from the Recent Activity View"](#)

27.2.1.1 Obtaining a Recent Activity News Feed URL from the RSS Manager

The RSS Manager provides news feeds for both RSS 2.0 and Atom 1.0 news readers. It lists all RSS-enabled portals of which you are a member. Each listed portal can be expanded to display the tools for which it offers news feeds ([Figure 27-7](#)).

Figure 27-7 Recent Activity for a Portal in the RSS Manager

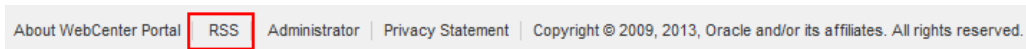


To obtain a Recent Activity list news feed URL from the RSS Manager:

1. Click the **RSS** link at the bottom of WebCenter Portal ([Figure 27-8](#)).

Note: The RSS link is not available if the portal moderator has not enabled RSS in the portal.

Figure 27–8 RSS Link



2. If required, expand the node of the portal for which you want to monitor recent activities.

You can expand a portal node by clicking the **Expand** icon or by right-clicking the portal name and selecting the **Expand** option from the resulting context menu.

3. Under the relevant portal, right-click the **RSS 2.0** or **Atom 1.0** icon next to **Recent Activity**, and, from the resulting browser context menu, select the copy-link command.

The command you select depends on your current browser. For example, in the Firefox browser, the copy-link command is **Copy Link Location**. In the Internet Explorer browser, the copy-link command is **Copy Shortcut**.

4. Go to your news reader and initiate an add-subscription action.

How you do this depends on the news reader you use.

5. Paste the link you copied in step 3 into the relevant field in your news reader.

You may need to enter your WebCenter Portal credentials. See [Section 27.1, "About RSS"](#) for more information.

27.2.1.2 Obtaining a News Feed URL from the Recent Activity View

The Recent Activity view has its own **RSS** icon. Using this icon, you can get the Recent Activity list news feed URL. Recent Activity RSS feeds provide the same information that you can find in a Recent Activity list. This includes additions or revisions to pages, documents, discussion forums, lists, and so on. The news feed tracks activity occurring over the last three days.

For an **RSS** icon to be active in a Recent Activity view, you must be a member of the portal from which you want to obtain the news feed and news feeds must be enabled for the relevant portal.

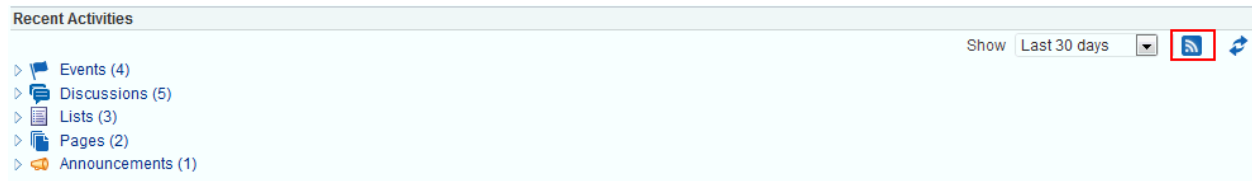
To obtain a Recent Activity list news feed URL from the Recent Activity list:

1. Go to the Home portal or the portal that contains the Recent Activity list from which you want to obtain an RSS feed.

See [Section 10.4, "Viewing and Accessing Available Portals"](#) for information about navigating to a portal.

2. Right-click the **RSS** icon in the toolbar of the Recent Activity list ([Figure 27–9](#)), and from the resulting context menu, select the copy-link command.

The command you select depends on your current browser. For example, in the Firefox browser, the copy-link command is **Copy Link Location**. In the Internet Explorer browser, the copy-link command is **Copy Shortcut**.

Figure 27–9 RSS Icon in Recent Activities

Alternatively, drag the **RSS** icon onto your news reader of choice. This may allow you to omit the other steps in this procedure. If you use the drag-and-drop method, you may have to enter your WebCenter Portal credentials. See [Section 27.1, "About RSS"](#) for more information.

3. Go to your RSS reader and initiate an add-subscription action.
How you do this depends on the RSS reader you use.
4. Paste the link you copied in step 2 into the relevant field in your RSS reader.

Note: The news feed URL in a Recent Activity view is for RSS 2.0 news readers only. If you prefer to use an Atom 1.0 news reader, do either of the following:

- Append `&format=ATOM1.0` to the RSS news feed URL you pasted.
 - Get the Atom 1.0 URL from the RSS Manager and use that URL here. See [Section 27.2.1.1, "Obtaining a Recent Activity News Feed URL from the RSS Manager"](#) for more information.
-

You may need to enter your WebCenter Portal credentials. See [Section 27.1, "About RSS"](#) for more information.

27.2.2 Obtaining the Discussion Forums News Feed

Use discussion forum news feeds to keep track of additions and revisions to a selected portal's discussions. There are three locations from which to obtain discussion forums news feed URLs: the RSS Manager, the Discussions page (or console), and the Discussion Forums view. All discussion RSS and Atom URLs provide the same feed; that is, additions and revisions to all discussions in a selected portal.

This section contains the following topics:

- [Section 27.2.2.1, "Obtaining a Discussion Forum News Feed from the RSS Manager"](#)
- [Section 27.2.2.2, "Obtaining a News Feed from the Discussions Page"](#)
- [Section 27.2.2.3, "Obtaining a News Feed from a Discussion Forums View"](#)

27.2.2.1 Obtaining a Discussion Forum News Feed from the RSS Manager

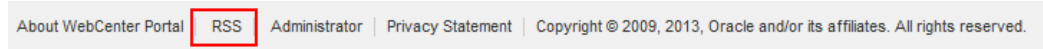
The RSS Manager provides discussion forum news feeds for both RSS 2.0 and Atom 1.0 news readers. Select a feed from any news-feed-enabled portal of which you are a member. Use discussion forum news feeds to track additions and revisions to a selected portal's discussion forums.

To obtain a discussion forum news feed URL from the RSS Manager:

1. Click the **RSS** link at the bottom of WebCenter Portal ([Figure 27–10](#)).

Note: The RSS link is not available if the portal moderator has not enabled RSS in the portal.

Figure 27–10 RSS Link



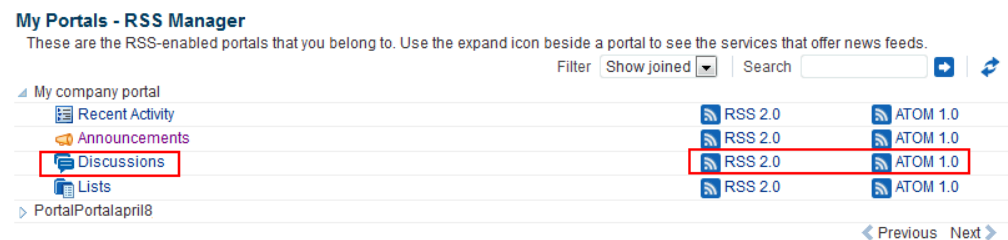
2. In RSS Manager, if required, expand the node of the portal that contains the discussions you want to use as a news feed.

You can expand a portal node by clicking the **Expand** icon to the left of it or by right-clicking the portal name and selecting an expand option from the resulting context menu.

3. Right-click the **RSS 2.0** or **Atom 1.0** icon next to **Discussions** (Figure 27–11), and, from the resulting context menu, select the copy-link command.

For example, in the Firefox browser, the copy-link command is **Copy Link Location**. In the Internet Explorer browser, the copy-link command is **Copy Shortcut**.

Figure 27–11 RSS 2.0 and Atom 1.0 Icons Next to a Discussions Node in the RSS Manager



Alternatively, if you drag the **RSS** icon onto a news reader, you can avoid most of the other steps. You may need to enter your WebCenter Portal credentials. See [Section 27.1, "About RSS"](#) for more information.

4. Go to your news reader and initiate an add-subscription action.
How you do this depends on the news reader you use.
5. Paste the link you copied in step 3 into the relevant field in your preferred news reader.

You may need to enter your WebCenter Portal credentials. See [Section 27.1, "About RSS"](#) for more information.

27.2.2.2 Obtaining a News Feed from the Discussions Page

The Discussions page (or console) provides a convenient location for grabbing a news feed URL while monitoring discussions.

To get an RSS URL for all discussions of a portal from the Discussions page:

1. Go to the portal that contains the discussion forums you want to use as an RSS feed.
2. Click **Discussions** on the navigation bar to open the Discussions page (or console).

The Discussions page is available in a portal if Discussions is enabled and a Discussions page has been added by the portal moderator. For information about enabling tools in a portal, see the "Enabling and Disabling Tools and Services Available to a Portal" section in *Building Portals with Oracle WebCenter Portal*.

If the Discussions page is not shown, you can open the Personalize Pages page to show the Discussions page in your view of the portal. See [Section 10.12.1, "Showing or Hiding Pages in Your View of a Portal"](#) for more information. To expose the Discussions page to all portal members, the portal moderator needs to add the page link to the portal navigation, as described in the "Adding an Existing Page to the Portal Navigation" section in *Building Portals with Oracle WebCenter Portal*.

3. Right-click the **RSS** icon on the Discussions page ([Figure 27-12](#)), and from the resulting context menu, select the copy-link command.

Note: The RSS icon is not available if the portal moderator has not enabled RSS in the portal.

For example, in the Firefox browser, the copy-link command is **Copy Link Location**. In the Internet Explorer browser, the copy-link command is **Copy Shortcut**.

Figure 27-12 RSS Icon on a Discussions Page



Alternatively, if you drag the **RSS** icon onto your news reader, you can avoid most of the other steps. You may need to enter your WebCenter Portal credentials. See [Section 27.1, "About RSS"](#) for more information.

4. Go to your RSS reader and initiate an add-subscription action.
How you do this depends on the RSS reader you use.
5. Paste the link you copied in step 3 into the relevant field in your preferred RSS reader.

You may need to enter your WebCenter Portal credentials. See [Section 27.1, "About RSS"](#) for more information.

Note: The news feed URL on the Discussions page is for RSS 2.0 news readers only. If you prefer to use an Atom 1.0 news reader, then do either of the following:

- Append `&format=ATOM1.0` to the RSS news feed URL you pasted.
 - Get the Atom 1.0 URL from the RSS Manager and use that URL here. See [Section 27.2.2, "Obtaining the Discussion Forums News Feed"](#) for more information.
-

27.2.2.3 Obtaining a News Feed from a Discussion Forums View

The Discussion Forums view provides another location from where you can obtain a discussions news feed for a selected portal. The placement of this view within a portal is at the discretion of the portal's moderator. But, wherever you find it, an **RSS** icon is available to provide you with an RSS news feed URL. This section describes how to use it.

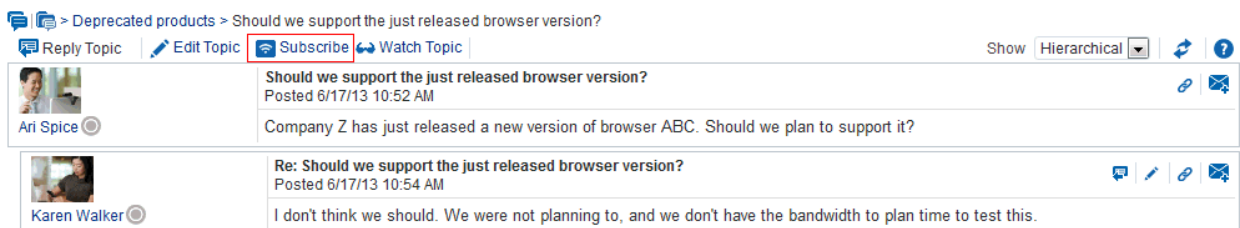
To obtain a news feed URL from a Discussion Forums view:

1. Go to the page in the portal that contains discussion forums.
2. Right-click the **RSS** icon on the view ([Figure 27-13](#)), and, from the resulting context menu, select the copy-link command.

Note: The RSS icon is not available if the portal moderator has not enabled RSS in the portal.

For example, in the Firefox browser, the copy-link command is **Copy Link Location**. In the Internet Explorer browser, the copy-link command is **Copy Shortcut**.

Figure 27-13 RSS Icon in a Discussion Forums View



Alternatively, if you drag the **RSS** icon onto your news reader, you can avoid most of the other steps.

You may need to enter your WebCenter Portal credentials. See [Section 27.1, "About RSS"](#) for more information.

3. Go to your RSS reader and initiate an add-subscription action.
How you do this depends on the RSS reader you use.
4. Paste the link you copied in step 2 into the relevant field in your preferred RSS reader.

Note: The news feed URL in the Discussions view is for RSS 2.0 news readers only. If you prefer to use an Atom 1.0 news reader, do either of the following:

- Append `&format=ATOM1.0` to the RSS news feed URL you pasted.
 - Get the Atom 1.0 URL from the RSS Manager and use that URL here. See [Section 27.2.2, "Obtaining the Discussion Forums News Feed"](#) for more information.
-
-

You may need to enter your WebCenter Portal credentials. See [Section 27.1, "About RSS"](#) for more information.

27.2.3 Obtaining List News Feeds

Lists provide a vital form of tracking that can be used to track just about everything within an organization. For example, a group might want a membership list that outlines assigned roles and contact information. A project lead might set up a list that tracks issue resolution.

It follows that it would be useful to track creation of and revisions to such lists from one convenient location: your favorite news reader.

Lists provides two options for keeping track of changes through a news reader:

- Keep track of all recently added or modified lists in a given portal.
- Keep track of recently added or modified data rows in a given list.

You can obtain the news feed URL for lists from three locations: the RSS Manager, the Lists page, and any Lists view on a given page. The RSS Manager and the Lists page provide access to both types of Lists feeds. Individual List views provide feeds for data changes to the rows of the displayed list.

This section describes how to obtain a news feed for recently added or modified list rows or lists from a selected portal. It includes the following topics:

- [Section 27.2.3.1, "Obtaining a List News Feed from the RSS Manager"](#)
- [Section 27.2.3.2, "Obtaining a News Feed from the Lists Page"](#)
- [Section 27.2.3.3, "Obtaining a News Feed from Lists"](#)

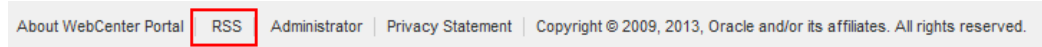
27.2.3.1 Obtaining a List News Feed from the RSS Manager

The RSS Manager provides two types of list news feeds: a feed of recently added or revised lists in a portal and a feed of recent data changes to the rows of one particular list. Additionally, the RSS Manager provides feeds for an RSS 2.0 reader and an Atom 1.0 reader. The main requirement for any news reader you use is that it supports HTTP authentication (for more information, see [Section 27.1, "About RSS"](#)).

To obtain a list news feed from the RSS Manager:

1. Click the **RSS** button at the bottom of WebCenter Portal ([Figure 27-14](#)).

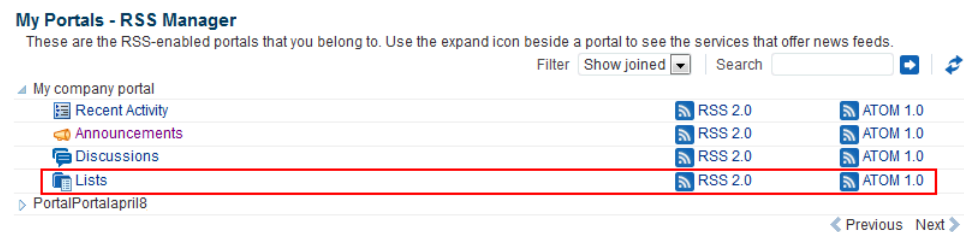
Note: The RSS link is not available if the portal moderator has not enabled RSS in the portal.

Figure 27-14 RSS Link

2. In the **RSS Manager**, expand the node for the portal that contains the lists from which to obtain an RSS feed.
3. Right-click the **RSS 2.0** or **Atom 1.0** icon next to **Lists** to get RSS feeds for all lists in the portal (Figure 27-15), and from the resulting context menu, select the copy-link command.

Note: The RSS icon is not available if the portal moderator has not enabled RSS in the portal.

For example, in the Firefox browser, the copy-link command is **Copy Link Location**. In the Internet Explorer browser, the copy-link command is **Copy Shortcut**.

Figure 27-15 Lists Node on the RSS Manager Page

Alternatively, if you drag the news feed icon onto your reader you can omit most of the other steps. You may need to enter your WebCenter Portal credentials. See [Section 27.1, "About RSS"](#) for more information.

4. Go to your RSS reader and initiate an add-subscription action.
How you do this depends on the RSS reader you use.
5. Paste the link you copied in step 3 into the relevant field in your preferred RSS reader.

You may need to enter your WebCenter Portal credentials. See [Section 27.1, "About RSS"](#) for more information.

27.2.3.2 Obtaining a News Feed from the Lists Page

The Lists page is available in a portal if Lists is enabled and the Lists page (or console) has been added by the portal moderator. For information about enabling tools in a portal, see the "Enabling and Disabling Tools and Services Available to a Portal" section in *Building Portals with Oracle WebCenter Portal*.

If Lists is enabled and the page (or console) added to the portal, the Lists page contains all the lists available in your portal. As you navigate through portal pages in your WebCenter Portal, you may come across a list you find particularly informative, for example, a list of project issues. It may be useful to you to track recent additions and revisions to such a list. Each list comes with its own RSS news feed, making it easy to subscribe to the list.

This section describes how to obtain news feed URLs from the Lists page (or console). Note that the Lists page provides news feeds for RSS 2.0 readers only. If you want to obtain a feed for an Atom 1.0 news reader, use the RSS Manager.

To obtain a news feed from the Lists page:

1. Go to the portal that contains the list you want to track.
2. Navigate to the Lists page or console (if available) and open the required list.

If the Lists page (or console) is not shown, you can open the Personalize Pages page to show the Lists page in your view of the portal. See [Section 10.12.1, "Showing or Hiding Pages in Your View of a Portal"](#) for more information. To expose the Lists page to all portal members, the portal moderator needs to add the page link to the portal navigation, as described in the "Adding an Existing Page to the Portal Navigation" section in *Building Portals with Oracle WebCenter Portal*.

3. Right-click the **RSS** icon ([Figure 27–16](#)), and from the resulting context menu, select the copy-link command.

Note: The RSS icon is not available if the portal moderator has not enabled RSS in the portal.

For example, in the Firefox browser, the copy-link command is **Copy Link Location**. In the Internet Explorer browser, the copy-link command is **Copy Shortcut**.

Figure 27–16 A List on the Lists Page

No.	Description	Target Date	Assigned	Status	UX snapshot
22222	Change Apply buttons to Save on all dialogs	6/26/13 12:00 AM	Wendy Devmore	Open	
1222	Add banner text to all consoles	6/28/13 12:00 AM	Ari Spice	Open	
2315	Create first draft of beta plan	7/1/13 12:00 AM	Chad Olsen	Open	
3262	Add updated features list to project portal	6/18/13 12:00 AM	Chad Olsen	Open	

Alternatively, if you drag the news feed icon onto your reader you can omit most of the other steps. You may need to enter your WebCenter Portal credentials. See [Section 27.1, "About RSS"](#) for more information.

4. Go to your RSS reader and initiate an add-subscription action.
How you do this depends on the RSS reader you use.
5. Paste the link you copied in step 3 into the relevant field in your preferred RSS reader.

Note: The news feed URL on the Lists page is for RSS 2.0 news readers only. If you prefer to use an Atom 1.0 news reader, do either of the following:

- Append `&format=ATOM1.0` to the RSS news feed URL you pasted.
 - Get the Atom 1.0 URL from the RSS Manager and use that URL here. See [Section 27.2.3.1, "Obtaining a List News Feed from the RSS Manager"](#) for more information.
-

You may need to enter your WebCenter Portal credentials. See [Section 27.1, "About RSS"](#) for more information.

27.2.3.3 Obtaining a News Feed from Lists

Each Lists view provides RSS news feeds for recent additions and revisions to all of the lists it contains and also for recent data changes to the rows of an individual list.

To obtain a news feed from a Lists view:

1. Go to the portal that contains the list you want to track.
2. To obtain a news feed of data changes to the rows of an individual list, display the list in the right pane by selecting the list name from the left pane ([Figure 27-17](#)), then right-click the **RSS** icon in the right pane, and select the copy-link command from the resulting context menu.

Note: The RSS icon is not available if the portal moderator has not enabled RSS in the portal.

For example, in the Firefox browser, the copy-link command is **Copy Link Location**. In the Internet Explorer browser, the copy-link command is **Copy Shortcut**.

Figure 27-17 A List view

Date	Description	Status	
4/1/13	Project kickoff	Completed	
4/1/13	Send out project plan for review	Completed	
4/2/13	Assign resources	Completed	
4/17/13	Draft requirements list	In Progress	
4/30/13	Update project plan; get signoffs	In Progress	
5/31/13	Build test cases	Not yet started	

Alternatively, if you drag the **RSS** icon onto your news reader you can omit most of the other steps. You may need to enter your WebCenter Portal credentials. See [Section 27.1, "About RSS"](#) for more information.

3. Go to your RSS reader and initiate an add-subscription action.
How you do this depends on the RSS reader you use.
4. Paste the link you copied in step 2 into the relevant field in your preferred RSS reader.

Note: The news feed URL in the List view is for RSS 2.0 news readers only. If you prefer to use an Atom 1.0 news reader, do either of the following:

- Append `&format=ATOM1.0` to the RSS news feed URL you pasted.
 - Get the Atom 1.0 URL from the RSS Manager and use that URL here. See [Section 27.2.3.1, "Obtaining a List News Feed from the RSS Manager"](#) for more information.
-
-

You may need to enter your WebCenter Portal credentials. See [Section 27.1, "About RSS"](#) for more information.

27.2.4 Obtaining the Announcements News Feed

Announcements are excellent candidates for news feeds. Usually they are short, concise, and full of timely and valuable information. If you are a member of multiple portals, it would be convenient to be able to access all announcements from one location: your favorite news reader.

You can obtain an announcement news feed from three locations: the RSS Manager, the Announcements page (or console), and an Announcements view.

This section contains the following topics:

- [Section 27.2.4.1, "Obtaining an Announcements News Feed from the RSS Manager"](#)
- [Section 27.2.4.2, "Obtaining a News Feed from the Announcements Page"](#)
- [Section 27.2.4.3, "Obtaining a News Feed from the Announcements View"](#)

27.2.4.1 Obtaining an Announcements News Feed from the RSS Manager

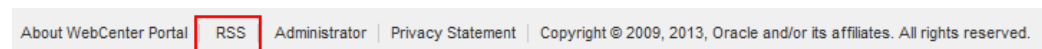
The RSS Manager provides two types of feeds for announcements: RSS 2.0 and Atom 1.0. Use either of these to keep track of all new and revised announcements in a particular portal.

To obtain an Announcements news feed from the RSS Manager:

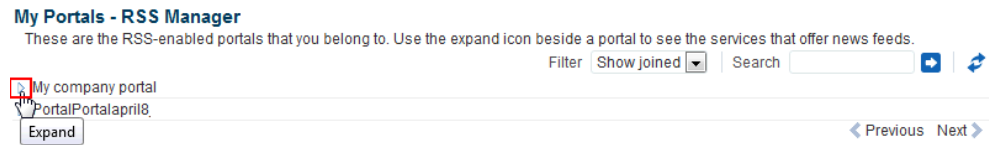
1. Click the **RSS** link at the bottom of WebCenter Portal ([Figure 27-18](#)).

Note: The RSS link is not available if the portal moderator has not enabled RSS in the portal.

Figure 27-18 *RSS Link*

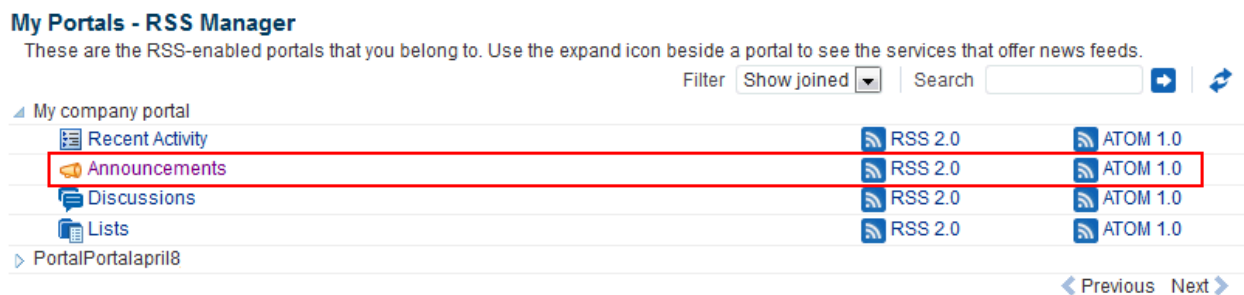


2. In the **RSS Manager**, expand the node for the portal that contains the announcements you want to track through a news reader ([Figure 27-19](#)).

Figure 27–19 Expanding the Portal Node

3. Right-click the **RSS 2.0** or **Atom 1.0** icon next to **Announcements** (Figure 27–20), and, from the resulting context menu, select the copy-link command.

For example, in the Firefox browser, the copy-link command is **Copy Link Location**. In the Internet Explorer browser, the copy-link command is **Copy Shortcut**.

Figure 27–20 Announcements Node on the RSS Page

Alternatively, if you drag the news feed icon onto your reader, you can omit most of the other steps. You may need to enter your WebCenter Portal credentials. See [Section 27.1, "About RSS"](#) for more information.

4. Go to your RSS reader and initiate an add-subscription action.
How you do this depends on the RSS reader you use.
5. Paste the link you copied in step 3 into the relevant field in your preferred RSS reader.

You may need to enter your WebCenter Portal credentials. See [Section 27.1, "About RSS"](#) for more information.

27.2.4.2 Obtaining a News Feed from the Announcements Page

The Announcement Manager is exposed from the Announcements page (or console) in WebCenter Portal. You can use it to create and revise announcements and to obtain an announcements news feed URL.

Unlike the RSS Manager, the Announcement Manager provides a news feed only for RSS 2.0 news readers. If you prefer an Atom 1.0 feed, use the RSS Manager to obtain the feed URL. See [Section 27.2.4.1, "Obtaining an Announcements News Feed from the RSS Manager"](#) for more information.

To obtain a news feed from the Announcements page:

1. Open the Announcements page or console.

The Announcements page (or console) is available in a portal if Announcements is enabled and the Announcements page has been added by the portal moderator. For information about enabling tools in a portal, see the "Enabling and Disabling

Tools and Services Available to a Portal" section in *Building Portals with Oracle WebCenter Portal*.

If the Announcements page (or console) is not shown, you can open the Personalize Pages page to show the Announcements page in your view of the portal. See [Section 10.12.1, "Showing or Hiding Pages in Your View of a Portal"](#) for more information. To expose the Announcements page to all portal members, the portal moderator needs to add the page link to the portal navigation, as described in the "Adding an Existing Page to the Portal Navigation" section in *Building Portals with Oracle WebCenter Portal*.

For information about announcements, see [Chapter 25, "Working with Announcements."](#)

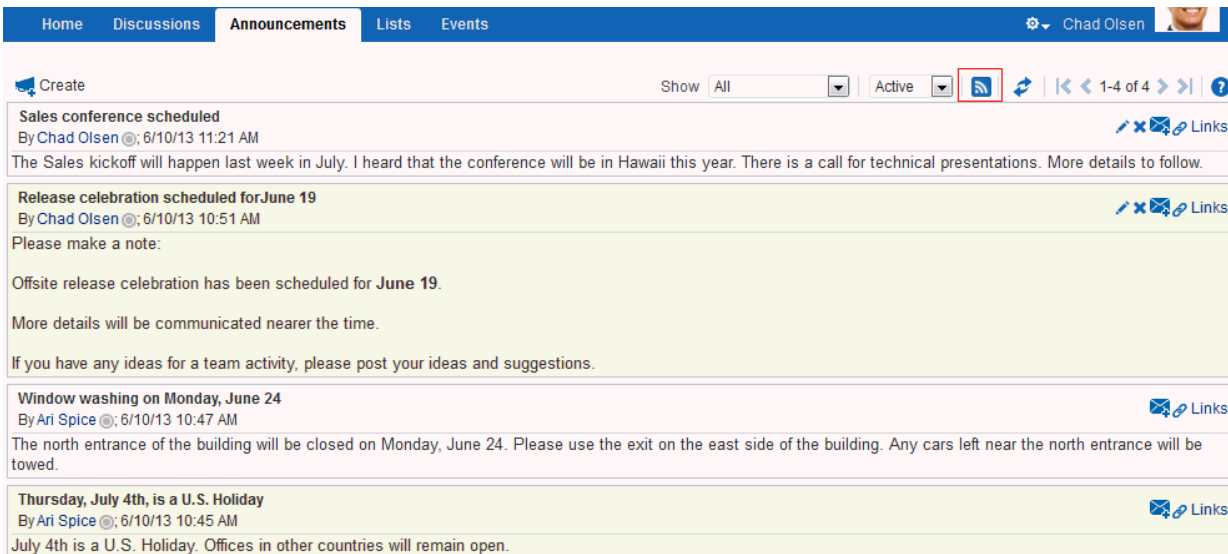
Note: You can also access the Announcement Manager by clicking the **Open Announcement Manager** icon in the Announcements view. This icon is not displayed in the Announcements view if you do not have the required privileges.

2. Right-click the **RSS** icon on the right on the Announcements page or console ([Figure 27–21](#)), and select the copy-link command from the resulting context menu.

Note: The RSS icon is not available if the portal moderator has not enabled RSS in the portal.

For example, in the Firefox browser, the copy-link command is **Copy Link Location**. In the Internet Explorer browser, the copy-link command is **Copy Shortcut**.

Figure 27–21 RSS Icon on the Announcements Page



Alternatively, if you drag the news feed icon onto your reader, you can omit most of the other steps. You may need to enter your WebCenter Portal credentials. See [Section 27.1, "About RSS"](#) for more information.

3. Go to your RSS reader and initiate an add-subscription action.
How you do this depends on the RSS reader you use.
4. Paste the link you copied in step 2 into the relevant field in your preferred RSS reader.

Note: The news feed URL on the Announcements page is for RSS 2.0 news readers only. If you prefer to use an Atom 1.0 news reader, do either of the following:

- Append `&format=ATOM1.0` to the RSS news feed URL you pasted.
 - Get the Atom 1.0 URL from the RSS Manager and use that URL here. See [Section 27.2.4.1, "Obtaining an Announcements News Feed from the RSS Manager"](#) for more information.
-

You may need to enter your WebCenter Portal credentials. See [Section 27.1, "About RSS"](#) for more information.

27.2.4.3 Obtaining a News Feed from the Announcements View

Announcements also provide access to a news feed URL. Like the Announcements page, the view provides feeds only for RSS 2.0 news readers. If you prefer an Atom 1.0 feed, use the RSS Manager to obtain the feed URL. See [Section 27.2.4.1, "Obtaining an Announcements News Feed from the RSS Manager"](#) for more information.

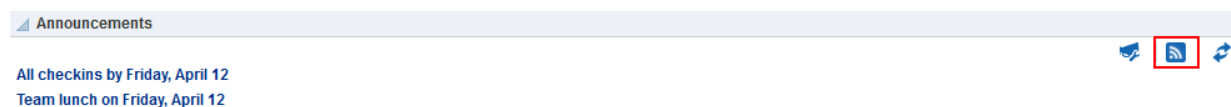
To obtain a news feed from the Announcements view:

1. Go to the page that contains the Announcements view.
2. Right-click the **RSS** icon on the Announcements view ([Figure 27–22](#)), and select the copy-link command from the resulting context menu.

Note: The RSS link is not available if the portal moderator has not enabled RSS in the portal.

For example, in the Firefox browser, the copy-link command is **Copy Link Location**. In the Internet Explorer browser, the copy-link command is **Copy Shortcut**.

Figure 27–22 RSS Icon in the Announcements View



Alternatively, if you drag the news feed icon onto your reader you can omit most of the other steps. You may require to enter your WebCenter Portal credentials. See [Section 27.1, "About RSS"](#) for more information.

3. Go to your RSS reader and initiate an add-subscription action.
How you do this depends on the RSS reader you use.
4. Paste the link you copied in step 2 into the relevant field in your preferred RSS reader.

Note: The news feed URL in the Announcements view is for RSS 2.0 news readers only. If you prefer to use an Atom 1.0 news reader, do either of the following:

- Append `&format=ATOM1.0` to the RSS news feed URL you pasted.
- Get the Atom 1.0 URL from the RSS Manager and use that URL here. See [Section 27.2.4.1, "Obtaining an Announcements News Feed from the RSS Manager"](#) for more information.

You may need to enter your WebCenter Portal credentials. See [Section 27.1, "About RSS"](#) for more information.

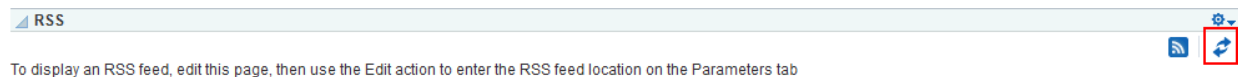
27.3 Refreshing RSS

The RSS component, along with other page components, gets refreshed with every server request. However, as the content from news feeds may be dynamic, you have the option of refreshing RSS yourself by clicking the **Refresh** icon ([Figure 27–23](#)), when required.

To see the latest RSS feeds, click the **Refresh** icon ([Figure 27–23](#)).

Note: Do not click the Reload or Refresh button in your browser. Click the **Refresh** icon to update your view.

Figure 27–23 Refresh Icon on an RSS View



The view updates and displays latest data from the external source.

27.4 Removing RSS Feeds

If the Remove icon is available, you can delete the RSS component from a page by using the **Remove** icon ([Figure 27–24](#)). Portal moderators can specify the remove setting for the RSS view. See the "Deleting the RSS Task Flow" section in *Building Portals with Oracle WebCenter Portal*.

Figure 27–24 Remove Icon on an RSS View



When you click the **Remove** icon, the Delete Component dialog opens. Click **Delete** in this dialog to delete the RSS component from the page.

Exploring Your Worklists

This chapter describes the features offered through worklists. 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 displayed on a page in a portal or the Home portal, where you can view and act on all items in one place.

This chapter includes the following topics:

- [Section 28.1, "About Worklists"](#)
- [Section 28.2, "Working with Worklists"](#)

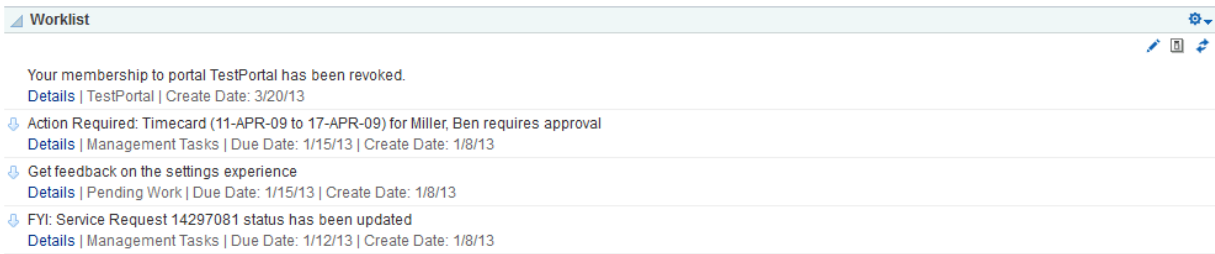
Permissions: This chapter is intended for WebCenter Portal users interested in understanding and using worklist features to track their tasks, notifications, and alerts. The tasks described in this chapter are available to any WebCenter Portal user with access to a page that contains a worklist.

Note: Tasks discussed in this chapter are not available if the worklists viewer is not exposed on a page. The portal moderator adds and configures worklists, as described in the "Adding Worklists to a Portal" section in *Building Portals with Oracle WebCenter Portal*.

28.1 About Worklists

Worklists is one of the ways you can access tasks, notifications, and alerts that require your attention. 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.

You can view and respond to all worklist items allocated to you ([Figure 28-1](#)).

Figure 28–1 A Sample Worklist

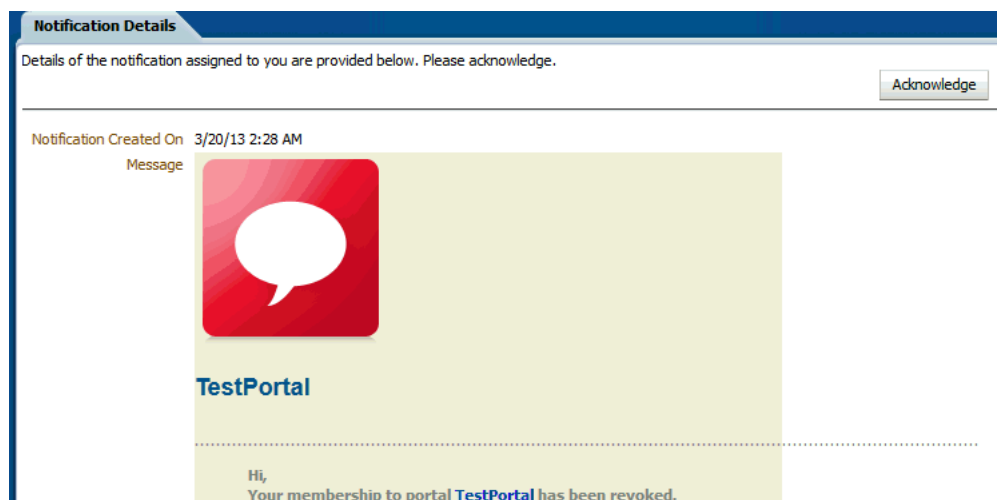
If the worklist feature is configured in WebCenter Portal, then your portal moderator must add a worklist to a portal page or Home portal for you to see your portal membership notifications, invitations to join new portals, and so on. For more information, see the "Adding Worklists to a Portal" chapter in *Building Portals with Oracle WebCenter Portal*. If the Oracle BPM Worklist has been configured with the User Messaging Service's email driver to send notifications associated with BPM Workflows, then you may receive email notifications that you can act on.

You can view and respond to messages, alerts, and notifications from the automated processes in place in your organization. For more information, see [Section 28.2.1, "Viewing and Responding to Worklist Items."](#)

In WebCenter Portal, for example, one worklist item might be a request for portal membership. If you are selected as an approver for portal membership, a workflow item will be assigned to you and will appear on your worklist each time a user applies to become a member, which you can then accept or reject. This is just one example of the types of notifications and requests that can be posted on your worklist.

Another worklist item might be a notice of acceptance as a member of a portal. Response to such a notification would be to acknowledge that you have received it. These are two minor examples of a much wider range of possible messages, alerts, notifications, and responses.

[Figure 28–2](#) shows an example of a worklist notification that is to be acknowledged.

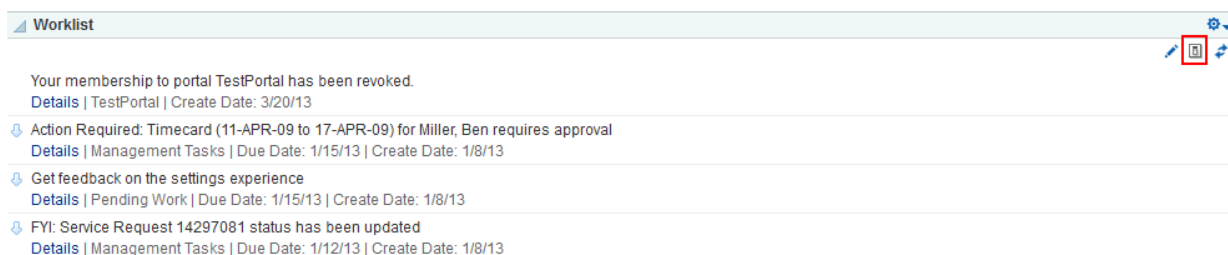
Figure 28–2 Worklist Notification

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. If the

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 includes a control for accessing messaging preferences on this server. Click the **Messaging preferences** icon (Figure 28–3) 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.

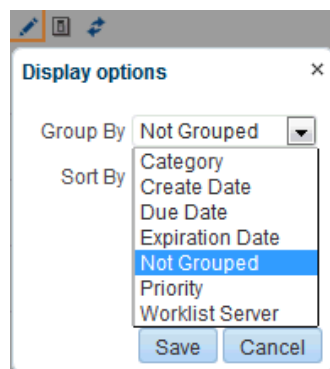
Figure 28–3 Worklist Messaging Preferences Icon



For information about setting messaging preferences for the User Messaging Service through WebCenter Portal, see the "Setting Messaging Preferences" section in *Building Portals with Oracle WebCenter Portal*.

To assist you in maintaining an organized view of your worklist items, the worklist provides a variety of display options, accessible from the worklist toolbar (Figure 28–4).

Figure 28–4 Worklist Display Options



Worklist display options enable you to approach responding to messages, alerts, and notifications according to timeliness and relevance.

See [Section 28.2.2, "Arranging Your Display of Worklist Items"](#) for more information about worklist display options.

28.2 Working with Worklists

Worklists provide a fast and convenient way to read and respond to items that you need to act upon from the automated processes in place in your organization. All of the information on the worklist is specifically relevant to you.

This section provides information about using worklists. This section includes the following topics:

- [Section 28.2.1, "Viewing and Responding to Worklist Items"](#)
- [Section 28.2.2, "Arranging Your Display of Worklist Items"](#)
- [Section 28.2.3, "Refreshing Worklists"](#)

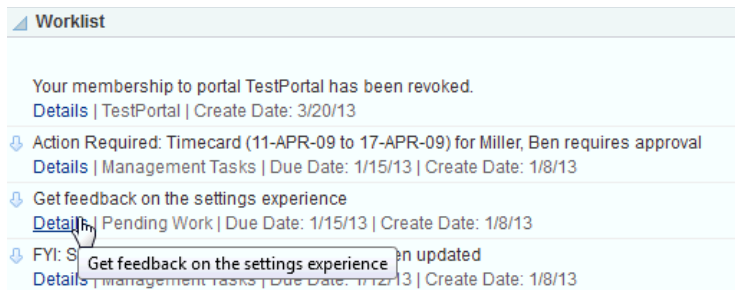
For information about setting messaging preferences for the User Messaging Service through WebCenter Portal, see the "Setting Messaging Preferences" section in *Building Portals with Oracle WebCenter Portal*.

28.2.1 Viewing and Responding to Worklist Items

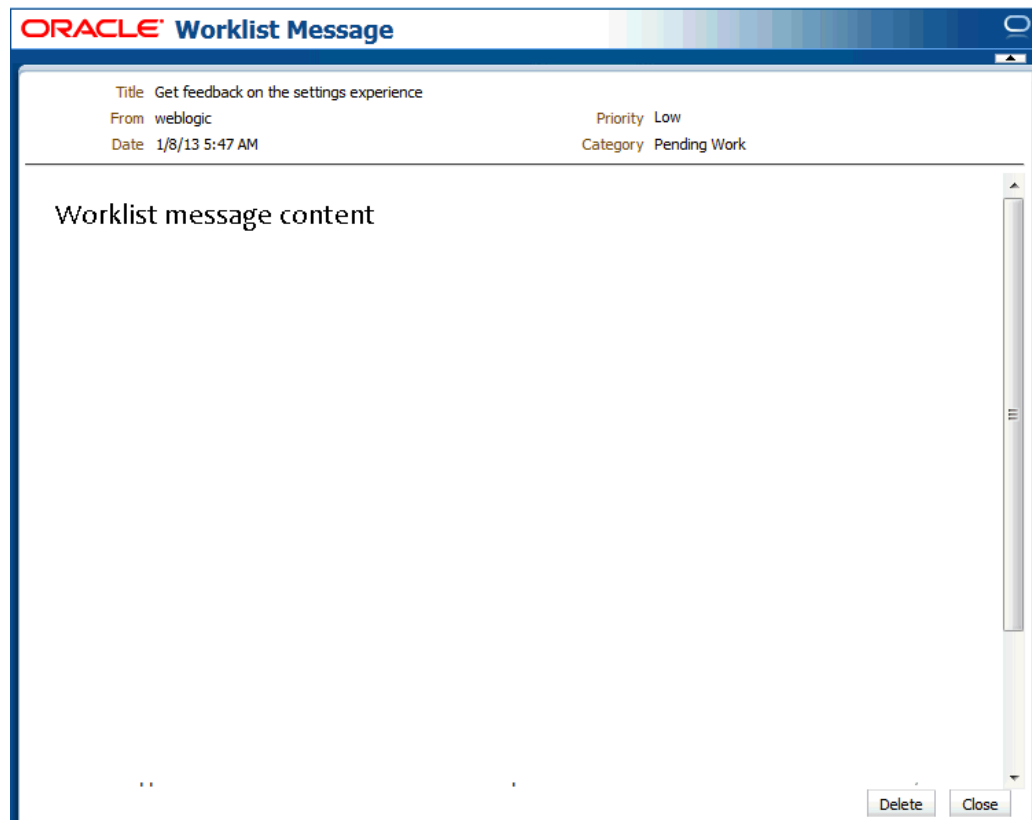
To view a task, message, alert, or notification:

1. From a worklist, click the **Details** link ([Figure 28–5](#)) of the worklist item you want to view.

Figure 28–5 Worklist Details Link



2. If not already logged in, log in to Oracle User Messaging Preferences.
3. View the details of the worklist item ([Figure 28–6](#)).

Figure 28–6 Sample Worklist Message Window

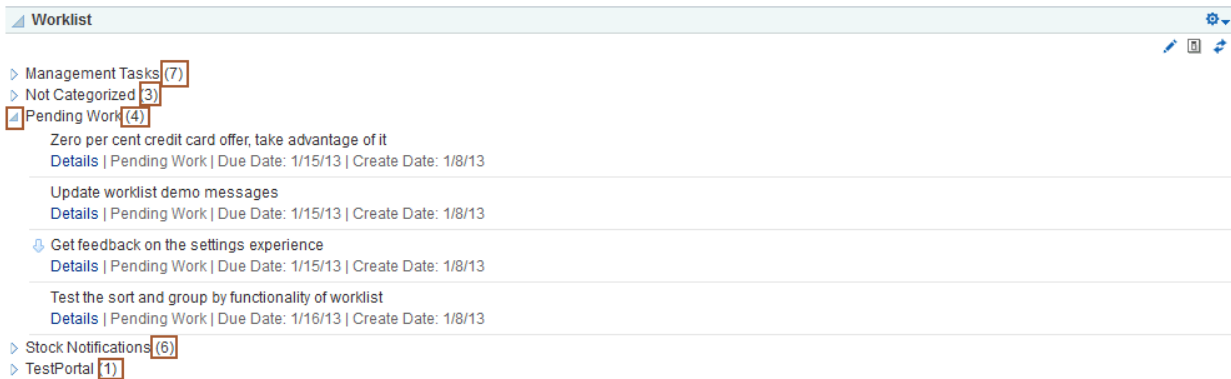
4. Respond to the worklist item accordingly or click **Close**.

You might have the option to delete or acknowledge an item, depending on the type of notification. Any worklist item that is no longer of the `Assigned` state is removed from the worklist during the next refresh.

28.2.2 Arranging Your Display of Worklist Items

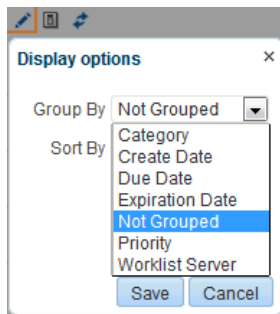
This section describes how to use worklist sorting and grouping options to arrange your display of the worklist. Sorting affects the display order of worklist items. Grouping divides items into groups that share a common attribute, such as a common category, a shared priority level, or some other common attribute.

A number next to each group (Figure 28–7), which indicates the number of items contained in a particular group. To expand a group and see the items it contains, click the **Expand** icon to the left of the group title.

Figure 28–7 Numbers Next to Worklist Groups

To arrange your display of worklist items:

1. Go to a worklist.
2. Click the **Display Options** icon at the top of the worklist (Figure 28–4).
3. In the Display Options dialog box, expand the **Group By** drop-down list (Figure 28–8), and select an option for grouping your worklist items.



Figure 28–8 Worklist Group By List

Select from the following options:

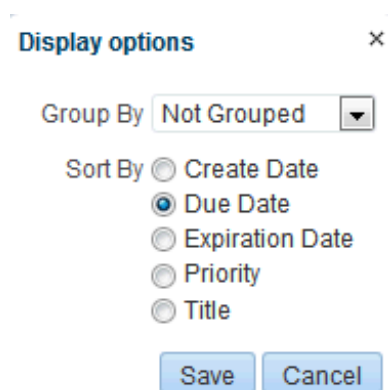
- **Category**—Group worklist items into their assigned categories. Items that do not belong to a category are grouped under the heading **Not Categorized**. Whether a worklist item includes a category is determined by the workflow developer; consequently, not all items include categories.
- **Create Date**—Group worklist items according to the date they were created, starting with the most recent.
- **Due Date**—Group worklist items according to when they are due. Due dates are optional; therefore, some items may not have them. In such cases, the date the item was created is used.
- **Expiration Date**—Group worklist items according to when they are due to expire. Expiration dates are optional; therefore, some items may not have them. In such cases, the date the item was created is used.
- **Not Grouped**—Do not group worklist items. When you group worklist items by **Not Grouped**, the worklist displays items in a flat list. All other grouping options display the items in a tree format.

- **Priority**—Group worklist items according to priority, either high, normal, or low. [Table 28–1](#) illustrates the priority indicators that are used in worklists.

Table 28–1 Worklist Priority Indicators

High	Normal	Low
	No indicator	

- **Worklist Server**—Group worklist items, according to the server from which they originated.
4. Select a **Sort By** option ([Figure 28–9](#)).

Figure 28–9 Sort By Options in the Display Options Dialog

Select from the following options:

- **Create Date**—Sort worklist items according to the date they were created, starting with the most recent.
 - **Due Date**—Sort worklist items according to when they are due. Due dates are optional; therefore, some items may not have them. In such cases, the date the item was created is used.
 - **Expiration Date**—Sort worklist items from the most recent expiration to the furthest away. Expiration dates are optional; therefore, some items may not have them. In such cases, the date the item was created is used.
 - **Priority**—Sort worklist items from highest to lowest priority (see [Table 28–1](#) for illustrations of priority indicators).
 - **Title**—Sort worklist items first from 0 to 9 then from a to z.
5. Click **Save** to save your changes and close the Display Options dialog box.

The worklist displays the newest created 25 items for each worklist server connection. For items exceeding the 25-item limit, follow the link, from where you can view and act on a larger volume of worklist items.

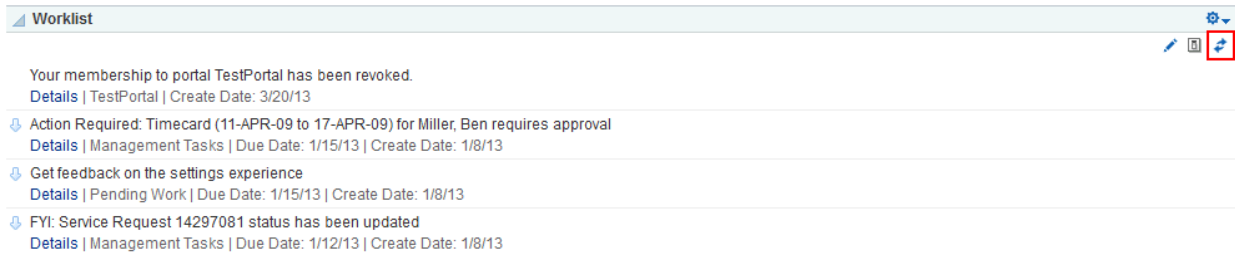
28.2.3 Refreshing Worklists

Every 15 minutes, the worklist refreshes automatically with new messages, alerts, and notifications. Optionally, you can update your view yourself by clicking the **Refresh Worklist** icon ([Figure 28–10](#)).

Note: A worklist does not get refreshed automatically when you perform an action on any task. You must refresh the worklist to list the latest items.

Do not click the Reload or Refresh button in your browser. Click the **Refresh** icon to update your view.

Figure 28–10 Refresh Worklist Icon



Roll your mouse pointer over the **Refresh Worklist** icon to display the date and time the worklist was last refreshed.

Part VI

Staying Organized

Part VI contains the following chapters:

- [Chapter 29, "Working with Calendars and Events"](#)
- [Chapter 30, "Managing Your Notes"](#)
- [Chapter 31, "Working with Lists"](#)
- [Chapter 32, "Linking Information in WebCenter Portal"](#)
- [Chapter 33, "Working with Tags"](#)

Working with Calendars and Events

This chapter describes the features offered through events. Events provides calendars that you can use to schedule meetings, appointments, and any other types of occasions. Events also let you to view your own personal Microsoft Exchange calendar within the Home portal. Overlaying portal calendars on top of the Home portal calendar, allows you to view your entire schedule in a single place.

This chapter includes the following topics:

- [Section 29.1, "About Events"](#)
- [Section 29.2, "Working with Events"](#)

Permissions: This chapter is intended for WebCenter Portal users who want to use the calendar and events feature to schedule and track events. The permissions to do the tasks in this chapter are granted by default to the portal Participant role. However, you might not be able to do some tasks if *one* or more of the following advanced permissions for events have been set:

- Create, Edit, and Delete Events
- View Events

Note: Tasks discussed in this chapter are not available if events are not enabled and exposed. The portal moderator adds and configures events, as described in the "Adding a Calendar and Events to a Portal" section in *Building Portals with Oracle WebCenter Portal*.

29.1 About Events

Events include appointments, meetings, presentations, and so on. Within WebCenter Portal, there are two kinds of events:

- **Personal events** are those that are not related to a specific portal. They could include personal appointments with a doctor or dentist, or lunch with a friend.

Personal events come from your Microsoft Exchange calendar and display only to you in the Events viewer on a page in the Home portal. See [Section 29.1.2, "Where to View Events"](#) for viewing events in your personal calendar.

- **Portal events** are those that are related to a specific portal. They could include weekly meetings, presentations, or a customer visit.

Portal events display to all members of the portal on the portal's dedicated **Events** page (or console) or in any Events viewer that is located on a page in the portal. Members with the required level of permission can schedule or update events.

Note: If your application uses WebCenter Portal's default user roles, then the required permissions to create an event are included in both the *participant* and *moderator* roles. *Participants* and *Moderators* can manage all events.

29.1.1 Calendar Overlaying

In addition to viewing your personal events in your Home portal, you can also view portal events from selected portals all together in one place. This is referred to as *calendar overlaying*. In this way, you can have all your important events available in one location, your Home portal, rather than having to go to multiple portals to manage your daily schedule.

In a portal, if an Events page (or console) has been added, you can also add events to it. However, you can view personal events only in your Home portal.

See [Section 29.1.2, "Where to View Events"](#) for more information about viewing events with or without calendar overlaying.

Note: Calendar overlaying must be enabled by your application specialist or portal moderator and set to a value other than *None*, if you want to view your personal events from your Microsoft Exchange calendar. See the "Enabling Calendar Overlaying" section in *Building Portals with Oracle WebCenter Portal* for more information.

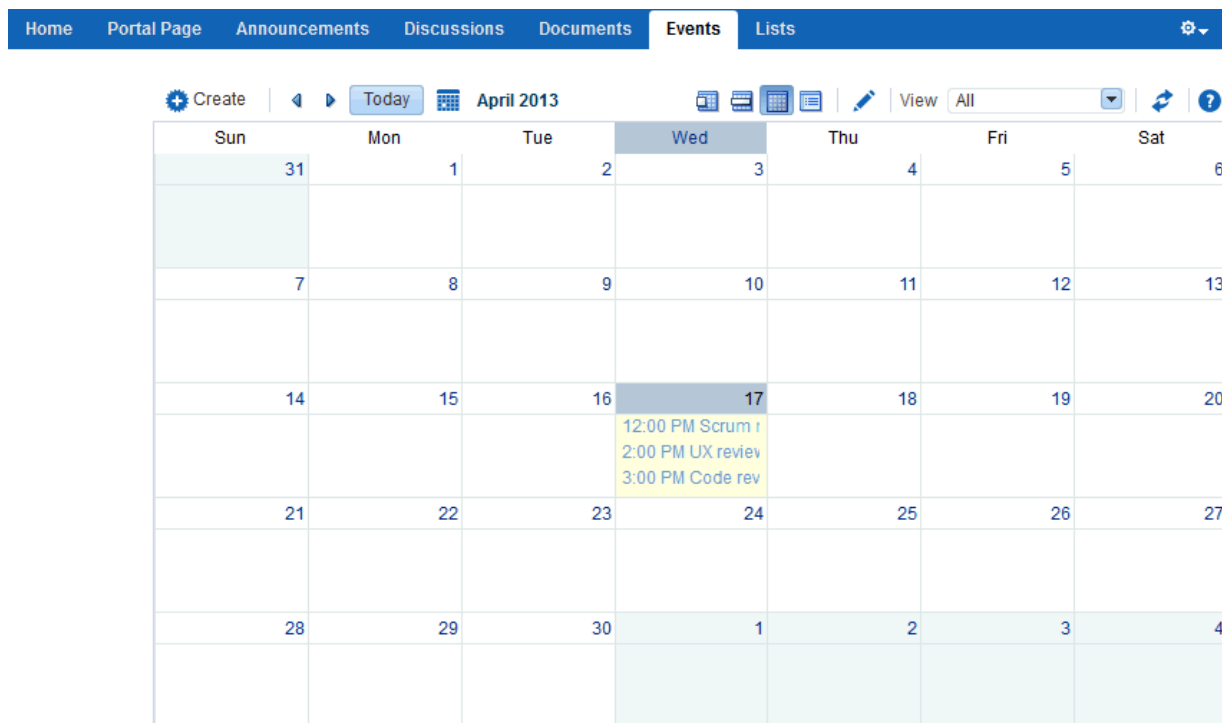
29.1.2 Where to View Events

Your portal may provide a variety of locations from which to view events.

See Also: [Section 29.2.2, "Viewing Events"](#) and [Section 29.2.6, "Displaying Multiple Calendars Together"](#).

- Every portal in which events is enabled or included in the portal template includes an **Events** page (or console) that can be displayed or hidden. If you cannot see the **Events** page, it could be hidden. The application specialist or portal moderator has to provide a link to the Events viewer or expose the Events page from where you can access events. [Figure 29-1](#) shows portal events on the Events page or console.

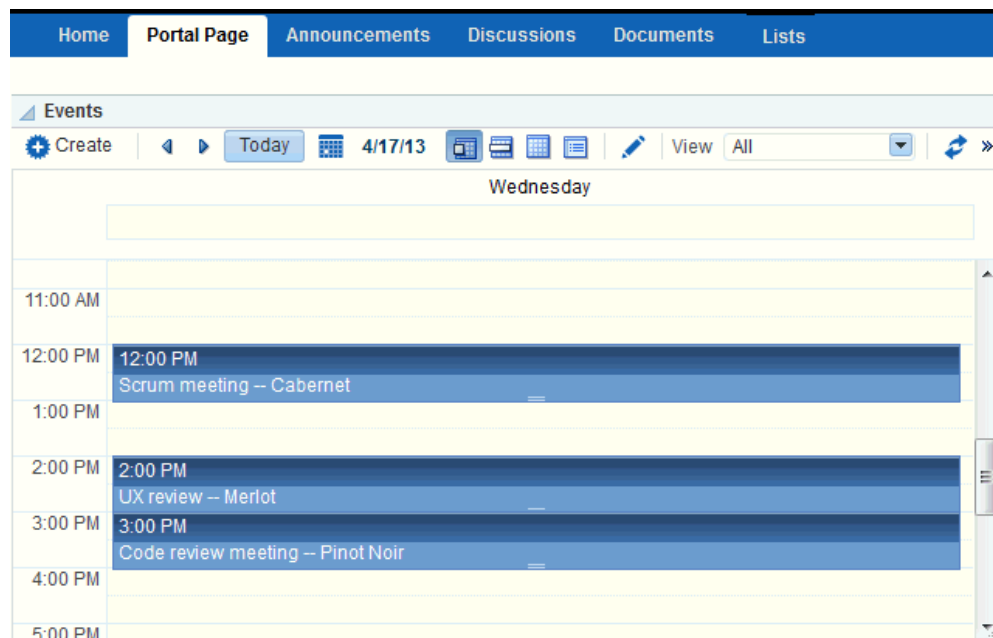
Figure 29–1 Events on the Events Page



- If your portal moderator has added the Events viewer to a page in a portal, you can view it from the portal navigation. Figure 29–2 shows events on another page in the portal.

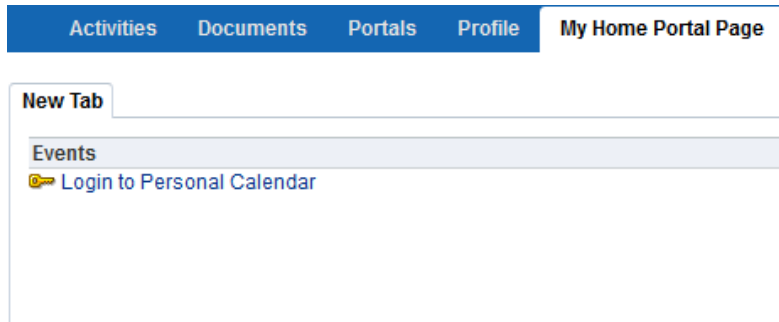
Note: You can only view personal events in the Home portal.

Figure 29–2 Events on a Portal Page



- Your portal moderator can also add events to a page in the Home portal, make that page visible, and give participants access to that page. In the Home portal, the Events viewer does not initially display the calendar of events from your personal calendar. You need to click **Login to Personal Calendar**. Figure 29–3 shows the events view on a page in the Home portal *without* calendar overlaying.

Figure 29–3 Events Viewer in Home Portal Before Logging In (Without Calendar Overlaying)

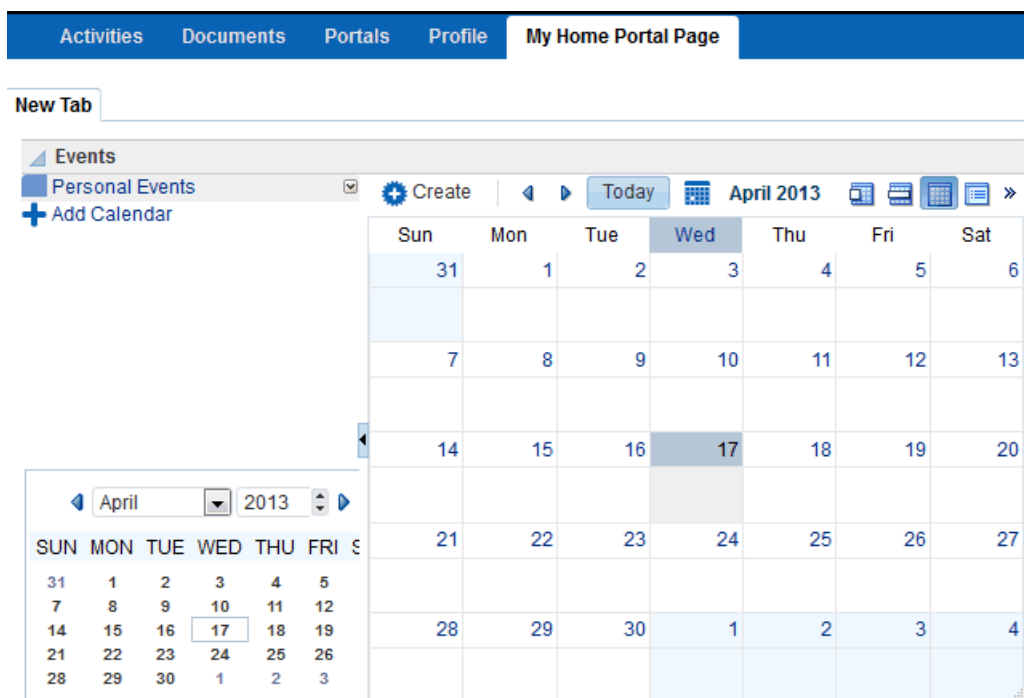


See Also: For information about logging in to your Microsoft Exchange calendar, see [Section 29.2.1, "Accessing Your Personal Events."](#)

If you do not have a Microsoft Exchange calendar, or do not want to display personal events, but still want to view portal events in the Home portal, ask your portal moderator to enable calendar overlaying. You can still see your portal events, as shown in Figure 29–4.

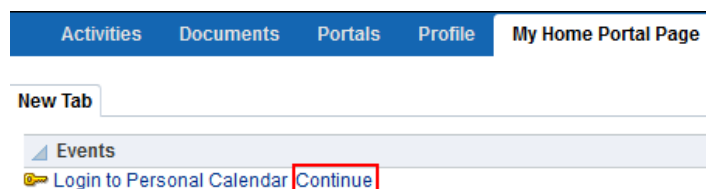
Figure 29–4 shows events in the Home portal *with* calendar overlaying.

Figure 29–4 Events Viewer in Home Portal Before Logging In (With Calendar Overlaying)



If calendar overlaying is enabled, then click **Personal Events** (Figure 29–4) to see **Login to Personal Calendar** and then click **Continue** (Figure 29–5).

Figure 29–5 Events in Home Portal with Calendar Overlay Enabled



Note: Calendar overlaying must be enabled by your portal moderator and set to a value other than `None`, if you want to view your personal events from your Microsoft Exchange calendar. See the "Enabling Calendar Overlaying" section in *Building Portals with Oracle WebCenter Portal* for more information.

29.1.3 Integration with Other Features

Through its tight integration with links, the events feature provides the opportunity to associate events with other WebCenter Portal assets. Linking enables you to associate documents, notes, announcements, discussions, and URLs with an event. You can create links from an event by editing the event and clicking the **Links** icon. For more information, see [Section 32.2, "Working with Links Features."](#)

Events also enables you to send mail messages about portal events to members of the portal. You can send mail from an event by editing the event and clicking the **Send Mail** icon. See [Section 13.1, "About the Send Mail Feature"](#) for information about working with the Mail feature.

29.2 Working with Events

Events include appointments, meetings, presentations, and so on. WebCenter Portal provides two kinds of event views for displaying personal and portal events:

- The **Events** view provides a fully featured calendar where as well as viewing events in a variety of layouts, you can also create and manage events and display events from multiple calendars.
- The **Events - Mini View** provides a more compact view of events as a list. You can view upcoming events and edit existing events. You cannot create new events in this view. This is useful if you want to provide information about events, but do not have enough space on the page for a full calendar.

Note: The steps in the following sections apply to both personal events and portal events. Where there are any differences, these are noted.

This section includes the following topics:

- [Section 29.2.1, "Accessing Your Personal Events"](#)
- [Section 29.2.2, "Viewing Events"](#)

- [Section 29.2.3, "Scheduling Events"](#)
- [Section 29.2.4, "Revising Scheduled Events"](#)
- [Section 29.2.5, "Cancelling Scheduled Events"](#)
- [Section 29.2.6, "Displaying Multiple Calendars Together"](#)
- [Section 29.2.7, "Subscribing to Events"](#)

29.2.1 Accessing Your Personal Events

You can maintain a calendar of personal events outside of WebCenter Portal that does not relate to specific portals. If you use Microsoft Exchange 2003 or 2007 for this calendar, you can include your personal events in the Home portal. This keeps all your calendar information in a single place, making it much easier for you to organize your day.

You can view personal events in the Home portal. You can also edit or delete personal events or create new personal events that are pushed to your Exchange calendar.

Note: Your portal moderator can set up a page to view events in the Home portal, from where you can view your personal events. See the "Showing Events on a Page in the Home Portal" section in *Building Portals with Oracle WebCenter Portal*.

When setting up the Events view, your portal moderator can also enable calendar overlaying to display portal events alongside personal events in the Home portal. You can view your personal calendar events alongside portal events, but you cannot push portal events into your Exchange calendar. See [Section 29.1.1, "Calendar Overlaying"](#) for more information about calendar overlaying.

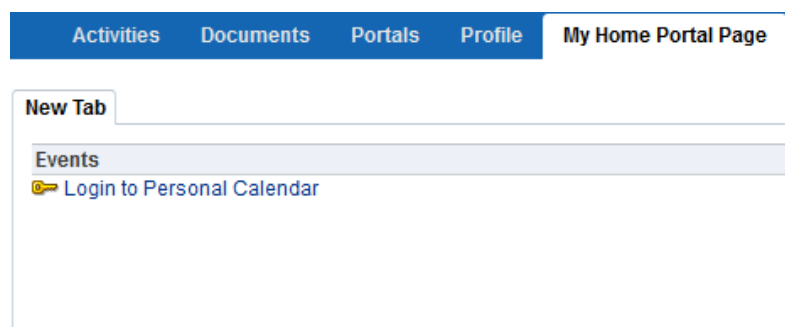
To access your personal events:

1. Navigate to the Home portal of the portal, and then to the page which contains your personal events (see [Figure 29–3](#)).
2. Click **Login to Personal Calendar** ([Figure 29–6](#)).

In the Home portal, the Events view does not initially display the calendar of events from your personal calendar. Instead it displays a link prompting you to **Login to Personal Calendar** ([Figure 29–6](#)).

Note: If you see the link **Try Again** instead of **Login to Personal Calendar**, there is a problem with the connection to the Microsoft Exchange Server. Contact your system administrator.

Figure 29–6 Events View in Home Portal Before Logging In (Without Calendar Overlaying)



If you do not have a Microsoft Exchange calendar, or do not want to display personal events, but still want to view portal events in the Home portal, your portal moderator can enable calendar overlaying (see [Section 29.1.1, "Calendar Overlaying"](#)). Click **Personal Events** (Figure 29–7) and then click **Continue** (Figure 29–8).

Figure 29–7 Personal Events Link on a Page in the Home Portal

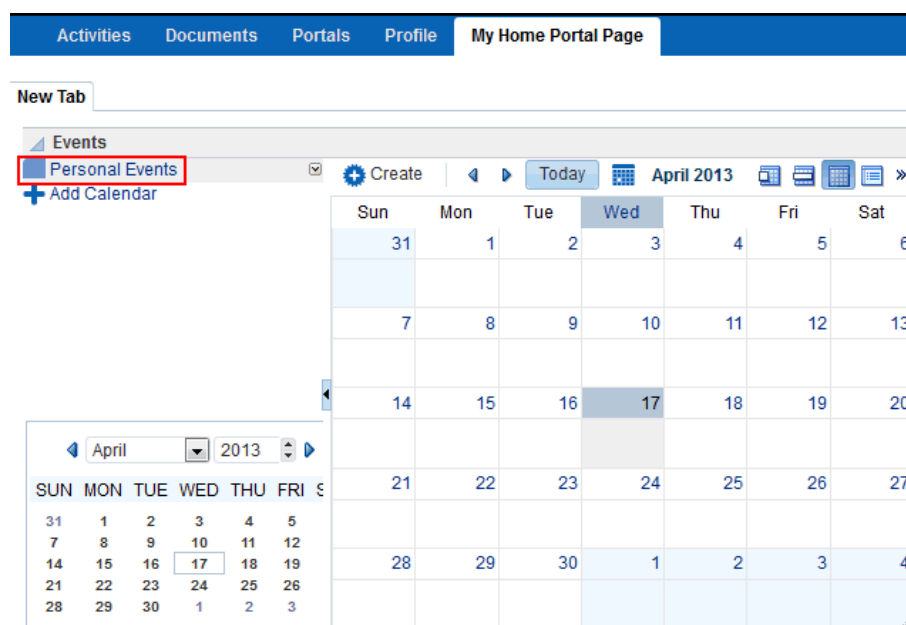
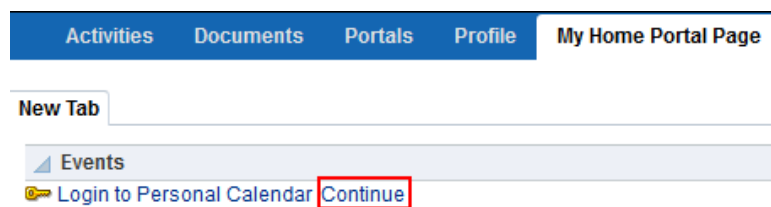


Figure 29–8 Events View on a Page in the Home Portal (With Calendar Overlay Enabled)

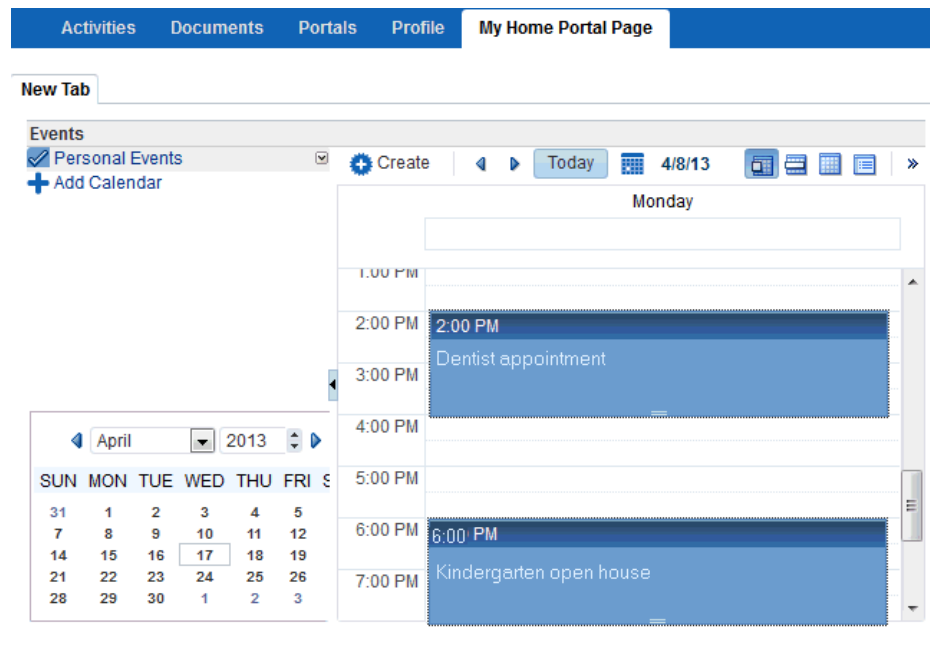


3. In the **External Application Login** dialog that appears, enter your Microsoft Exchange login credentials and click **OK**.

Note: The **External Application Login** dialog may include additional fields and information, depending on the requirements of the mail service that provides it. For more information about external applications and storing your login credentials in WebCenter Portal, see [Section 5.7, "Providing Login Information for External Applications."](#)

Your personal calendar is displayed ([Figure 29–9](#)).

Figure 29–9 Personal Calendar



29.2.2 Viewing Events

You can view events as a grid or a list; choose to display events by day, week, or a month; filter events by category; select the range of hours displayed per day; and include a second time zone in the display.

See Also: [Section 29.1.2, "Where to View Events"](#) for information on viewing the events on the Events page, on a page in the portal, and on a page in the Home portal.

This section includes the following subsections:

- [Section 29.2.2.1, "Using the Calendar Interface"](#)
- [Section 29.2.2.2, "Viewing Event Details"](#)
- [Section 29.2.2.3, "Filtering Events by Category"](#)
- [Section 29.2.2.4, "Setting Display Preferences"](#)

29.2.2.1 Using the Calendar Interface

You can use icons to display events in grid form or as a list. When you display events as a grid, you can show them by day, week, or month. When you display events as a list, the number of upcoming events listed depends on the display options selected.

See Also: See [Section 29.2.2.4, "Setting Display Preferences"](#) for information about changing List view display options.

Usually, in grid mode, events are displayed for the current day, week, or month. To view events for a specific point in time, you can use the previous or next icons or select a date so that the calendar displays events for a specific date.

[Table 29-1](#) lists the different icons available and describes their function.

Note: The following options are not available in the Events - Mini View.

Table 29-1 Calendar Icons






Icon	Description
	Click to display events from the previous day, week, or month.
	Click to display events from the next day, week, month.
	Click to display events for the current date (today).
	Click to display events for a specific date. Note: If the calendar overlay feature is enabled in Full mode then the Date Picker is always visible to the left of the calendar.
	Click to display events one day at a time.
	Click to display events for the whole week.
	Click to display events for the whole month.
	Click to display a list of upcoming events. The number of events listed depends on the settings (for more information, see Section 29.2.2.4, "Setting Display Preferences").
	Click to display the Event Preferences dialog to specify calendar times, secondary time zones, and configure the list view (for more information, see Section 29.2.2.4, "Setting Display Preferences").
	Select one or more event categories by which to filter the events in the calendar. Only events belonging to the selected categories are displayed in the calendar (for more information, see Section 29.2.2.3, "Filtering Events by Category").

Table 29–1 (Cont.) Calendar Icons

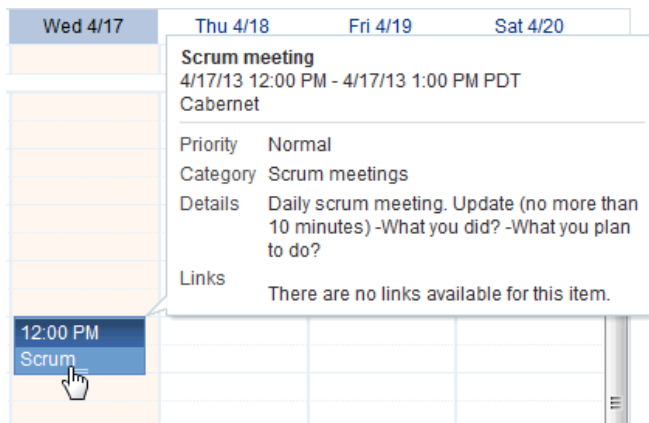
Icon	Description
	Click to refresh the page with any recent changes.

29.2.2.2 Viewing Event Details

The **Events** page (or console) or Events view displays basic information about events. To view more information, such as the location, start and end times, priority, category, or links, simply hover your mouse over an event.

The resulting window ([Figure 29–10](#)), displays the following information:

- The title of the event
- Details of the date and time of the event, including the secondary time zone if one has been specified
- The priority of the event
- The category to which the event belongs
- The location of the event, if specified
- Any links associated with the event

Figure 29–10 An Event Showing Details

To view any specific details of the event, you must edit the event. See [Section 29.2.4, "Revising Scheduled Events"](#) for more information.

29.2.2.3 Filtering Events by Category

You can filter the events displayed in the calendar to show only those that belong to one or more particular categories, for example Team Meeting, Customer Meeting, Vacation, and so on.

See Also: Event categories are created by the portal moderator in the portal administration settings. After they are created, you can use them to assign categories to your events, which enables you to then filter events by category. If your portal moderator did not create categories, you will not be able to categorize events. See the "Creating and Managing Portal Event Categories" section in *Building Portals with Oracle WebCenter Portal*.

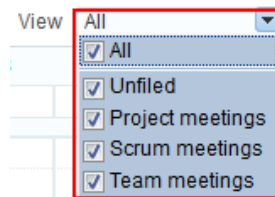
To filter events by category:

1. Go to the Events view or **Events** page where you want to filter events.

Note: You cannot filter events in the Events - Mini View. The **View** drop-down list is available only for portal events, not personal events.

2. In the toolbar, from the **View** drop-down list (Figure 29–11), select one or more categories by which you want to filter the events displayed in the calendar.

Figure 29–11 View List for Filtering by Event Category



When you close the drop-down list, only those events that belong to the selected category or categories are displayed in the calendar.

Tip: To remove event filtering, deselect any of the categories in the **View** drop-down list.

29.2.2.4 Setting Display Preferences

Events display preferences allows you to do the following:

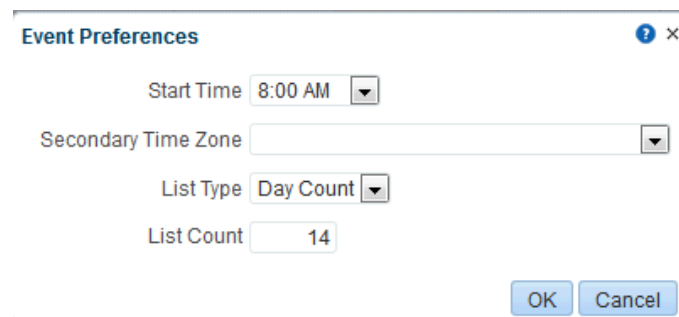
- Determine the earliest time displayed on the calendar when events are viewed by day or week.
- Identify a secondary time zone.
- Specify how to display events in List view: by day, week, month, or for a specified number of days.

To set these preferences, click the **Set Event Preferences** icon (Figure 29–12) to access the Event Preferences dialog (Figure 29–13).

Figure 29–12 Set Event Preferences Icon



Figure 29–13 Event Preferences Dialog



Note: The **Set Event Preferences** icon, and therefore the Event Preferences dialog, is not available in the Events - Mini View viewer.

This section includes the following topics:

- [Section 29.2.2.4.1, "Setting the Calendar Start Time"](#)
- [Section 29.2.2.4.2, "Setting a Secondary Time Zone"](#)
- [Section 29.2.2.4.3, "Configuring List View"](#)

29.2.2.4.1 Setting the Calendar Start Time In Day and Week view, the calendar grid is divided into hours. If vertical space for your calendar is limited, you can specify the earliest hour to display on the calendar grid to save space. If the space available has enough room to display hours from before the specified start time until 11PM, it does so.

To set the calendar start time:

1. Go to the Events view or **Events** page where you want to set the calendar start time.
2. Click the **Set Event Preferences** icon on the toolbar ([Figure 29–12](#)).
3. In the Event Preferences dialog ([Figure 29–13](#)), from the **Start Time** drop-down list, select the earliest hour to display on the grid.

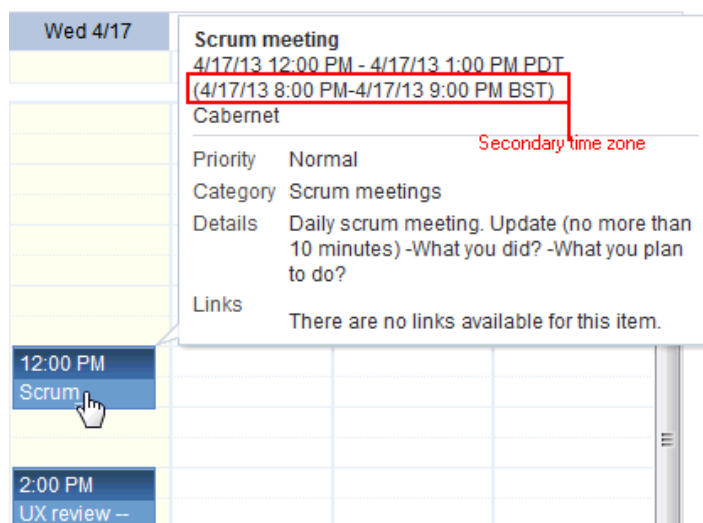
Choose from 12AM to 11PM.

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

29.2.2.4.2 Setting a Secondary Time Zone These days, it is not unusual to be working in teams with members in different locations. When scheduling meetings, it is useful to know the hours most optimal to all invitees. To make this easier, you can specify a secondary time zone to see what time a meeting is in that time zone as well as your own.

When you hover your mouse over an event, the event details window shows the time of the meeting in your time zone and in the secondary time zone ([Figure 29–14](#)).

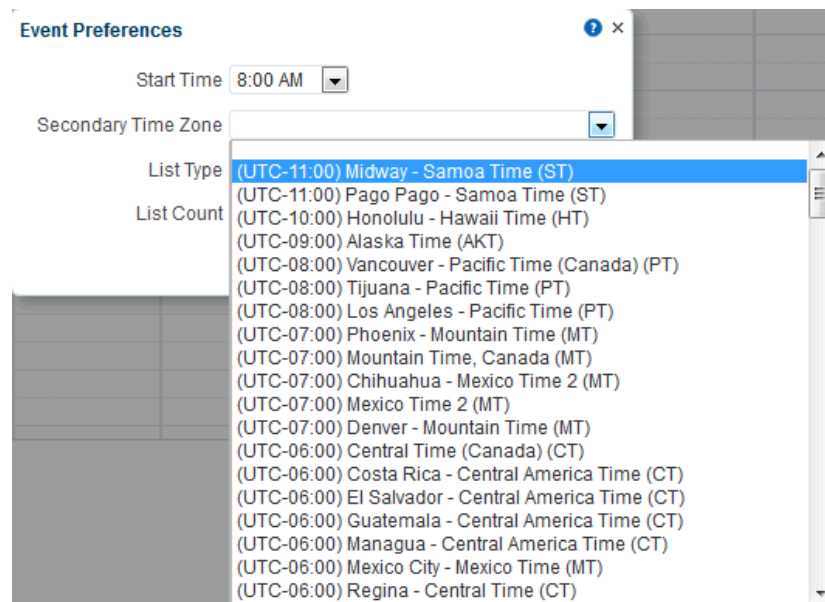
Figure 29–14 Event Details Window Displaying Primary and Secondary Time Zones



To set a secondary time zone:

1. Go to the Events view or **Events** page where you want to set a secondary time zone.
2. Click the **Set Event Preferences** icon on the toolbar (Figure 29–12).
3. In the Event Preferences dialog (Figure 29–15), from the **Secondary Time Zone** drop-down list, select a secondary time zone to display along with the primary time zone.

Figure 29–15 Event Preferences Dialog Showing Secondary Time Zones



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

29.2.2.4.3 Configuring List View You can specify how you want to display events, when the calendar is displayed in List view. You can display events by day, week, month, or for a specified number of days.

To configure List view:

1. Go to the Events view or **Events** page where you want to configure List view.
2. Click the **Set Event Preferences** icon on the toolbar (Figure 29–12).
3. In the Event Preferences dialog (Figure 29–16), from the **List Type** drop-down list, select how you want to display events in List view:

Figure 29–16 Event Preferences Dialog Showing List Types

- **Day Count**—List all upcoming events for a specified number of days.
 - **Day**—List all upcoming events for the currently selected day.
 - **Week**—List all upcoming events for the currently selected week.
 - **Month**—List all upcoming events for the currently selected month.
4. If you selected **Day Count** in the previous step, in the **List Count** field, specify the number of days for which you want to display events. The default is 14.
 5. Click **OK** to save your changes.

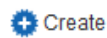
29.2.3 Scheduling Events

You can schedule portal events and personal events. When you schedule a personal event, the details are pushed to your Microsoft Exchange calendar.

Note: You cannot schedule new events in the Events - Mini View.

To schedule an event:

1. Go to the Events view or **Events** page where you want to schedule the event.
2. Click **Create** on the toolbar (Figure 29–17).

Figure 29–17 Create a New Event Icon

The Create Event dialog opens (see Figure 29–18 and Figure 29–19). The fields in the Create Event dialog are slightly different depending on whether you are creating a personal event or a portal event. These differences are pointed out later in this procedure.

Note: You can also easily invoke the Create Event dialog in grid view by double-clicking an empty space or right-clicking an empty space and selecting **Create**. The advantage of this is that the date and time of the event are automatically specified in the dialog.

Figure 29–18 shows the Create Event dialog invoked from the Events page.

Figure 29–18 Create Event Dialog Invoked From the Events Page

Create Event ? ×

* Title

Location

Time

All Day Event

* Start Time

* End Time

Options

Priority

Category

Details

Figure 29–19 shows the Create Event dialog invoked from the a page in the Home portal.

Figure 29–19 Create Event Dialog Invoked From a Home Portal Page

Create Event ? ×

* Title

Location

Calendar

Time

All Day Event

* Start Time

* End Time

Options

Priority

Details

Private

3. In the **Title** field, enter a brief descriptive title for the event.

For example, Project Update.

4. In the **Location** field, enter the location of the event.

For example, Conference Room 5.

5. From the **Calendar** drop-down list, select the calendar in which you want to create the event.

Note: The **Calendar** drop-down list is available only when the calendar overlay feature is enabled and at least one other calendar is displayed.

The **Calendar** drop-down list is not available for events created from the **Events** page (where calendar overlaying is not available).

See [Section 29.1.1, "Calendar Overlaying"](#) for more information.

6. Select **All Day Event** to block out the entire day for the event.

All day events can span multiple days. In Day and Week view mode, all day events are displayed in a separate area at the top of the calendar. In Month view, all day events are displayed surrounded by a block of color.

7. In the **Start Time** field enter a date and time to start the event.

Tip: You can click the **Select Date and Time** icon and select a start time from the Date and Time Picker, if you prefer.

For all day events, you specify the date only.

8. In the **End Time** field enter a date and time to finish the event.

Tip: You can click the **Select Date and Time** icon and select an end time from the Date and Time Picker, if you prefer.

For all day events, you specify the date only.

9. (Optional) From the **Priority** drop-down list, select a priority for the event: **Highest, High, Normal, Low, or Lowest**.

The priority of an event determines where it appears when events conflict. An event with Highest priority is displayed first. The event priority is also displayed in the event popup window when a user hovers the mouse over the event.

10. (Optional) If your portal moderator set up event categories, from the **Category** drop-down list, you can select a category to classify this event.

Categories are useful for creating distinct groups of events, organized according to their general purpose. See the "Creating and Managing Portal Event Categories" section in *Building Portals with Oracle WebCenter Portal*.

The event category is displayed in the event popup window when a user hovers the mouse over the event. Events in different categories can be displayed in different colors if the portal moderator used colors to specify categories.

You can also filter a calendar to display events belonging to a specific category.

See Also: [Section 29.2.2.3, "Filtering Events by Category"](#)

Note: The **Category** drop-down list is available only for portal events.

11. (Optional) In the **Details** field, enter any additional details you want to include, up to a maximum of 4000 characters.

For example, you might want to describe the purpose of the meeting, provide a brief agenda, or indicate if attendees need to prepare anything for the meeting.

Note: The details that you enter here are available only when editing the event; they do not display in the event popup window when users hover over the event. You should not assume that all users will read these details. Important details about the meeting should be communicated in a different way, for example, through the meeting notification email or by creating an announcement.

12. (Optional) Select **Private** if you do not want other users to be able to view your personal events.

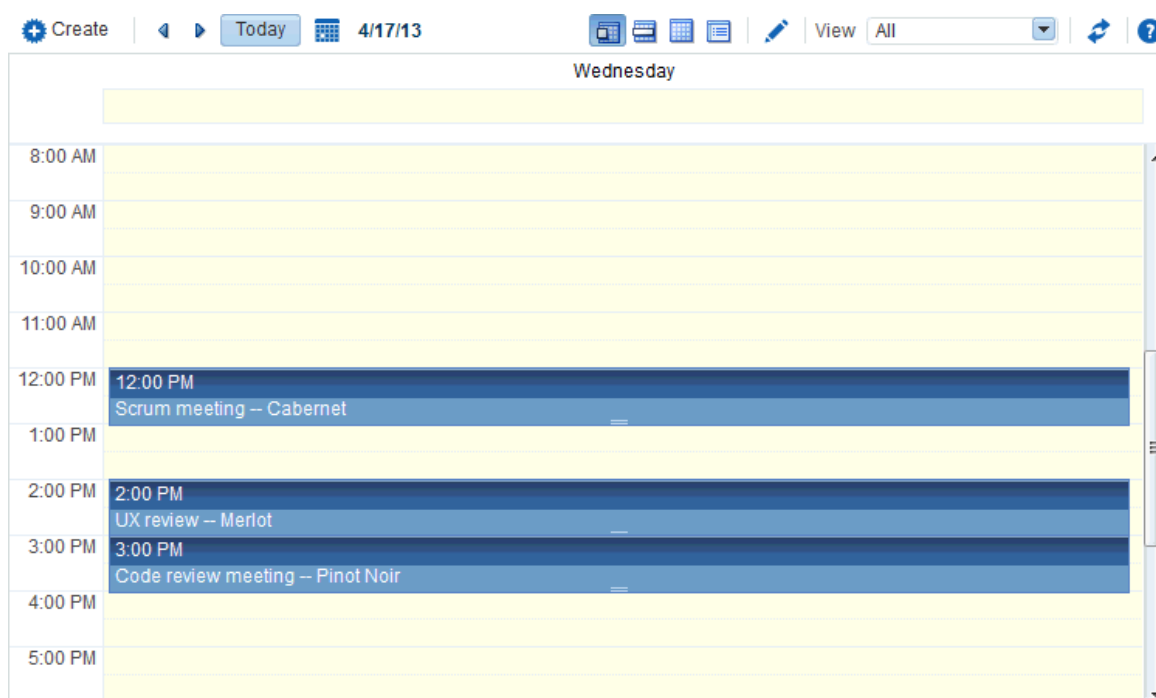
If events are included on a page in the Home portal that you have made available to other users, then those users are not able to see the event.

Note: The **Private** check box is available only for personal events.

13. Click **Create** to add the event to the calendar.

Figure 29–20 shows events in day view.

Figure 29–20 Events in Day View



29.2.4 Revising Scheduled Events

You may want to change some aspect of an event; for example, it may become necessary to change the time to accommodate a particular attendee, or the location may become unavailable.

To revise a scheduled event:

1. Click the event to open the Edit Event dialog (Figure 29–21) or right-click and select **Edit** (Figure 29–22).

Tip: In the Events view or **Events** page, you can also access the Edit Event dialog by right-clicking an event and selecting **Edit**, or by moving the mouse pointer (or using the Tab key) to highlight an event and pressing Enter.

Figure 29–21 Edit Event Dialog Invoked from a Portal Page

2. Revise the event details.

See Also: [Section 29.2.3, "Scheduling Events"](#) for information about the different options available in the dialog.

[Section 13.1, "About the Send Mail Feature"](#) for information about using the Send Mail feature.

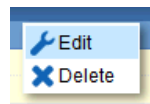
[Section 32.2, "Working with Links Features"](#) for information about creating links to other assets.

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

29.2.5 Cancelling Scheduled Events

To cancel a scheduled event:

1. Right-click the event and select **Delete** (Figure 29–22).

Figure 29–22 Delete Option for an Event

Tip: You can also delete an event by hovering your mouse over the event and pressing the `Delete` key or, in the Edit Event dialog (see [Section 29.2.4, "Revising Scheduled Events"](#)), by clicking **Delete**.

To delete an event from the Events - Mini View, you must open the Edit Event dialog and click **Delete**.

2. Click **Delete** in the Delete Confirmation dialog.

The event is removed from the calendar.

29.2.6 Displaying Multiple Calendars Together

Within WebCenter Portal, you can be a member of several portals. Each of those portals may have its own calendar of events. In addition to that, you may also have your own calendar where you track those events that concern only yourself. At the start of each day, it is not practical to have to view each of these calendars individually to determine your schedule for the day.

WebCenter Portal lets you view multiple calendars together. This is called *calendar overlaying*. You can do this in the Home portal so that you can also include your personal appointments from your personal calendar as well as view events from other portals. You can also overlay calendars in the Events view on a portal page.

Note: Multiple calendars are available if calendar overlaying is enabled (see [Section 29.1.1, "Calendar Overlaying"](#)). Multiple calendars are *not* available on the Events page. Calendar overlaying must be enabled on the Home portal page and the page in your portal where you can view events.

See also, [Section 29.1.2, "Where to View Events."](#)

The events from each calendar are displayed in a different color to help identify the source of the event. (Categories are available if your portal moderator set up categorization for events.) If calendars are overlaid on a page in the Home portal or on a portal page, category colors are used only for events from the current portal. All events from overlaid calendars are displayed in the color defined for that portal if the events do *not* have categories. But if the overlaid calendars have event categories, then the events *with* category will be shown for the calendars from other portals, provided the portal in which overlay is enabled has that same category.

This section includes the following topics:

- [Section 29.2.6.1, "Displaying Additional Calendars"](#)
- [Section 29.2.6.2, "Editing Calendar Display Options"](#)

29.2.6.1 Displaying Additional Calendars

When the calendar overlaying feature is enabled, users can display as many calendars as they want. Each calendar's events are displayed in a different color to make it easier to distinguish which calendar it belongs to.

To display additional calendars:

1. Go to the Home portal or the appropriate portal and locate the page that contains events.
2. In the calendar overlay area of events, click the **Add Calendar** icon (Figure 29–23).

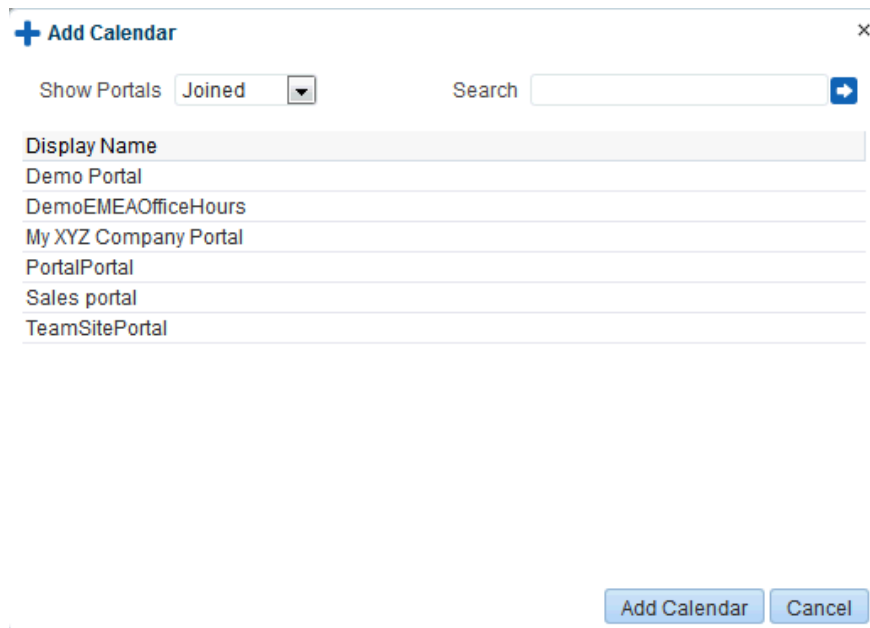
Figure 29–23 Add Calendar Icon



3. In the Add Calendar dialog (Figure 29–24), select the portal whose calendar you want to display.

You can select multiple portals.

Figure 29–24 Add Calendar Dialog

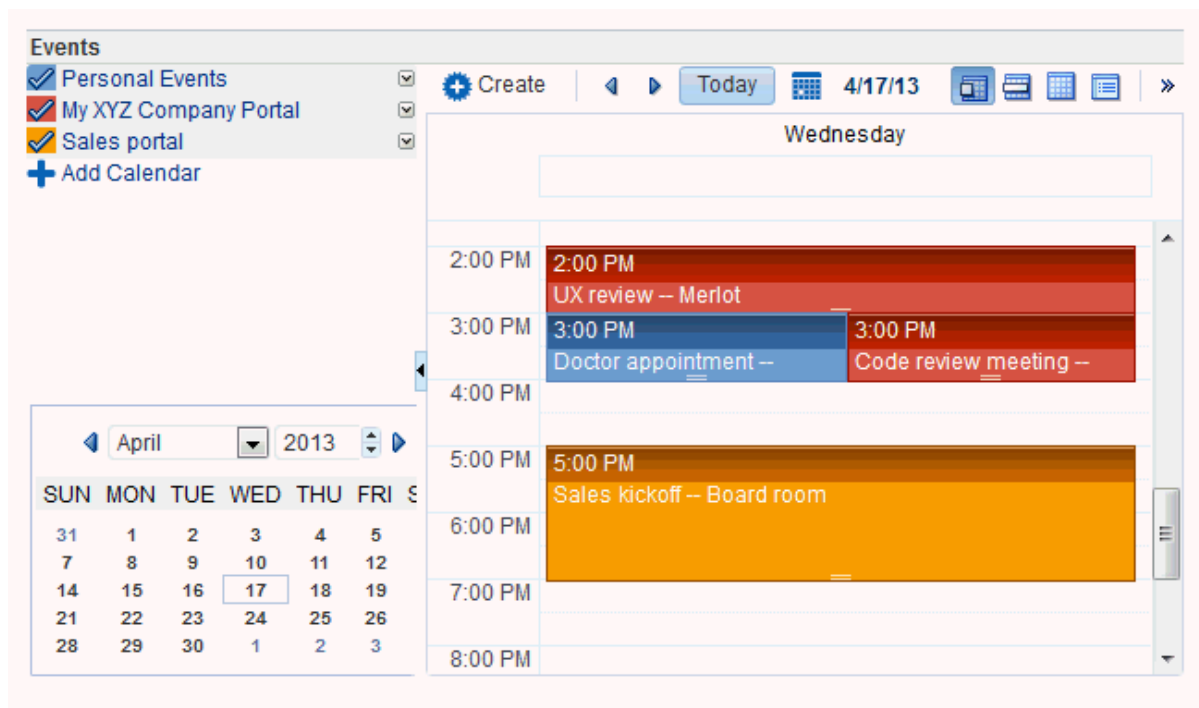


4. Click **Add Calendar**.
The calendar overlay area now includes the selected portals on the left.
5. Select the check box next to each portal whose calendar you want to view.

Note: Events must be enabled and available in the portals you select.

The events from each portal are displayed in a different color (Figure 29–25).

Figure 29–25 Events From Multiple Calendars



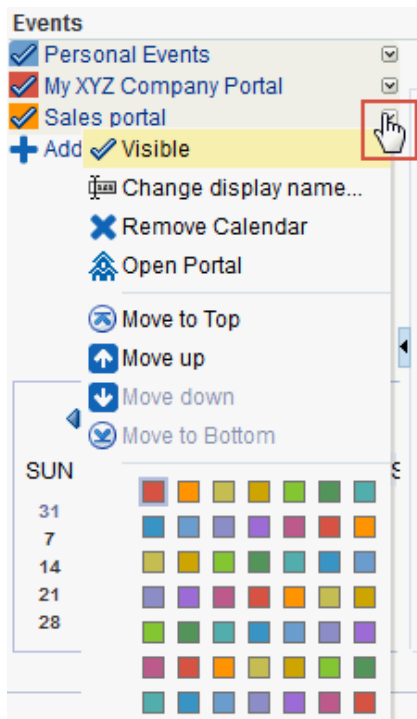
29.2.6.2 Editing Calendar Display Options

After adding a portal's events to your calendar you can change various display options, including the order the calendar appears in the list and the color used to identify events from the calendar.

To edit calendar display options:

1. Go to the Home portal or the appropriate portal and locate the page that contains events.
2. Click the arrow icon to the right of the portal for which you want to edit display options.

The calendar overlay menu is displayed (Figure 29–26).

Figure 29–26 Calendar Overlay Menu

3. From the menu, select:

- **Visible** to toggle the display of this portal's events in the calendar.
You can also toggle the display of a portal's events by clicking the portal name (Full view only) or the colored square next to the portal name.
- **Change display name** to make the name in the list of portals in Full view more meaningful to you than just the portal name.
- **Remove Calendar** to remove this portal's calendar.
- **Open Portal** to open the portal associated with this calendar.
- **Move to Top/Move up/Move down/Move to Bottom** to rearrange this portal in the list.
The order in which the portals are listed determines the order in which events are listed when events from multiple portals occur in the same time slot. Events from the portal at the top of the list are displayed first.
- A color to change the color used for the events from this portal.

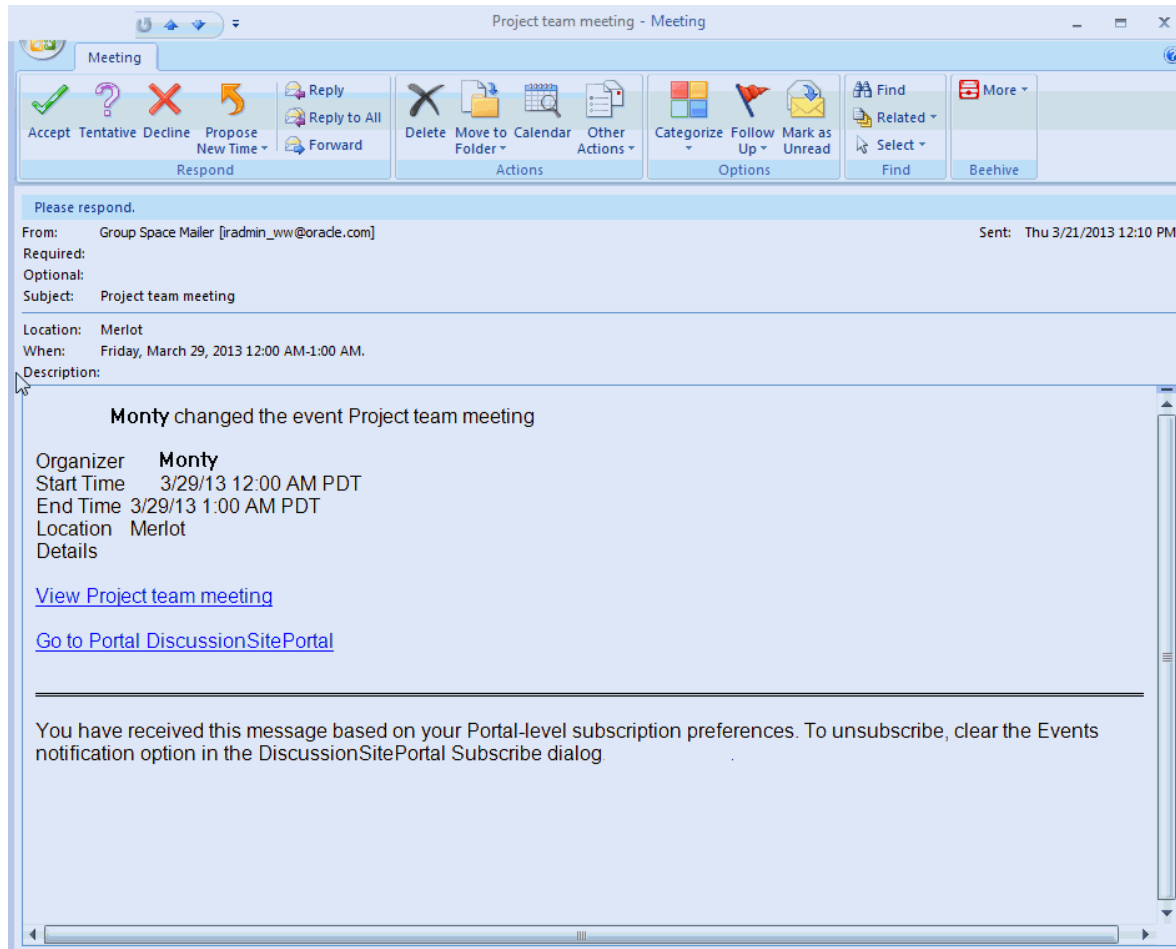
29.2.7 Subscribing to Events

By default, if you subscribe to be notified when an event is created, updated, or deleted, the notification appears in your Activity Stream (if the view is available in your portal). However, you can subscribe to receive notifications by mail when events for a particular portal are created, updated, or deleted.

See Also: See [Section 22.3, "Subscribing to the Application, to Portals, and to Objects"](#) for information about how to subscribe.

When you subscribe to a portal's events, whenever an event is created, updated, or deleted in that portal, a notification is sent to you. If the client to which that notification is sent supports iMIP (for example, Microsoft Outlook, Mozilla Thunderbird, Gmail, and so on), the notification email includes the ability to accept or decline the event, propose a new time for the event, and so on within the email.

Figure 29–27 *Email Notification for a Portal Event*



If you accept an event, it is added to your calendar in your email client.

Managing Your Notes

This chapter describes the features and functions of notes, and provides details about how to work with notes, such as creating and editing personal notes.

This chapter includes the following topics:

- [Section 30.1, "About Notes"](#)
- [Section 30.2, "Working with Notes"](#)

Permissions: This chapter is intended for WebCenter Portal users interested in creating personal notes in WebCenter Portal. The tasks described in this chapter are available to any WebCenter Portal user with access to a page that contains notes. However, to add linked notes to an asset, you have to be in the portal participant role.

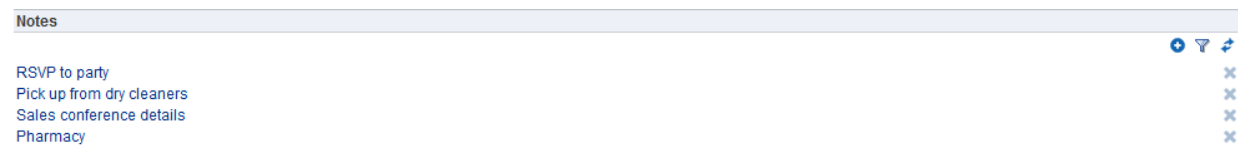
You will not be able to do some tasks if *one* or more of the following advanced permissions for notes have been set:

- Create, Edit and Delete Notes
- Create Notes
- Edit Notes
- Delete Notes
- View Notes

Note: Tasks discussed in this chapter are not available to you if notes is not exposed. The portal moderator configures and adds the notes viewer, as described in the "Adding Personal Notes to a Portal" chapter in *Building Portals with Oracle WebCenter Portal*.

30.1 About Notes

Notes is useful for writing yourself reminders in the form of personal notes. You can create notes from the Notes view, which displays the personal notes of the currently logged in user ([Figure 30–1](#)). Only the notes that you create are displayed in the Notes view. No other user sees your notes, and you do not see any other user's notes.

Figure 30–1 Notes View

You can filter your notes list by their titles. Filtering allows you to narrow the focus of your notes to just the notes that match your filtering criteria. Consider devising a naming scheme for your notes to make the most of filtering.

You can link a note to an asset like a document, a list, or an announcement. While you can link to a new note ([Figure 30–10](#)), you cannot link to existing notes. All users who have access to the asset can view the linked note too. See [Section 30.2.6, "Linking Notes"](#) for more information.

30.2 Working with Notes

WebCenter Portal offers a way for you to keep track of useful, sometimes vital, bits of information through notes.

This section describes how to use notes. It includes the following topics:

- [Section 30.2.1, "Creating a Note"](#)
- [Section 30.2.2, "Filtering and Clearing Filters Notes"](#)
- [Section 30.2.3, "Editing Note Details"](#)
- [Section 30.2.4, "Refreshing Your View of Notes"](#)
- [Section 30.2.5, "Deleting Notes"](#)
- [Section 30.2.6, "Linking Notes"](#)

30.2.1 Creating a Note

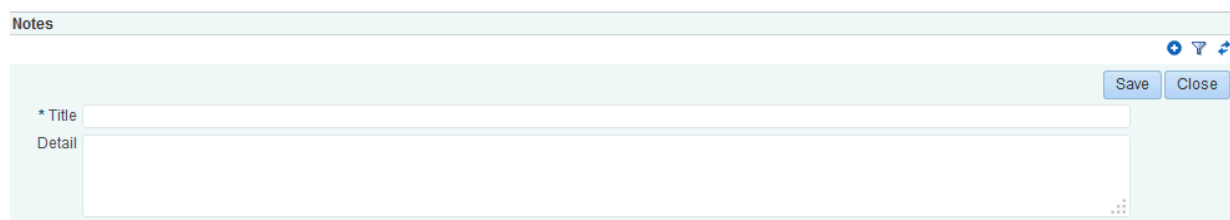
Create notes to track personally relevant bits of information, such as personal reminders, and so on. This section describes how to create a note.

To create a note:

1. Navigate to the page that contains the Notes view.
2. Click the **Create a new note** icon ([Figure 30–2](#)).

Figure 30–2 Create a New Note Icon in a Notes View

A panel opens with fields for entering your note ([Figure 30–3](#)).

Figure 30–3 Panel for Creating a New Note

Click the Create icon to create a note.

3. In the **Title** field, enter a note title.

The note title is rendered as a link in the list of notes. You can filter your notes by their titles. Consider devising a naming scheme for your notes to make the most of filtering. See [Section 30.2.2, "Filtering and Clearing Filters Notes"](#) for more information.

4. In the **Detail** field, enter the note content.
5. Click **Save** to save the note.

When you click **Save**, the detail panel remains open, allowing you to create additional notes. After you finish, click **Close** to exit the panel.

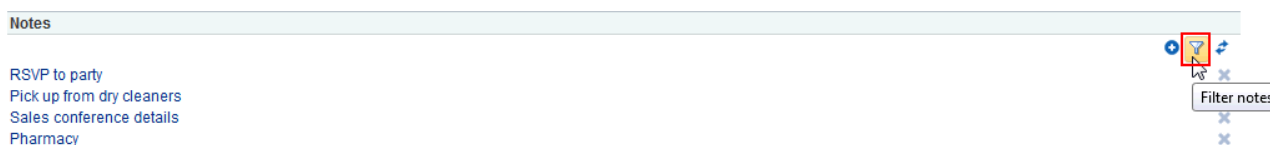
30.2.2 Filtering and Clearing Filters Notes

Your note list may become lengthy, making it a challenge to find a particular note. In a given session, you can shorten the list of notes by filtering out all but the note titles that contain your filtering criteria. Enter a search or filter value to temporarily limit the display to notes that match your criteria. You can search the notes list by whole or partial words. Filtering looks for matches anywhere in the title.

To clear the filter, click the filtering icon again.

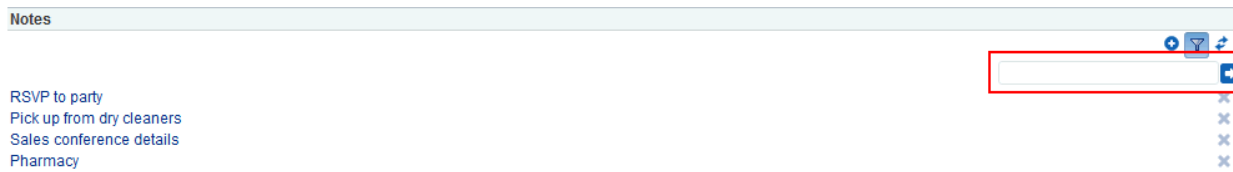
To filter notes:

1. Navigate to the page that contains the notes view, and click the **Filter notes** icon ([Figure 30–4](#)).

Figure 30–4 Filter Notes Icon

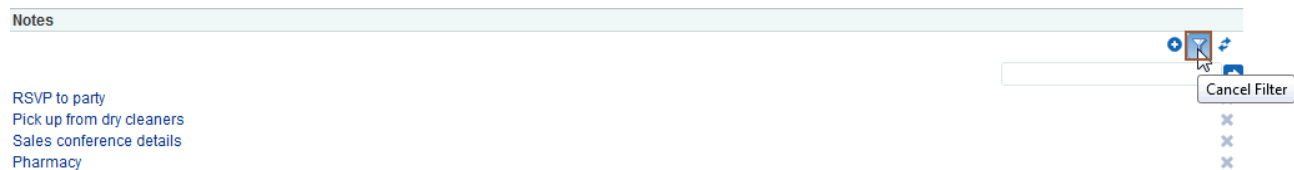
A filtering toolbar opens.

2. Enter your search term in the field provided in the filtering toolbar, then click the **Filter** icon next to the field, to apply the filter ([Figure 30–5](#)).

Figure 30–5 Filtering Toolbar

Note: Filtering (or search) terms are not case sensitive. You can use whole or partial words. Filtering looks for matches anywhere in the title.

3. Click the **Cancel Filter** icon to remove the filter and display your entire list of notes (Figure 30–6).

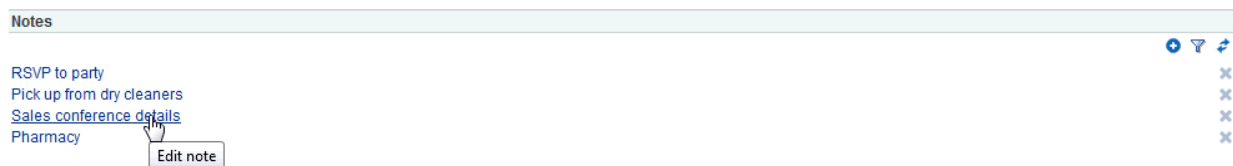
Figure 30–6 Cancel Filter Icon

30.2.3 Editing Note Details

If you need to do so, you can easily update the details of your notes.

To edit note details:

1. Navigate to the page that contains the notes view, then click the title of the note that you want to edit (Figure 30–7).

Figure 30–7 Edit Note Shown for a Note Title in the Notes View

The Notes panel opens at the top of your notes list.

2. Edit the details in the **Title** and **Detail** fields.
3. Click **Update** to save your changes and exit the edit panel.

30.2.4 Refreshing Your View of Notes

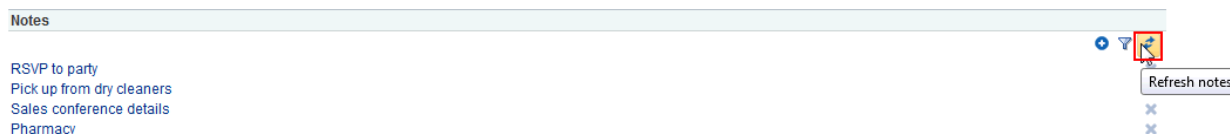
The notes view includes a **Refresh notes** icon that you can use to refresh your display of notes (Figure 30–8). Refreshing your view of notes is useful for viewing any recent changes.

To refresh the Notes view:

- Navigate to the page that contains the Notes view, then click the **Refresh notes** icon (Figure 30–8).

Note: Do not click the Reload or Refresh button in your browser. Click the **Refresh** icon to update your view.

Figure 30–8 Refresh Notes Icon in the Notes View



The notes view is updated to show recent changes.

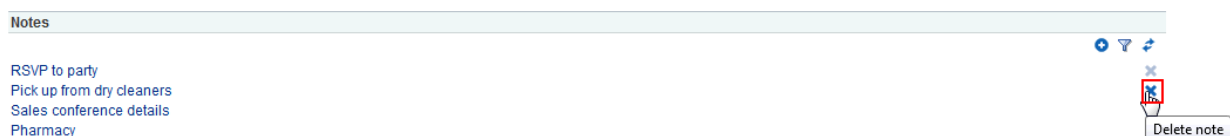
30.2.5 Deleting Notes

When a note has outlived its usefulness, you can remove it from your notes view. Each note has its own **Delete note** icon.

To delete a note:

1. Navigate to the page that contains the Notes view, and click the **Delete note** icon next to the note you want to delete (Figure 30–9).

Figure 30–9 Delete Note Icon



A Delete Note confirmation dialog opens.

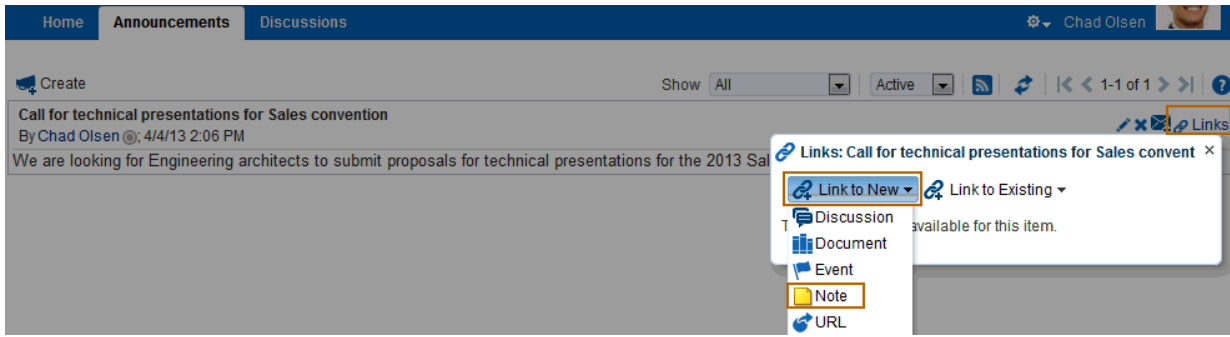
2. Click the **Delete** button to delete the applicable note.

30.2.6 Linking Notes

You can create a linked note to an asset. For example, when working on a list, you can create a note from the list or from a list row, and that note is linked to the entire list or the row from where you created the linked note. For more information about creating linked notes, see [Section 32.2.2.5, "Adding and Linking to a Note."](#)

[Figure 30–10](#) shows a note that is created from and linked to an announcement.

Figure 30–10 *Linking an Announcement to a New Note*



Working with Lists

This chapter describes how to use the features offered through lists. It describes how to create and publish lists, and manage lists in WebCenter Portal.

This chapter includes the following topics:

- [Section 31.1, "About Lists"](#)
- [Section 31.2, "Working with Lists Features"](#)

Permissions: This chapter is intended for WebCenter Portal users interested in creating and managing lists in WebCenter Portal. The tasks described in this chapter are available to any WebCenter Portal user with access to a page that contains a list.

However, you might not be able to do some tasks if *one* or more of the following advanced permissions for lists have been set:

- Create, Edit, and Delete Lists
- Create Lists
- Edit Lists
- Delete Lists
- Edit List Data
- View Lists

Note: Tasks discussed in this chapter are not available if lists is not enabled and exposed. The portal moderator adds and configures lists, as described in the "Adding Lists of Information to a Portal" chapter in *Building Portals with Oracle WebCenter Portal*.

31.1 About Lists

You can create, publish, and manage lists in WebCenter Portal. [Figure 31-1](#) shows a list in the List viewer.

Figure 31–1 A List in the List Viewer

No.	Description	Target Date	Assigned	Status	Comments
1222	Add banner text to all consoles	6/28/13 12:00 AM	Ari Spice	Open	
2315	Create first draft of beta plan	7/1/13 12:00 AM	Chad Olsen	Open	
3262	Add updated features list to project portal	6/18/13 12:00 AM	Chad Olsen	Open	
22222	Change Apply buttons to Save on all dialogs	6/26/13 12:00 AM	Wendy Devmore	Open	

Lists are useful for many portal activities, such as tracking issues, capturing project milestones, publishing project assignments, and much more. The lists you create in WebCenter Portal can be widely varied in their complexity. For example, you can start with a list of team members, and then include columns for contact information, project role, and links to relevant documents, such as any plans or proposals associated with a listed team member.

Lists are available to all portals except the Home portal. Whether the Lists view or Lists page (or console) is exposed for use depends on the actions of your portal moderator. For more information about working with lists as a portal moderator, see the "Adding Lists of Information to a Portal" chapter in *Building Portals with Oracle WebCenter Portal*.

The lists you create in a portal are unique to that portal. A portal cannot consume the lists created in another portal.

Create and populate lists using the controls on the **Lists** page or console. Users must have appropriate permissions to perform actions on lists.

If the Lists page is available, use the controls on the **Lists** page to create and revise lists and list data and to view all of a portal's current lists. Figure 31–2 shows a list on the List page or console.

Figure 31–2 A List on the Lists Page

No.	Description	Target Date	Assigned	Status	UX snapshot
22222	Change Apply buttons to Save on all dialogs	6/26/13 12:00 AM	Wendy Devmore	Open	
1222	Add banner text to all consoles	6/28/13 12:00 AM	Ari Spice	Open	
2315	Create first draft of beta plan	7/1/13 12:00 AM	Chad Olsen	Open	
3262	Add updated features list to project portal	6/18/13 12:00 AM	Chad Olsen	Open	

On the **Lists** page or console, you can make use of templates for rapid creation of lists and tools for designing and revising list structure. If you prefer, you can create a list from scratch, adding, and configuring all of the columns yourself, or you can create a list from an Excel spreadsheet. See Section 31.2.2, "Creating and Managing Lists" for more information.

The lists that you create using the Lists page appear on the List viewer (if available) on another page. While you can use the Lists page or console to create different lists, the List viewer (Figure 31-3) provides a means of working with a particular list on a page.

Figure 31-3 A List in the List Viewer

Project milestones			
Date	Description	Status	
4/1/13	Project kickoff	Completed	
4/1/13	Send out project plan for review	Completed	
4/2/13	Assign resources	Completed	
4/17/13	Draft requirements list	In Progress	
4/30/13	Update project plan; get signoffs	In Progress	
5/31/13	Build test cases	Not yet started	

The List viewer provides easy access to all the features required for adding and revising list data, importing/exporting list data, filtering list data, obtaining a list RSS feed, and linking to other WebCenter Portal assets from the list and from a row in the list.

Additionally, the List viewer provides access to customization tools that enable you to control the look of a particular list instance and its data. For example, use customization to control color banding of rows or columns or to apply filters to list data. See [Section 31.2.4, "Customizing Lists"](#) for more information.

Use the **Lists** page and the List viewer to add and revise list data throughout the life of the list (see [Section 31.2.3, "Adding and Managing List Data"](#)). Add and revise content directly on a list, or use the list Export and Import features to send list data to an Excel file, revise it there, and then import it back into the original list in WebCenter Portal (see [Section 31.2.6, "Exporting a List and Importing a List from an Excel Spreadsheet"](#)).

If the **Lists** page (or console) is not shown, you can open the Personalize Pages page to show the **Lists** page in your view of the portal. See [Section 10.12.1, "Showing or Hiding Pages in Your View of a Portal"](#) for more information. To expose the Lists page to all portal members, the portal moderator needs to add the page link to the portal navigation, as described in the "Adding an Existing Page to the Portal Navigation" section in *Building Portals with Oracle WebCenter Portal*.

Note: Lists are not available in the Home portal.

Through its tight integration with links, lists provide 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. For more information, see [Section 31.2.3.5, "Working with Links in Lists and List Rows."](#)

Lists additionally provide RSS feeds for all lists and for individual lists. For information about lists and RSS, see [Section 27.2.3, "Obtaining List News Feeds."](#)

31.2 Working with Lists Features

This section provides information about using the features available through the **Lists** page and the List viewer. It includes the following topics:

- [Section 31.2.1, "Viewing Lists"](#)

- [Section 31.2.2, "Creating and Managing Lists"](#)
- [Section 31.2.3, "Adding and Managing List Data"](#)
- [Section 31.2.4, "Customizing Lists"](#)
- [Section 31.2.5, "Sending a Link to a List to Other Users"](#)
- [Section 31.2.6, "Exporting a List and Importing a List from an Excel Spreadsheet"](#)

31.2.1 Viewing Lists

To view the lists associated with a particular portal, you must have access to that portal. If you have access, you can view all of a portal's lists on its **Lists** page or console. The List viewer can also be added to a page in WebCenter Portal by the portal moderator. See [Figure 31–3](#) for a list displayed in the List viewer and [Figure 31–4](#) for lists on a Lists page.

The **Lists** page is available in a portal if Lists is enabled and a Lists page has been made available by the portal moderator. For information about enabling tools in a portal, see the "Enabling and Disabling Tools and Services Available to a Portal" section in *Building Portals with Oracle WebCenter Portal*.

If the **Lists** page is not shown, you can open the Personalize Pages page to show the **Lists** page in your view of the portal. See [Section 10.12.1, "Showing or Hiding Pages in Your View of a Portal"](#) for more information. To expose the Lists page to all portal members, the portal moderator needs to add the page link to the portal navigation, as described in the "Adding an Existing Page to the Portal Navigation" section in *Building Portals with Oracle WebCenter Portal*.

To view a list on the Lists page or console:

1. Go to the portal that contains the list you want to view, and open the Lists page.
2. From the Lists panel, select the list you want to view.

List details appear on the right ([Figure 31–4](#)).

Figure 31–4 List of Lists on a Lists Page

No.	Description	Target Date	Assigned	Status	UX snapshot
22222	Change Apply buttons to Save on all dialogs	6/26/13 12:00 AM	Wendy Devmore	Open	
1222	Add banner text to all consoles	6/28/13 12:00 AM	Ari Spice	Open	
2315	Create first draft of beta plan	7/1/13 12:00 AM	Chad Olsen	Open	
3262	Add updated features list to project portal	6/18/13 12:00 AM	Chad Olsen	Open	

Note: If RSS is enabled in the portal, you can track the creation of and revisions to lists from one convenient location: your favorite news reader. See [Section 27.2.3, "Obtaining List News Feeds."](#)

31.2.2 Creating and Managing Lists

This section describes how to create, edit, copy, and delete lists on the **Lists** page or console.

This section includes the following topics:

- [Section 31.2.2.1, "Creating Lists"](#)
- [Section 31.2.2.2, "Editing List Structure"](#)
- [Section 31.2.2.3, "Copying a List"](#)
- [Section 31.2.2.4, "Deleting Lists"](#)

31.2.2.1 Creating Lists

Note: You can create a new list if the Lists page or console is available. If your portal moderator has placed a list viewer on a page, you will not be able to create a new list.

In WebCenter Portal, you can create a list using one of the following methods:

- Create a blank list for which you create and configure all columns (up to 30).
- Create a list from a template, and use the template or modify the template.
- Create a list from a Microsoft Excel spreadsheet.

This section describes how to create a list using each method.

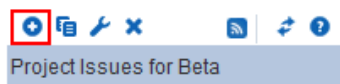
To create a list:

1. Go to the Lists page (or console) of the portal where you want to create a list.

See Also: For information about navigating to a Lists page, see [Section 31.2.1, "Viewing Lists."](#) If the Lists page is not exposed, you will not be able to create a new list.

2. In the Lists panel toolbar, click the **Create a new list** icon ([Figure 31-5](#)).

Figure 31-5 Create a New List Icon on a Lists Page



3. In the Create List dialog, enter a name for the list in the **Name** field ([Figure 31-6](#)).

Figure 31–6 Create List Dialog

4. Optionally, in the **Description** field enter a description of the list.

Tip: In a completed list, the description appears between the list title and list data.

5. For **Create From**, select to create the list using a predefined **Template** or from an **Excel Spreadsheet**.
6. If you select to create a list from a **Template**, select a template from the **Template** drop-down list:
 - **Custom List**—To create a list without using a template.
 - **Issues**—To create a list of, for example, project issues. By default, this template provides the columns No., Description, Target Date, Assigned, Status, and Comments.
 - **Milestones**—To create a list of, for example, project milestones. By default, this template provides the columns Date, Description, and Status.
 - **Objectives**—To create a list of, for example, project objectives. By default, this template provides the columns Title and Description.

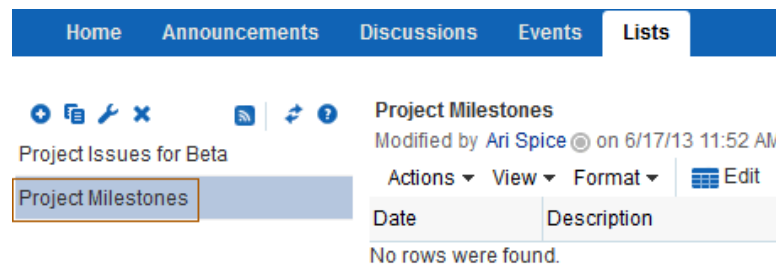
If you select to create a list from an **Excel Spreadsheet**, click **Browse** to navigate to and select the spreadsheet:

- The first row of the spreadsheet is used as column headings. The subsequent rows are added as data.
- All the columns are created with the data type `Plain Text`. After creation, you can modify the data types as desired. For information about data types, see [Table 31–1](#).

Tip: You can use the **Excel Spreadsheet** option to import a list from a different portal or from a different WebCenter Portal instance. That is, you can export the list from the portal or WebCenter Portal instance and import it into the current portal or instance.

7. Click **OK**.

The new list appears in the Lists panel on the Lists page ([Figure 31–7](#)).

Figure 31–7 Newly Created List on the Lists Page (Console)

You may now revise default list columns and add new columns to the list by clicking the **Edit list** icon. For more information, see [Section 31.2.2.2, "Editing List Structure."](#) For a custom list, you must add columns to the list before you can add rows.

See Also: For information about adding new list rows, see [Section 31.2.3, "Adding and Managing List Data."](#)

31.2.2.2 Editing List Structure

When you edit list structure, you can revise everything about the list. For example, you can change column details; remove, add, and rearrange columns; and rename or add another description for the list.

Note: You can edit a list if the Lists page or console is available. If your portal moderator has placed a list viewer on a page, you will not be able to create or edit a list.

This section describes the various tasks you can perform while editing a list structure. It contains the following topics:

- [Section 31.2.2.2.1, "Renaming a List and Revising a List Description"](#)
- [Section 31.2.2.2.2, "Adding Columns to a List"](#)
- [Section 31.2.2.2.3, "Revising List Column Details"](#)
- [Section 31.2.2.2.4, "Rearranging List Columns on All Instances of a List"](#)
- [Section 31.2.2.2.5, "Deleting a List Column"](#)

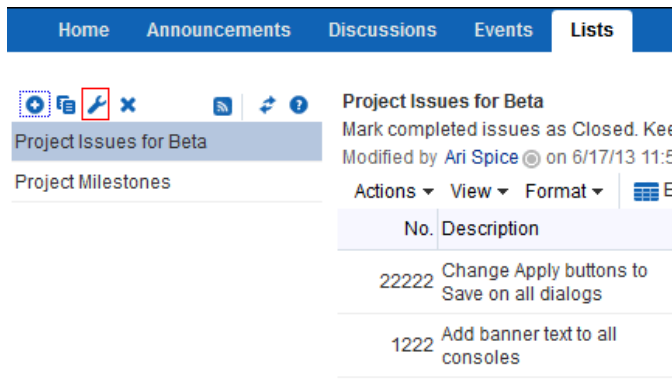
31.2.2.2.1 Renaming a List and Revising a List Description To rename a list and revise a list description:

1. Go to the portal where you want to rename a list or revise a list description, and open its Lists page.

See Also: For information about navigating to a Lists page, see [Section 31.2.1, "Viewing Lists."](#) If the Lists page is not exposed, you will not be able to rename a new list or revise its description.

2. In the Lists panel, select the list you want to change, and click the **Edit list** icon ([Figure 31–8](#)).

Figure 31–8 Edit List Icon on Lists Page



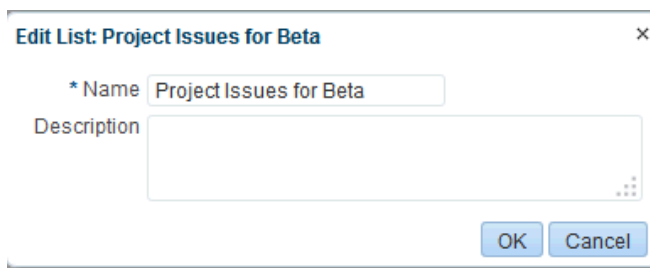
The list displays in edit list mode (Figure 31–9).

Figure 31–9 List in Edit List Mode



3. Click **Edit** to the right of the **Name** field to open the Edit List dialog (Figure 31–10).

Figure 31–10 Edit List Dialog



4. Revise the list name, and enter or revise the description.
5. Click **OK** to close the dialog and save your changes.
6. Click the **Close** button in edit list mode to return to view list mode.

For example, if you add a description, notice the description at the top of the list, under the list name (Figure 31–11).

Figure 31–11 List Description

No.	Description	Target Date	Assigned
22222	Change Apply buttons to Save on all dialogs	6/26/13	Wendy Devmore
1222	Add banner text to all consoles	6/28/13	Ari Spice

31.2.2.2.2 Adding Columns to a List This procedure is useful when you create a custom list or you want to alter a list that you created from a template or a spreadsheet.

Note: A list supports up to 30 columns.

When you add a column to a list, the new column is added after the selected column. If no column is selected, the new column is added as the first column.

To add columns to a list:

1. Go to the Lists page of the portal where you want to add columns to a list.

See Also: For information about navigating to a Lists page, see [Section 31.2.1, "Viewing Lists."](#) If the Lists page is not exposed, you will not be able to add columns.

2. In the Lists panel, select the list to which to add columns and click the **Edit list** icon ([Figure 31–12](#)).

Figure 31–12 Edit List Icon

No.	Description	Target Date	Assigned
22222	Change Apply buttons to Save on all dialogs	6/26/13	Wendy Devmore
1222	Add banner text to all consoles	6/28/13	Ari Spice

The Lists page displays in edit list mode ([Figure 31–13](#)).

Figure 31–13 List in Edit List Mode

Edit List: Project Issues for Beta

Name Project Issues for Beta [Edit](#)

Description Mark completed issues as Closed. Keep Assigned Issues as Open.

Modified By Ari Spice on 6/17/13 11:57 AM

Columns

Create [Edit](#) [Delete](#) [Refresh](#)

Name
No.
Description
Target Date
Assigned
Status
Comments

- Under **Columns**, click the **Create** button to open the Create Column dialog (Figure 31–14).

Figure 31–14 Create Column Dialog

Create Column ? x

* Name

* Data Type Plain Text v

Required

Default Value

Maximum Length characters

Number of Lines for Editing

Allow Links Link Window v

Display Width pixels

Hint

OK Cancel

Tip: Select a column to add a new column after it.

- In the **Name** field, provide a name for this column.
- From the **Data Type** list, select the type of data you want to enter in this column.

Note: The data type you select affects the type of data that can be entered for the column and the way the data is rendered (see [Table 31-1](#) and [Table 31-2](#)). It also affects the type of validation that is done on column data when you and other authorized users add list rows. For example, if you select a `DateTime` data type, and a user enters text that is not in the `DateTime` format, WebCenter Portal displays an error.

[Table 31-1](#) lists and describes the data types available to list columns, and provides information about the additional details that appear for each type.

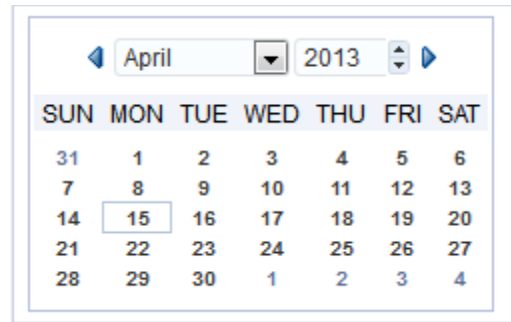
See Also: For information about additional column details, see [Table 31-2, "Data Type Column Details"](#).

Table 31–1 Data Type Selections for List Columns

Data Type	Description	Comments
Plain Text	Unformatted text, provides options for making the text a link	Additional column details include: <ul style="list-style-type: none"> ■ Required ■ Default Value ■ Maximum Length ■ Number of Lines for Editing ■ Allow Links ■ Link Window ■ Display Width ■ Hint
Rich Text	Rich, formatted text entered through a rich text editor, may include links	Additional column details include: <ul style="list-style-type: none"> ■ Required ■ Display Width ■ Hint
Number	Numerical values	Additional column details include: <ul style="list-style-type: none"> ■ Required ■ Format ■ Default Value ■ Minimum Value ■ Maximum Value ■ Display Width ■ Hint For Format, select from: <ul style="list-style-type: none"> ■ Number—an unformatted number; decimal separator is based on the currently selected locale. For more information, see Section 5.2, "Setting Your Preferred Display Language." ■ Currency—value is formatted as a currency value; the currency symbol and decimal separator are based on the currently selected locale. For more information, see Section 5.2, "Setting Your Preferred Display Language." ■ Percent—value is formatted as a percentage; the value <i>0.6</i> is formatted as <i>0.6%</i>; the value <i>60</i> is formatted as <i>60%</i>. The Number data type supports numbers from $\pm 1.79769313486231570e+308$ with 14 to 15 significant digits. ¹

Table 31-1 (Cont.) Data Type Selections for List Columns

Data Type	Description	Comments
DateTime	Dates and times in the format specified in a given user's WebCenter Portal Preferences (for more information, see Section 5.3, "Setting Date and Time Preferences")	<p>Additional column details include:</p> <ul style="list-style-type: none"> ■ Required ■ Format ■ Default Value ■ Display Width ■ Hint <p>For Format, select from:</p> <ul style="list-style-type: none"> ■ Date—For requiring a date. ■ Time—For requiring a time. ■ Date and Time—For requiring a date and a time. <p>The way the selected Format is rendered is controlled by the user's date and time preferences.</p> <p>The Default Value field includes a date picker, which you can use to select a default date in the correct format. The current date has a box around it, for example, April 15th, in the following figure.</p>



This field does not require leading zeroes, for example, it does not require 04/04/2013. Instead, you can use 4/4/2013.

Table 31–1 (Cont.) Data Type Selections for List Columns

Data Type	Description	Comments
Boolean	Either TRUE or FALSE	Additional column details include: <ul style="list-style-type: none"> Default Value Display Width Hint TRUE or FALSE is rendered as a check box. Selected equals TRUE; deselected equals FALSE.
Picture	A URL to an image (the image is rendered in list view mode)	Additional column details include: <ul style="list-style-type: none"> Required Display Width Hint
Person	A valid user name	Additional column details include: <ul style="list-style-type: none"> Required Range of Users Default Value Display Width Hint The Range of Users field enables you to limit the valid range of users to the membership of the current portal (or to include all users). The Default Value field includes a Find user icon, which you can use to locate and select a default user. For tips on searching for a user in the identity store, see the "Searching for a User or Group in the Identity Store" section in <i>Building Portals with Oracle WebCenter Portal</i> . The list column contains a presence indicator next to the user name. Click the presence indicator to open a context menu with options for making contact with the person instantly. For more information, see Section 12.4.1, "Viewing the Status of Other Users."

¹ Number data-type columns adhere to the range and precision specified for the 8 byte IEEE 754 double data type. When the maximum number of significant digits is exceeded, the number is rounded.

- After you select a data type, enter values for the remaining fields.

[Table 31–2](#) lists the possible remaining fields and their associated data types.

Table 31–2 Data Type Column Details

Column Detail	Description	Associated Data Type(s)
Allow Links	Specify whether to allow column data to be hyperlinked. Specifying Allow Links enables the user to enter both a column value and a URL. If a URL is specified, the column value is rendered as a hyperlink.	Plain Text
Default Value	Optionally, provide a default value for the column entry, such as a default image, number, user name, and the like.	<ul style="list-style-type: none"> Plain Text Number DateTime Boolean Person
Display Width	Enter a value in pixels to set the column width.	All data types

Table 31–2 (Cont.) Data Type Column Details

Column Detail	Description	Associated Data Type(s)
Format	Use this pick list to specify the format for column values. For more information, see Table 31–1 .	<ul style="list-style-type: none"> ■ Number ■ DateTime
Hint	Enter text to assist the user in understanding the content to enter into the column. This text appears when focus is on this column in edit list data mode.	All data types
Link Window	Indicate how a hyperlink on column data should open. Choose from: <ul style="list-style-type: none"> ■ New Window—The link opens in a new browser tab or window. ■ Current Window—The link opens in the current browser window. 	Plain Text
Maximum Length	Enter the maximum number of characters for this column entry. This includes character spaces.	Plain Text
Maximum Value	Indicate the highest number that can be entered in this column.	Number
Minimum Value	Indicate the lowest number that can be entered in this column.	Number
Number of Lines for Editing	Indicate the number of lines to make available for editing. When the value is 1, the user enters data in a single line text field when editing list data. Long values scroll horizontally. When the value is greater than 1, the user enters data in a multiline text field. Long values scroll vertically. This makes entering and viewing large values much easier.	Plain Text
Range of Users	Indicate whether to limit the selection of users to members of the current portal (portal Members) or to allow a selection from all authenticated users (All Users).	Person
Required	Select this check box to require that data is entered in this column.	<ul style="list-style-type: none"> ■ Plain Text ■ Rich Text ■ DateTime ■ Number ■ Picture ■ Person

7. Click **OK** to save your changes and exit the dialog.
8. Click **Close** to exit List Edit mode.

31.2.2.2.3 Revising List Column Details You can revise every detail of a list column. That is, you can rename the column, change the column data type, require a value, or remove a value requirement. Keep in mind, however, if you change a column data type, any values currently entered in the list column are either converted to the new data type or removed irrevocably.

For example, if you move from a `Plain Text` data type to a `Number` data type, values that can be converted to a number are retained; other values are removed. Before any values are removed by the change, you are asked for confirmation. In contrast, if you move from a `Number` data type to a `Plain Text` data type, all values are retained.

Note: Validation occurs only on data entry. If a user changes column details after data has been entered into the column, the existing data is not affected (that is, validated) even if it does not meet the new column detail conditions on the columns.

If you want to validate new list data, you can export the list data to an Excel spreadsheet and then import it. Upon import, all the rows are validated. The rows that fail validation are noted. You can fix invalid rows in the spreadsheet and import again.

See Also: [Section 31.2.6, "Exporting a List and Importing a List from an Excel Spreadsheet."](#)

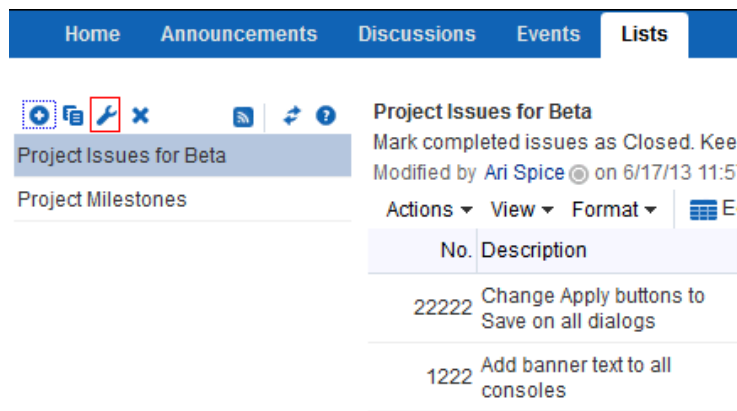
To revise list column details:

1. Go to the Lists page of the portal where you want to revise list column details.

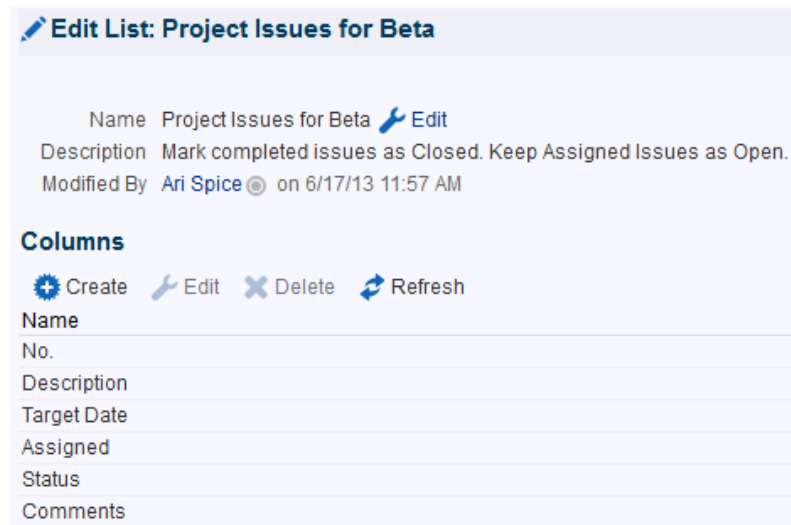
See Also: For information about navigating to a Lists page, see [Section 31.2.1, "Viewing Lists."](#) If the Lists page is not exposed, you will not be able to revise column details.

2. In the Lists panel, select the list you want to change and click the **Edit list** icon ([Figure 31–15](#)).

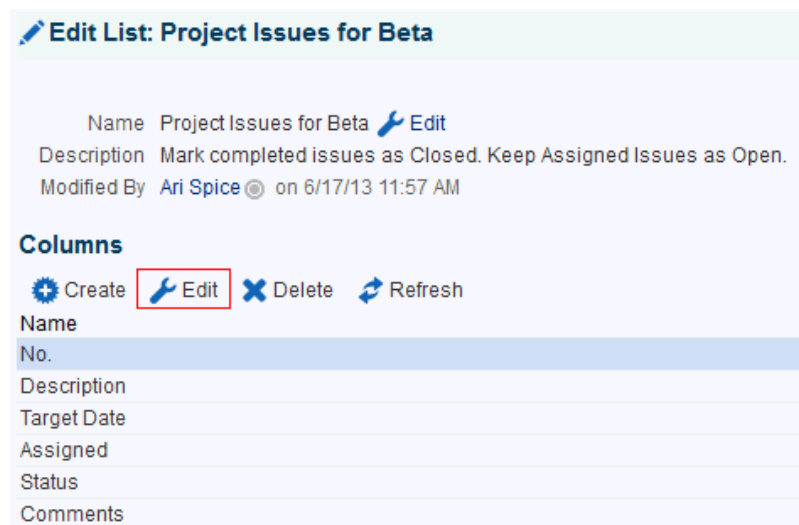
Figure 31–15 Edit List Icon



The Lists page opens in edit list mode ([Figure 31–16](#)).

Figure 31–16 List in Edit List Mode

3. Under **Columns**, select the list column you want to revise and click **Edit** (Figure 31–17).

Figure 31–17 Edit Column

The Edit Column dialog opens (Figure 31–18).

Figure 31–18 Edit Column Dialog

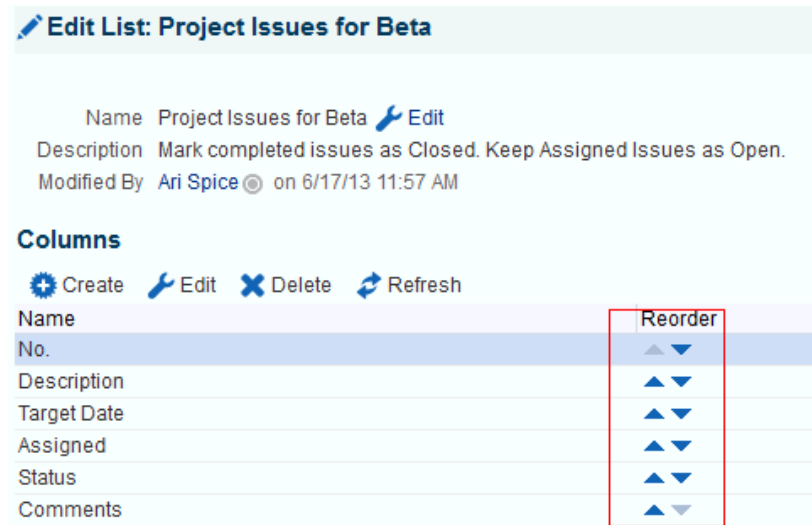
4. Edit column details as you prefer.
See [Section 31.2.2.2.2, "Adding Columns to a List"](#) for information about column details.
5. Click **OK** to save your changes and close the dialog.
6. Click the **Close** button to exit edit list mode.

31.2.2.4 Rearranging List Columns on All Instances of a List You can rearrange list columns in the list structure, affecting all instances of a list, by clicking rearrange icons or by dragging and dropping.

See Also: For information about rearranging column order of a particular list instance in your view or everyone's view, see [Section 31.2.4.3, "Changing Column Order on a List Instance."](#)

To rearrange columns on *all* instances of a list:

1. Go to the Lists page of the portal where you want to rearrange list columns.
See Also: For information about navigating to a Lists page, see [Section 31.2.1, "Viewing Lists."](#) If the Lists page is not exposed, you will not be able to rearrange column details on all instances of a list.
2. In the Lists panel, select the list you want to change and click the **Edit list** icon to open the list edit mode (see [Figure 31–16](#)).
3. In the **Columns** section, click an icon under the **Reorder** column to move a column higher or lower in the order of columns ([Figure 31–19](#)).

Figure 31–19 Reorder Column Icons on Edit List Page

Tip: Moving a column higher causes it to appear further to the left in column display order. Moving a column lower causes it to appear further to the right.

Alternatively, drag and drop a column higher or lower in the column hierarchy.

4. Click the **Close** button to exit list edit mode.

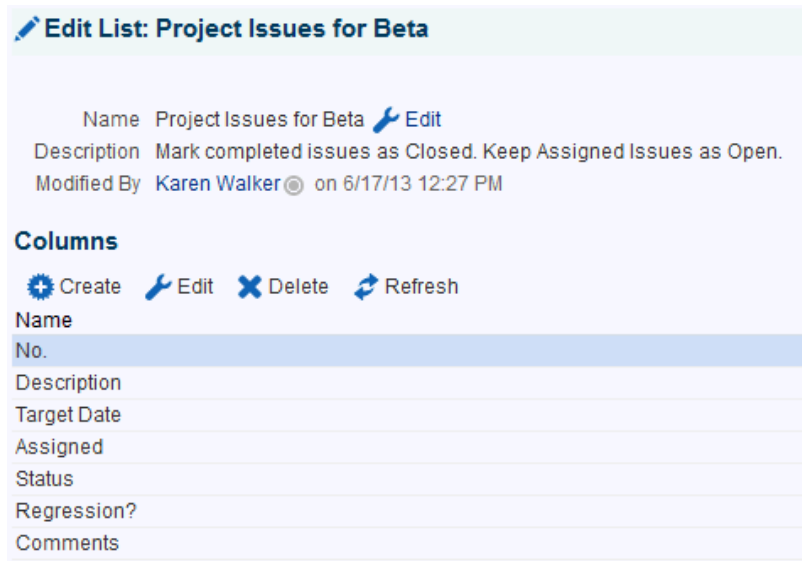
31.2.2.2.5 Deleting a List Column

To delete a list column:

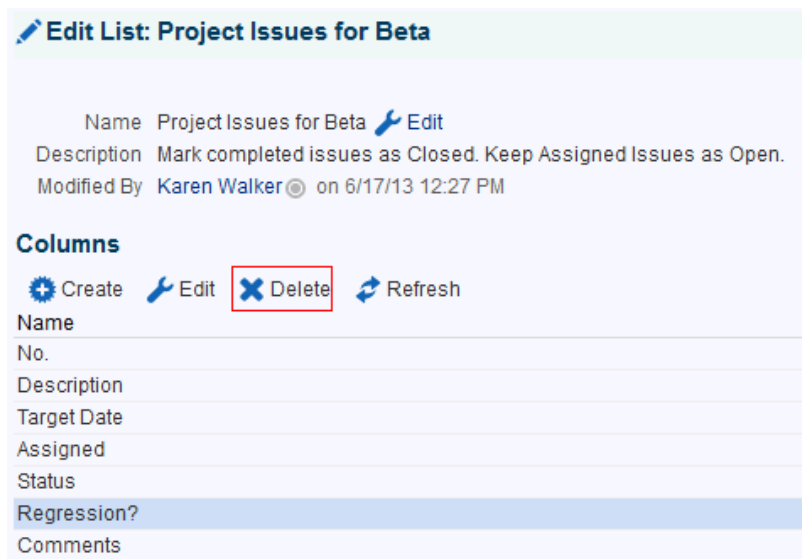
1. Go to the Lists page of the portal where you want to delete list columns.

See Also: For information about navigating to a Lists page, see [Section 31.2.1, "Viewing Lists."](#) If the Lists page is not exposed, you will not be able to delete columns in a list.

2. In the Lists panel, select the list you want to change and click the **Edit list** icon to open the list edit mode ([Figure 31–20](#)).

Figure 31–20 List in Edit List Mode

3. Select a column, and click the **Delete** button (Figure 31–21).

Figure 31–21 Delete Button on Edit List Page

4. In the resulting confirmation dialog, click the **Delete** button to complete the deletion.
5. Click the **Close** button to exit list edit mode.

31.2.2.3 Copying a List

You can use an existing list as a template simply by copying it. First, copy the list, and then edit the copied list.

To copy a list:

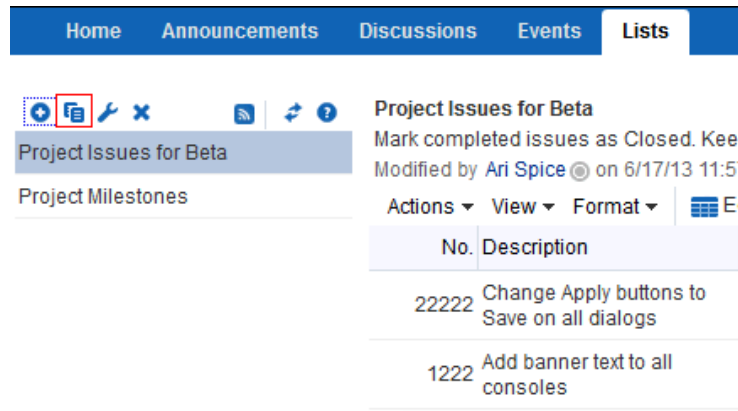
1. Go to the Lists page of the portal that contains the list you want to copy.

See Also: For information about navigating to a Lists page, see [Section 31.2.1, "Viewing Lists."](#)

You can copy a list if the Lists page is available. If your portal moderator has placed a list viewer on a page, you will not be able to copy a list.

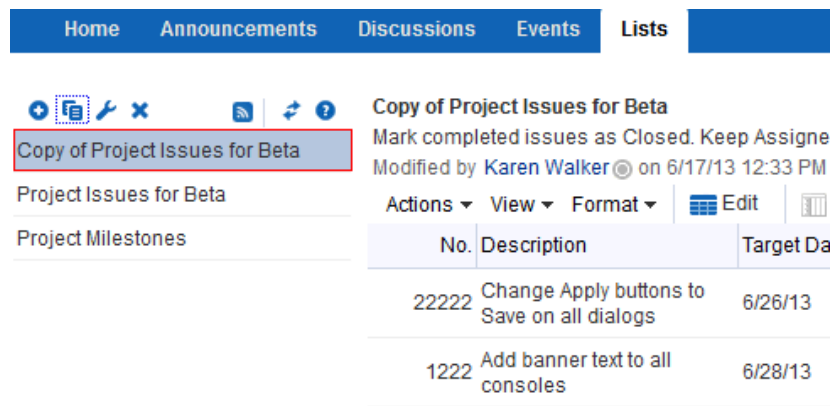
2. In the Lists panel, select the list you want to copy.
3. Click the **Copy List** icon ([Figure 31–22](#)).

Figure 31–22 Copy List Icon on the Lists Page (Console)



A copy of the list becomes available for selection in the Lists panel ([Figure 31–23](#)).

Figure 31–23 Copy of a List



4. Rename the list and edit the list structure.

For information about changing the list name or description, see [Section 31.2.2.1, "Renaming a List and Revising a List Description."](#) For information about revising list structure, see [Section 31.2.2.2, "Editing List Structure."](#)

31.2.2.4 Deleting Lists

To delete a list:

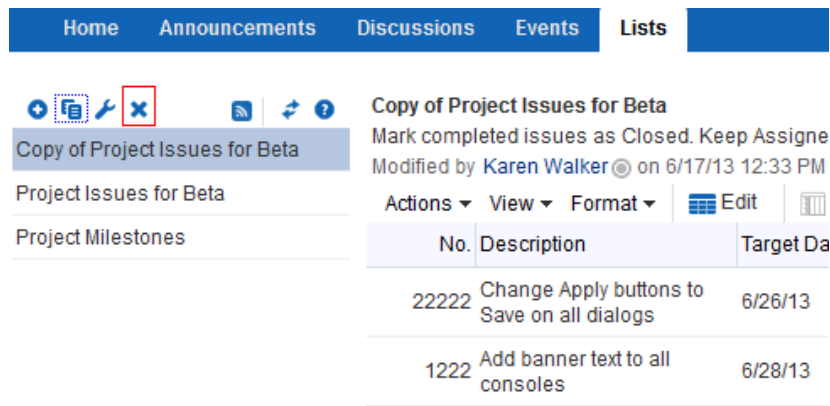
1. Go to the Lists page of the portal that contains the list you want to delete.

See Also: For information about navigating to a Lists page, see [Section 31.2.1, "Viewing Lists."](#)

You can delete a list if the Lists page is available. If your portal moderator has placed a list viewer on a page, you will not be able to delete a list.

2. In the Lists panel, select the list you want to delete.
To select multiple lists, press **Ctrl + Click**; to select a range of lists, press **Shift + Click**.
3. Click the **Delete list** icon ([Figure 31–24](#)).

Figure 31–24 Delete List Icon on the Lists Page (Console)



4. In the resulting confirmation dialog, click the **Delete** button.
After confirmation, the selected lists are removed from the Lists panel.

31.2.3 Adding and Managing List Data

After you have created a list structure, you and other users who have access can add data to the list. This section describes how to add, edit, and refresh list data, and how to delete lists rows. It includes the following topics:

- [Section 31.2.3.1, "Adding Data of a Given Data Type to a List"](#)
- [Section 31.2.3.2, "Editing List Data"](#)
- [Section 31.2.3.3, "Deleting List Rows"](#)
- [Section 31.2.3.4, "Refreshing List Data"](#)
- [Section 31.2.3.5, "Working with Links in Lists and List Rows"](#)

See Also: See [Section 31.2.2, "Creating and Managing Lists"](#) for more information about list structure. See [Table 31–1](#) and [Table 31–2](#) for more information about list data types.

31.2.3.1 Adding Data of a Given Data Type to a List

This section describes how to add data to a list. When you add data to a list, you do so row-by-row (unless you are importing a spreadsheet). The placement of a new row depends on the following considerations:

- When you add a new row, it is created after the selected row.

- If no row is selected, the new row is created as the first row.
- After you save, list data is refreshed and rows are shown in sort order.

See Also: for more information, see [Section 31.2.4.1, "Sorting List Data on a Column."](#)

You can add one or multiple list rows before you add content, or you can create a list row and add content to it right away.

This section provides an overview procedure for adding list data, and steps you through how to add data for the supported data type. It includes the following topics:

- [Section 31.2.3.1.1, "Adding Data to a List"](#)
- [Section 31.2.3.1.2, "Adding Plain Text Data to a List"](#)
- [Section 31.2.3.1.3, "Adding Rich Text Data to a List"](#)
- [Section 31.2.3.1.4, "Adding DateTime Data to a List"](#)
- [Section 31.2.3.1.5, "Adding Picture Data to a List"](#)
- [Section 31.2.3.1.6, "Adding Person Data to a List"](#)

Tip: The Number and Boolean data types are not included here because, for a Number data type, you simply enter a number, and, for a Boolean data type, you simply select or deselect a check box.

31.2.3.1.1 Adding Data to a List To add data to a list:

1. Go to the Lists page or the List viewer that displays the list you want to populate with data, and click the **Edit List Data** icon ([Figure 31–25](#)).

Figure 31–25 Edit List Data Icon

No.	Description	Target Date	Assigned	Status	Comments
22222	Change Apply buttons to Save on all dialogs	6/26/13	Wendy Devmore	Open	
1222	Add banner text to all consoles	6/28/13	Ari Spice	Open	
2315	Create first draft of beta plan	7/1/13	Chad Olsen	Open	

Tip: You can also enter list edit mode by selecting **Edit** from the **Actions** drop-down list or by pressing **Ctrl + E**.

The List Data appears in Edit mode ([Figure 31–26](#)).

Figure 31–26 List Data in Edit Mode

No.	Description	Target Date	Assigned	Status	Comments
22222	Change Apply buttons to	6/26/13	wendy	Open	
1222	Add banner text to all consoles	6/28/13	Ari Spice	Open	
2315	Create first draft of beta plan	7/1/13	Chad Olsen	Open	

- Click the **Add a New Row** button to add a row to the list (Figure 31–27).

Figure 31–27 Add A New Row Icon on a List

No.	Description	Target Date	Assigned	Status	Comments
22222	Change Apply buttons to	6/26/13	wendy	Open	
1222	Add banner text to all consoles	6/28/13	Ari Spice	Open	
2315	Create first draft of beta plan	7/1/13	Chad Olsen	Open	

Tip: You can also start the add-row process by selecting **Add Row** from the **Actions** drop-down list or by pressing **Ctrl + I**.

The new row is added after the selected row. If no row is selected, it is added as the first row (Figure 31–28).

Figure 31–28 A Newly Added Row

No.	Description	Target Date	Assigned	Status	Comments
				Open	
22222	Change Apply buttons to Save on all dialogs	6/26/13	Wendy Devmore	Open	
1222	Add banner text to all consoles	6/28/13	Ari Spice	Open	
2315	Create first draft of beta plan	7/1/13	Chad Olsen	Open	

- Add data to the new row.

Tip: You can only edit the row with focus. Click a row to give it focus and edit it.

- Repeat the steps to create new rows and add data.
- When you finish adding rows and data, click **Save** to save your changes and then click **Close** to exit edit list data mode.

Tip: To save, you can also select **Save** from the **Actions** drop-down list, or press **Ctrl+M**. To close, click **Close**, or select **Close** from the **Actions** drop-down list, or press **Ctrl+Q**.

When you save your changes, the list data is refreshed and the rows are rendered in sort order (for more information, see [Section 31.2.4.1, "Sorting List Data on a Column"](#)).

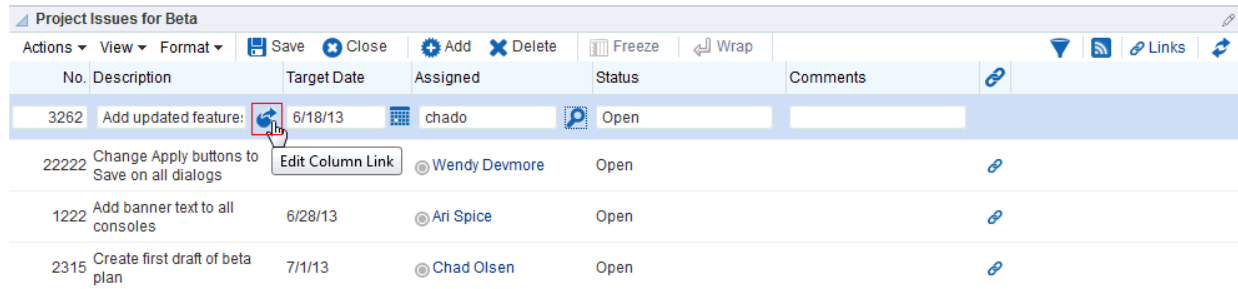
31.2.3.1.2 Adding Plain Text Data to a List The `Plain Text` data type allows for the entry of unformatted text, and provides options for making the text a link.

Tip: To create a hyperlink on a `Plain Text` data type, the list column must be configured to allow the creation of hyperlinks. For more information, see [Section 31.2.2.2.2, "Adding Columns to a List."](#)

To enter `Plain Text` data into a list row:

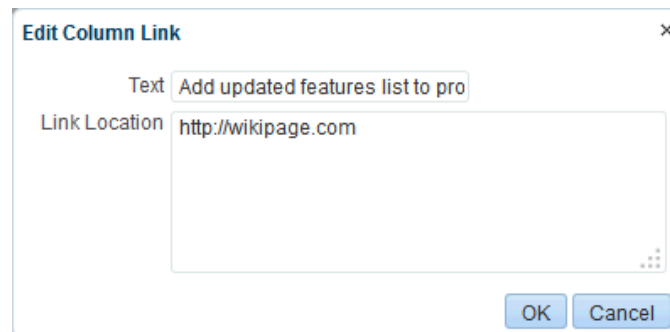
1. Open the edit list data mode (see [Section 31.2.3.1.1, "Adding Data to a List"](#)).
2. Go to the column row that is formatted to support the Plain Text data type:
 - To enter unlinked text, enter text in the field provided.
 - To enter linked text (**Allow Links** is selected in the Create/Edit Column dialog):
 - a. Click the **Edit Column Link** icon to the right of the data entry field ([Figure 31–29](#)).

Figure 31–29 Edit Column Link Icon



- b. In the resulting Edit Column Link dialog, enter text in the **Text** field, and enter a full URL in the **Link Location** field ([Figure 31–30](#)).

Figure 31–30 Edit Column Link Dialog



- c. Click **OK**.

Tip: To remove a link, click the **Edit Column Link** icon, and delete the URL from the resulting dialog.

3. When you finish adding rows and data, click **Save** to save your changes and click **Close** to exit the edit list data mode.

Tip: To save, you can also select **Save** from the **Actions** menu, or press **Ctrl+M**. To close, click **Close**, or select **Close** from the **Actions** drop-down list, or press **Ctrl+Q**.

If both text and a link location were specified, the text is rendered as a hyperlink ([Figure 31–31](#)).

Figure 31–31 A Plain Text Field with a Hyperlink

No.	Description	Target Date	Assigned	Status	Comments
22222	Change Apply buttons to Save on all dialogs	6/26/13	Wendy Devmore	Open	
1222	Add banner text to all consoles	6/28/13	Ari Spice	Open	
2315	Create first draft of beta plan	7/1/13	Chad Olsen	Open	
3262	Add updated features list to project portal	6/18/13	Chad Olsen	Open	

31.2.3.1.3 Adding Rich Text Data to a List The Rich Text data type allows for the entry of rich, formatted text through a rich text editor. Rich text may include links.

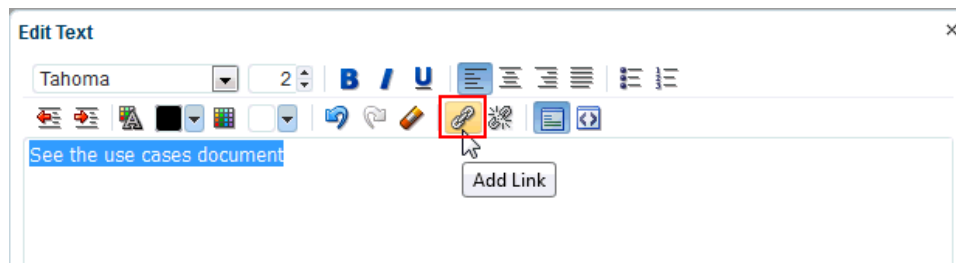
To enter Rich Text data into a list row:

1. Open the edit list data mode (see Section 31.2.3.1.1, "Adding Data to a List").
2. Go to the column that is formatted to support the Rich Text data type, and click the Edit Text icon to the right of the data entry field (Figure 31–32).

Figure 31–32 Edit Text Icon

No.	Description	Target Date	Assigned	Status	Comments
22222	Change Apply button	6/26/13	wendy	Open	
1222	Add banner text to all consoles	6/28/13	Ari Spice	Open	
2315	Create first draft of beta plan	7/1/13	Chad Olsen	Open	
3262	Add updated features list to project portal	6/18/13	Chad Olsen	Open	

3. Enter text and apply styles according to your requirements in the rich text editor (Figure 31–33).
4. To add a link:
 - a. Highlight the link text, and click the Add Link icon in the editor's toolbar (Figure 31–33).

Figure 31–33 Add Link through Rich Text Editor

- b. In the resulting dialog, enter a URL in the field provided.
- c. Click OK.

Tip: To remove a link, highlight the linked text and click the **Remove Link** icon.

5. Click **OK** to exit the editor.
6. When you finish adding rows and data, click **Save** to save your changes and click **Close** to exit edit list data mode.

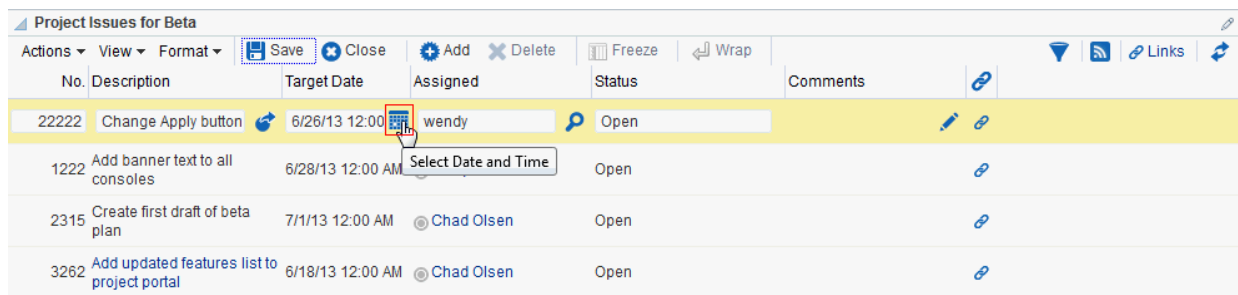
Tip: To save, you can also select **Save** from the **Actions** menu, or press **Ctrl+M**. To close, click **Close**, or select **Close** from the **Actions** drop-down list, or press **Ctrl+Q**.

31.2.3.1.4 Adding DateTime Data to a List The `DateTime` data type allows for the entry of dates and times in the format specified in a given user's WebCenter Portal Preferences (for more information, see [Section 5.3, "Setting Date and Time Preferences"](#)).

To enter `DateTime` data into a list row:

1. Open the edit list data mode (see [Section 31.2.3.1.1, "Adding Data to a List"](#)).
2. Go to the column that is formatted to support the `DateTime` data type, and enter a value or click the **Select <date-time data type>** icon to the right of the data entry field ([Figure 31–34](#)).

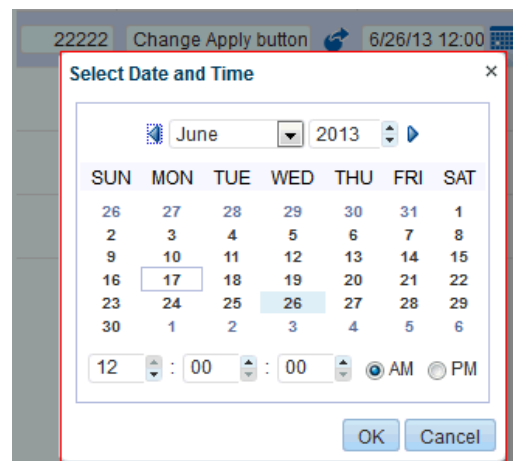
Figure 31–34 Select Date and Time Icon



No.	Description	Target Date	Assigned	Status	Comments
22222	Change Apply button	6/26/13 12:00	wendy	Open	
1222	Add banner text to all consoles	6/28/13 12:00 AM		Open	
2315	Create first draft of beta plan	7/1/13 12:00 AM	Chad Olsen	Open	
3262	Add updated features list to project portal	6/18/13 12:00 AM	Chad Olsen	Open	

3. If you click the icon, from the resulting calendar, select a date, a time, or a date and time, according to the column's requirements ([Figure 31–35](#)).

Figure 31–35 Date Time Picker



4. If the column requires just a date, the calendar closes after you select a value.
If the calendar requires a time or a date and time, click **OK** to close the calendar.
5. When you finish adding rows and data, click **Save** to save your changes and click **Close** to exit edit list data mode.

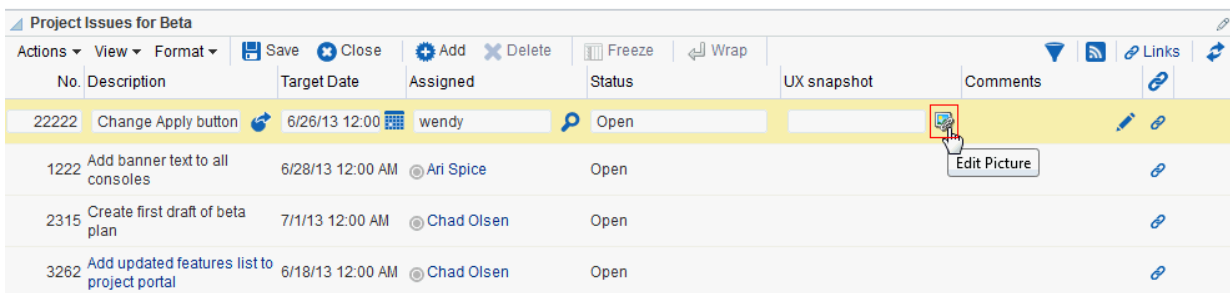
Tip: To save, you can also select **Save** from the **Actions** menu, or press **Ctrl+M**. To close, click **Close**, or select **Close** from the **Actions** drop-down list, or press **Ctrl+Q**.

31.2.3.1.5 Adding Picture Data to a List The **Picture** data type allows for the entry of a URL to an image (the image is rendered in list view mode).

To enter a **Picture** data type into a list row:

1. Open the edit list data mode (see [Section 31.2.3.1.1, "Adding Data to a List"](#)).
2. Go to the column that is formatted to support the **Picture** data type, and enter a URL to a picture or click the **Edit Picture** icon to the right of the data entry field ([Figure 31–36](#)).

Figure 31–36 Edit Picture Icon

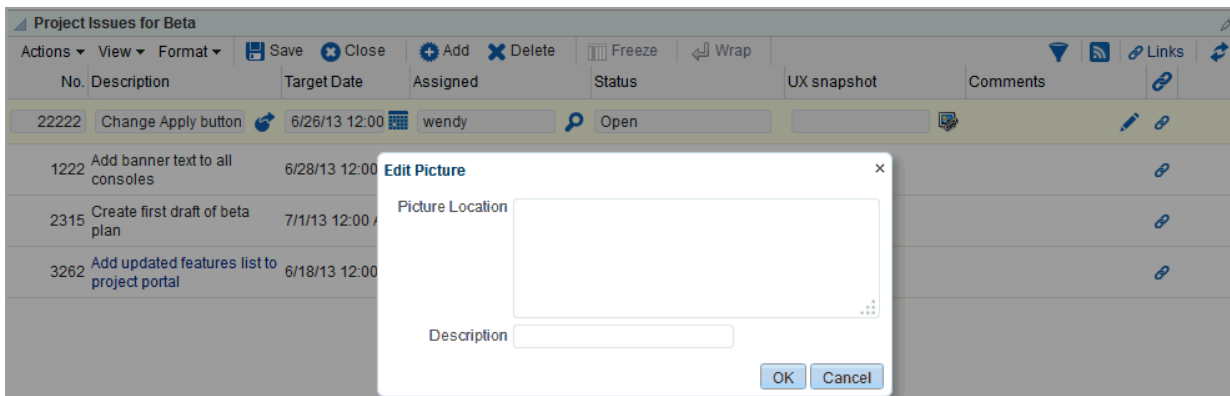


3. Click the icon and, in the **Edit Picture** dialog, enter the URL to an image in the **Picture Location** field ([Figure 31–37](#)).

For example, enter:

`http://www.oracleimg.com/admin/images/ocom/hp/oralogo_small.gif`

Figure 31–37 Edit Picture Dialog



Tip: The image must be available in a location that does not require login credentials for access.

You can select an image that is located in your WebCenter Portal Document Library. In the Documents view, select the image and use the **Get a Link** option on the **View** drop-down list to access a link to the image. Copy the link and paste it into the **Picture Location** field.

4. Provide ALT text for the image in the **Description** field.
5. Click **OK**.
6. When you finish adding rows and data, click **Save** to save your changes and click **Close** to exit the edit list data mode.

Tip: To save, you can also select **Save** from the **Actions** drop-down list, or press **Ctrl+M**. To close, click **Close**, or select **Close** from the **Actions** drop-down list, or press **Ctrl+Q**.

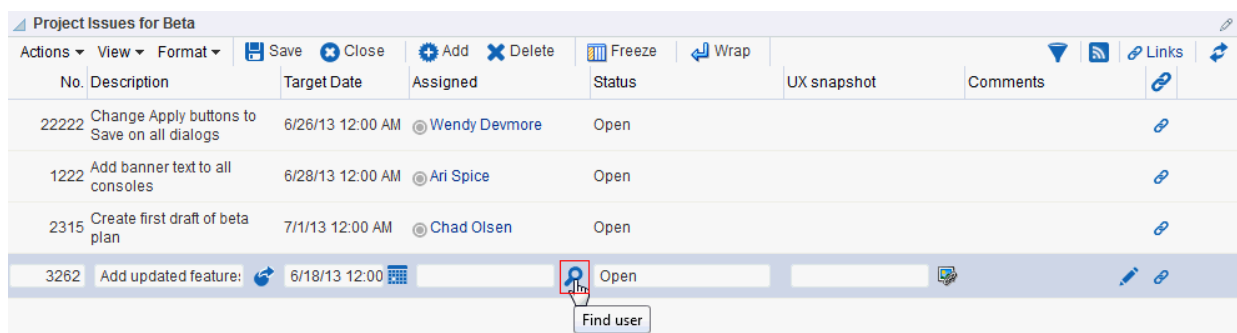
31.2.3.1.6 Adding Person Data to a List The **Person** data type allows for the entry of a user name from your company's identity store. The selection of a **Person** may be further limited to the members of the current portal. If you search for a user name, the values returned indicate whether such a limit is in place.

To enter a **Person** data type into a list row:

1. Open the edit list data mode (see [Section 31.2.3.1.1, "Adding Data to a List"](#)).
2. Go to the column that is formatted to support the **Person** data type, and enter a user name or click the **Find user** icon to the right of the data entry field ([Figure 31–38](#)).

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

Figure 31–38 Find User Icon



If you click the **Find user** icon, search for a user name in the **Search** field and then click the **Search** icon. Either all names in your company LDAP directory, or those users who belong to the current portal, that match your search criteria appear in the results area.

3. Select a user, and click **OK** to populate the field with your selection.
4. When you finish adding rows and data, click **Save** to save your changes and click **Close** to exit the edit list data mode.

Tip: To save, you can also select **Save** from the **Actions** drop-down list, or press Ctrl+M. To close, or click **Close**, select **Close** from the **Actions** drop-down list, or press Ctrl+Q.

31.2.3.2 Editing List Data

When a list is in edit mode, you can edit one or multiple list rows. In edit mode, you can initiate a row edit simply by clicking within the row. You can continue to click in rows and edit row content until you exit edit mode.

To edit list data:

1. Go to the list that contains data you want to edit, and click **Edit List Data** (Figure 31–39).

Figure 31–39 Edit List Data Icon

No.	Description	Target Date	Assigned	Status	Comments
22222	Change Apply buttons to Save on all dialogs	6/26/13	Wendy Devmore	Open	
1222	Add banner text to all consoles	6/28/13	Ari Spice	Open	
2315	Create first draft of beta plan	7/1/13	Chad Olsen	Open	

The selected list row opens in Edit mode (Figure 31–40).

Figure 31–40 Edit List Mode

No.	Description	Target Date	Assigned	Status	UX snapshot	Comments
22222	Change Apply button	6/26/13 12:00	wendy	Open		
1222	Add banner text to all consoles	6/28/13 12:00 AM	Ari Spice	Open		
2315	Create first draft of beta plan	7/1/13 12:00 AM	Chad Olsen	Open		
3262	Add updated features list to project portal	6/18/13 12:00 AM		Open		

2. Click any list row to revise its data (Figure 31–41).

Figure 31–41 A Selected Row for Edit

No.	Description	Target Date	Assigned	Status	UX snapshot	Comments
22222	Change Apply buttons to Save on all dialogs	6/26/13 12:00 AM	Wendy Devmore	Open		
1222	Add banner text to all consoles	6/28/13 12:00 AM	Ari Spice	Open		
2315	Create first draft of beta plan	7/1/13 12:00 AM	Chad Olsen	Open		
3262	Add updated feature:	6/18/13 12:00		Open		

Tip: The type of list data affects the action that you take:

- To edit a **Picture** data type, click the **Edit Picture** icon next to the data entry field. Enter the URL to the picture and ALT text.
- To edit a **Rich Text** data type, click the **Edit Text** icon next to the data entry field to launch the editor.
- To edit a hyperlink in a column that allows links, click the **Edit Link** icon.

3. Continue clicking rows and revising data until you are finished.
4. When you finish adding rows and data, click **Save** to save your changes and click **Close** to exit the edit list data mode.

Tip: To save, you can also select **Save** from the **Actions** drop-down list, or press **Ctrl+M**. To close, click **Close**, or select **Close** from the **Actions** drop-down list, or press **Ctrl+Q**.

31.2.3.3 Deleting List Rows

You can delete one or multiple list rows in one operation.

Tip: Selecting a row and clicking **Delete** marks a list row for deletion. The row is removed from your view, but the list data continues to exist in the WebCenter Portal's repository. The actual delete takes place when you save the change.

To delete one or multiple list rows:

1. Go to the list that contains the rows to delete.
2. Click the **Edit List Data** icon to open the list in edit mode (Figure 31-42).

Figure 31-42 Edit List Mode

No.	Description	Target Date	Assigned	Status	UX snapshot	Comments
22222	Change Apply button	6/26/13 12:00	wendy	Open		
1222	Add banner text to all consoles	6/28/13 12:00 AM	Ari Spice	Open		
2315	Create first draft of beta plan	7/1/13 12:00 AM	Chad Olsen	Open		
3262	Add updated features list to project portal	6/18/13 12:00 AM		Open		

3. Select one or more rows to delete.

In Windows, use **Ctrl+Click** to select multiple rows. In UNIX, simply click multiple rows. In both operating systems, use **Shift+Click** to select a range of rows.

4. Click **Delete** (Figure 31-43).

Figure 31–43 Delete Button For a Selected Row

No.	Description	Target Date	Assigned	Status	UX snapshot	Comments
22222	Change Apply button	6/26/13 12:00	wendy	Open		
1222	Add banner text to all consoles	6/28/13 12:00 AM	Ari Spice	Open		
2315	Create first draft of beta plan	7/1/13 12:00 AM	Chad Olsen	Open		
3262	Add updated features list to project portal	6/18/13 12:00 AM		Open		

The selected rows marked for deletion are removed from your view of the list.

5. Click **Save** to save your changes and click **Close** to exit the edit list mode.

Tip: To save, you can also select **Save** from the **Actions** drop-down list, or press Ctrl+M. To close, click **Close**, or select **Close** from the **Actions** drop-down list, or press Ctrl+Q.

31.2.3.4 Refreshing List Data

All lists come with a **Refresh List** icon, which you can click to refresh the display of list data (Figure 31–44).

Note: Do not click the Reload or Refresh button in your browser. Click the **Refresh List** icon to update your view.

Figure 31–44 Refresh List Icon

No.	Description	Target Date	Assigned	Status	UX snapshot	Comments
3262	Add updated features list to project portal	6/18/13 12:00 AM		Open		
22222	Change Apply buttons to Save on all dialogs	6/26/13 12:00 AM	Wendy Devmore	Open		
1222	Add banner text to all consoles	6/28/13 12:00 AM	Ari Spice	Open		
2315	Create first draft of beta plan	7/1/13 12:00 AM	Chad Olsen	Open		

31.2.3.5 Working with Links in Lists and List Rows

Links assist with setting up associations from one WebCenter Portal asset to another. For example, using links you can associate a project plan document with a list of project issues. When users access the list, they can also immediately access the project plan by clicking a link that appears on the list.

Links retain their originating location. For example, if you create a link on a list row, then that link appears only on that row, and not on all the other rows in the same list (Figure 31–45). Suppose you link to a project plan document from the list row that has an associated task, the link to that document appears only on that row's Links dialog. It does not display on the Links dialog associated with the other rows on the same list.

Figure 31–45 Links in a List and Rows

Project Issues for Beta						
No.	Description	Target Date	Assigned	Status	Comments	Links
1222	Add banner text to all consoles	6/28/13 12:00 AM	Ari Spice	Open		Link
2315	Create first draft of beta plan	7/1/13 12:00 AM	Chad Olsen	Open		Link Links for the list row
3262	Add updated features list to project portal	6/18/13 12:00 AM	Chad Olsen	Open		Link
22222	Change Apply buttons to Save on all dialogs	6/26/13 12:00 AM	Wendy Devmore	Open		Link

See [Chapter 32, "Linking Information in WebCenter Portal"](#) for more information about working with links.

31.2.4 Customizing Lists

You can perform user customizations on your own view of a list instance. The portal moderator can perform application customizations on a list instance, affecting everyone's view. User customizations involve changes made in page *view* mode; while application customizations involve changes made in page *edit* mode (that is, in Composer). Everyone can perform user customizations on their own view of a list, but page edit privileges are always required for application-level list customizations.

Note: User and application customizations apply to a list rendered in a List viewer. They do not apply to lists rendered on the **Lists** page.

A second instance of a list is not affected by the customizations you make to the first instance. For example, imagine that you have placed the *Issues* list on both the *Sales* page and the *What's New* page. If you sort the list by the *Number* column on the *Sales* page, the *Issues* list is not automatically sorted by *Number* on the *What's New* page.

While application customizations affect everyone's view of a list instance, user customizations are layered over them. For example, someone may perform an application customization on a list containing columns A, B, and C, so that column C is first in list column order (C, A, B). You can then perform a user customization on the list so that column A is first in list column order in your personal view of the same list instance (A, C, B).

Note: If the same property is set at both the application and user levels, the user value takes precedence in your own view. For application-level customizations, see the "Customizing Lists" section in *Building Portals with Oracle WebCenter Portal*.

This section describes various user-level customizations you can make to a list instance. It includes the following topics:

- [Section 31.2.4.1, "Sorting List Data on a Column"](#)
- [Section 31.2.4.2, "Resizing List Columns"](#)
- [Section 31.2.4.3, "Changing Column Order on a List Instance"](#)
- [Section 31.2.4.4, "Hiding and Showing List Columns"](#)
- [Section 31.2.4.5, "Freezing a Column Position"](#)

- [Section 31.2.4.6, "Wrapping Column Data"](#)
- [Section 31.2.4.7, "Applying Color Banding to List Rows"](#)
- [Section 31.2.4.8, "Filtering List Data"](#)

31.2.4.1 Sorting List Data on a Column

By default, list data is sorted by create date. You can control the sort order of list data by clicking sort icons in each column's header. You can perform an advanced sort using the **View** drop-down list options.

Sort list data in the List viewer. You can sort list data on the Lists page, but the sort does not persist. It will revert if you change lists or navigate away from the page.

Note: To sort list data on a column position in your view, perform the following actions in page view mode. To sort list data on a column for all users, the application specialist or portal moderator can perform the following actions in page edit mode (in Composer).

This section describes regular and advanced sorting. It includes the following topics:

- [Section 31.2.4.1.1, "Sorting List Data Using Column Icons"](#)
- [Section 31.2.4.1.2, "Performing an Advanced Sorting of List Data"](#)

Note: When WebCenter Portal is using an Oracle database, a click on a column header in the List View results in a linguistic sort order based on your locale. For non-Oracle databases, the sorting is based on the linguistic sorting specified in the database (collation in the case of SQL Server). This means when you connect to a WebCenter Portal instance in different languages, list rows are sorted according to the default collation of the database, regardless of the language your application is currently using.

31.2.4.1.1 Sorting List Data Using Column Icons To sort list data on a column using column icons:

1. Go to the list instance you want to change.
2. Go to the column you want to sort, and position your mouse over the column header.

Notice that the sort icons appear when your mouse is over the column header ([Figure 31-46](#)).

Figure 31-46 Sort Icons on a List Column

No.	Description	Target Date	Assigned	Status	UX snapshot	Comments
3262	Add updated features list to project portal	6/18/13 12:00 AM	Sort Descending	Open		
22222	Change Apply buttons to Save on all dialogs	6/26/13 12:00 AM	Wendy Devmore	Open		
1222	Add banner text to all consoles	6/28/13 12:00 AM	Ari Spice	Open		
2315	Create first draft of beta plan	7/1/13 12:00 AM	Chad Olsen	Open		

3. Click the **Sort Ascending** icon to sort the list in ascending order (1, 2, 3, a, b, c); or click the **Sort Descending** icon to sort the list in descending order (c, b, a, 3, 2, 1).

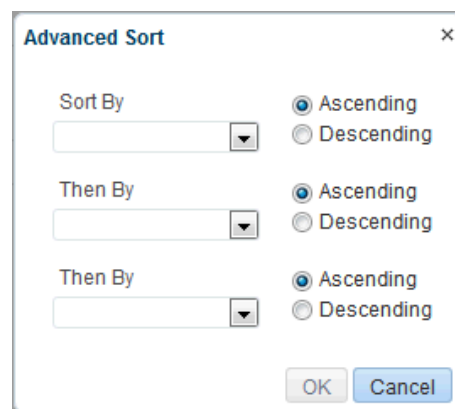
Tip: You can also sort list data on a column by selecting a column and then selecting **Sort** and then **Ascending** or **Descending** from the **View** drop-down list. You can right-click a column and select these options from a context menu.

31.2.4.1.2 Performing an Advanced Sorting of List Data The **View** drop-down list provides an **Advanced** option that provides another way to sort list data.

To use the Advanced option to sort list data:

1. Go to the list instance you want to change.
2. From the **View** drop-down list, select **Sort** and then select **Advanced** to open the Advanced Sort dialog (Figure 31-47).

Figure 31-47 Advanced Sort Dialog



3. From the **Sort By** list, select the column to be considered first in sorting list data. The **Sort By** and **Then By** fields are arranged in order of precedence, with **Sort By** considered first, and **Then By** in second and third positions.
4. Select either **Ascending**, to sort list data on the selected column in ascending order (1, 2, 3, a, b, c), or **Descending**, to sort list data on the selected column in descending order (c, b, a, 3, 2, 1).

Note: Currently, you can sort against only one column.

5. Click **OK**.

Tip: You can access the options described in this section by right-clicking a column header and selecting from a context menu.

31.2.4.2 Resizing List Columns

You can control the width of a list column by dragging it wider or by setting a specific column width through a dialog. You can also control column width by expressing a default width in column details (for more information, see the `Display Width` detail in Table 31-2).

Resize columns in the List viewer. You can resize columns on the Lists page, but these are not persisted and will revert when changing lists or navigating away.

Note: To resize list columns in your view, perform the following actions in page view mode. To resize list columns for all users, the application specialist or portal moderator can perform the following actions in page edit mode (in Composer).

To resize list columns:

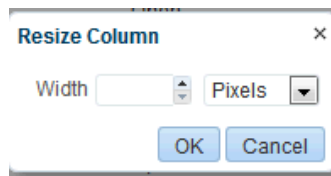
Note: To resize list columns, the list must contain at least one row.

1. Go to the list instance you want to change.
2. Resize columns using *one* of the following methods:
 - Click and hold on a column splitter, and drag it to make the column wider or narrower.
 - In the list, select the column to resize.

From the **Format** drop-down list, select **Resize Columns**.

In the Resize Column dialog, enter a column width and select a unit of measure (Figure 31–48).

Figure 31–48 *Resize Column Dialog*



Choose from the following options:

- **Pixels**—Express column width in a specified number of pixels.
- **Percent**—Express column width as a percentage of the total list width.

Tip: You can access the options described in the section by right-clicking a column and selecting from a context menu.

3. Click **OK**.

31.2.4.3 Changing Column Order on a List Instance

You can rearrange the order of list columns by dragging a column and dropping it to the desired position or by using the reorder dialog.

Note: To change column order on a list instance in your view, perform the following actions in page view mode. To change column order on a list instance for all users, the application specialist or portal moderator can perform the following actions in page edit mode.

To change column order:

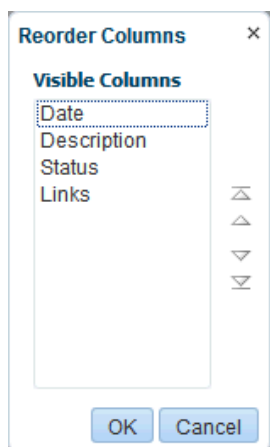
Note: To reorder columns by dragging, the list must have at least one row.

You can only change column order in the List viewer. You cannot change column order on the Lists page.

1. Go to the list instance you want to change.
2. Rearrange list columns using one of the following methods:
 - Click and hold a list column title, then drag and drop it to the desired location.
 - Select **Reorder Columns** from the **View** drop-down list.

In the Reorder Column dialog, select a column and click a **Move** icon to the right of the list of **Visible Columns** to reposition your selection (Figure 31–49).

Figure 31–49 Reorder Columns Dialog



Tip: You can access the options described in the section by right-clicking a column and selecting from a context menu.

3. Repeat until you have columns arranged in the desired order.
4. Click **OK**.

31.2.4.4 Hiding and Showing List Columns

You can use an option on a list's **View** drop-down list to hide selected list columns.

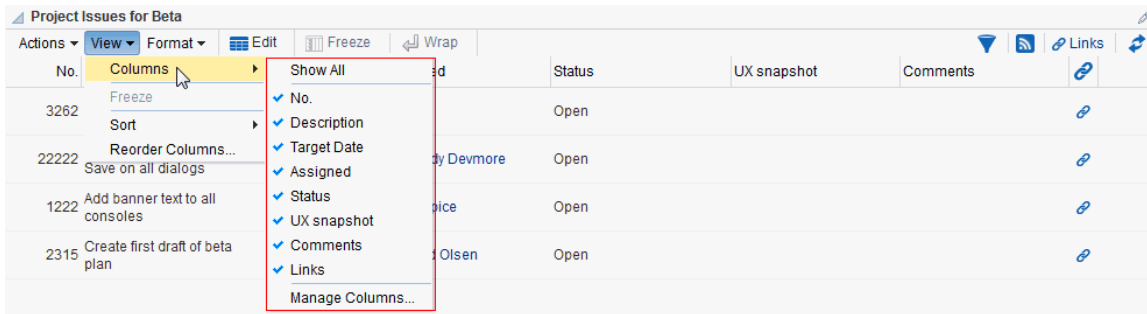
Note: To hide or show columns in your view, perform the following actions in page view mode. To hide or show columns for all users, the application specialist or portal moderator can perform the following actions in page edit mode.

Hide or show list columns in the List viewer. You can hide or show columns on the Lists page, but this setting does not persist and reverts when changing lists or navigating away.

To hide or show list columns:

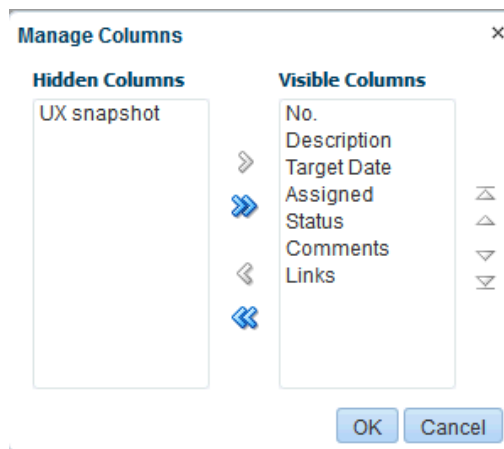
1. Go to the list instance you want to change.
2. From the **View** drop-down list, select **Columns** (Figure 31–50):

Figure 31–50 Columns Submenu from the View Drop-down List



- Select a column you want to show (a check mark appears on the menu next to shown columns).
- Deselect a column you want to hide (no check mark appears on the menu next to hidden columns).
- Select **Show All** to show all columns (all columns are selected on the menu).
- Select **Manage Columns** to open the Manage Column dialog (Figure 31–51). Select a column and use the arrow icon to move it appropriately. You can show or hide all columns by selecting the Move all or Remove all arrow icon.

Figure 31–51 Manage Columns Dialog



3. Click **OK**.

31.2.4.5 Freezing a Column Position

When a list is too wide to display all of its columns in one view, you can scroll the list left and right. If there is a column you always want to keep in view, you can use column freezing to hold a column in place during scrolling. Freezing causes a selected column to hold its position while the columns to the right of it scroll by. You can set **Freeze** on one column of a given list instance. Freezing holds in place the selected column and any column to the left of it.

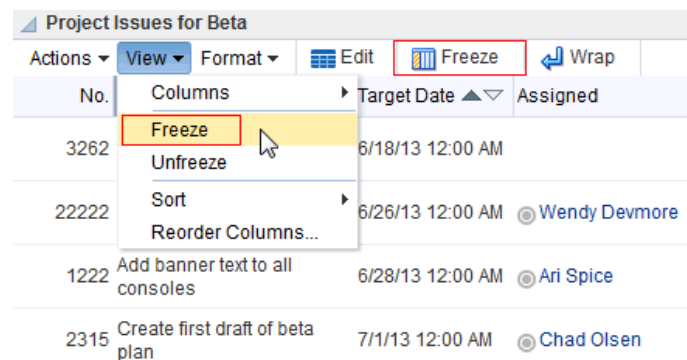
Note: To freeze a column position in your view, perform the following actions in page view mode. To freeze a column position for all users, the application specialist or portal moderator can perform the following actions in page edit mode.

To freeze a column position:

1. Go to the list with a column you want to freeze.
2. Select the relevant column by clicking its header.
The **Freeze** icon becomes available.
3. Click **Freeze** (Figure 31–52).

Tip: You can also freeze a column by selecting it and then selecting **Freeze** from the **View** menu.

Figure 31–52 Freeze Options



To unfreeze a column, select the column, and click the **Freeze** icon again or select **Unfreeze** from the **View** drop-down list.

Tip: You can access the options described in the section by right-clicking a column and selecting from a context menu.

31.2.4.6 Wrapping Column Data

Use the Wrap feature to control whether to allow column data to wrap in a selected list column. Data that wraps breaks onto additional lines if it would otherwise exceed the column width. Data that does not wrap, shows only as much data as fits into the current column width. You can, however, widen the column to view the data if you prefer (see Section 31.2.4.2, "Resizing List Columns").

Note: By default, column data is wrapped.

To wrap column data:

1. Go to the list in which to wrap column data.
2. Select the relevant column by clicking its header.
3. Click **Wrap**.

Toggle the Wrap icon or the Wrap menu item to wrap text or turn the text wrap off.

Tip: You can also wrap data by selecting the column and then selecting **Wrap** from the **Format** drop-down list.

You can access the options described in the section by right-clicking a column and selecting from a context menu.

If any data was previously truncated, it now appears in the row with line breaks to accommodate the column's width.

To turn wrapping off, select the relevant column and click the **Wrap** icon again or select Wrap from the Format drop-down list.

31.2.4.7 Applying Color Banding to List Rows

Color banding refers to a transparent overlay of color applied at specified intervals to list rows or columns. When you define color banding on a list, you specify whether to apply color banding and how often to apply it.

You can easily enhance the readability of a list by applying row or column color banding.

You can apply color banding to your personal view of a list instance or to everyone's view of a list instance. To apply color banding for all users, the application specialist or portal moderator has to perform the task in page edit mode.

Note: You can only apply color banding in the List viewer. You cannot apply color banding on the Lists page.

This section contains the following topics:

- [Section 31.2.4.7.1, "Applying Color Banding to Your Personal View of a List"](#)
- [Section 31.2.4.7.2, "Removing Personal Color Banding"](#)

31.2.4.7.1 Applying Color Banding to Your Personal View of a List You can apply color banding to list rows or to list columns.

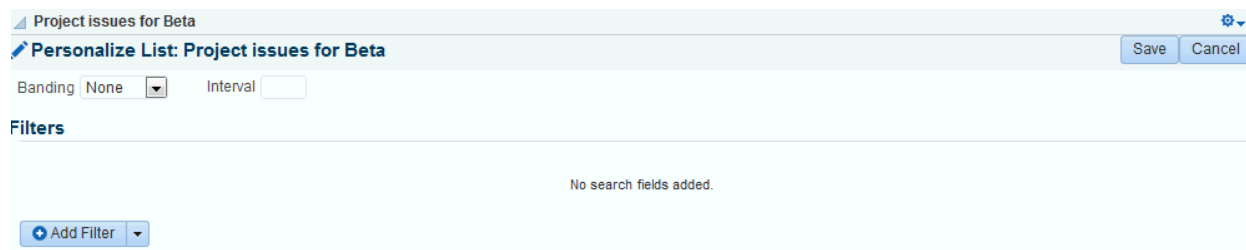
To apply color banding to your personal view of a list instance:

1. Go to the list you want to change.
2. Click the **Personalize** icon on the header ([Figure 31-53](#)).

Figure 31-53 Personalize Icon

No.	Description	Target Date	Assigned	Status	Comments
22222	Change Apply buttons to Save on all dialogs	6/26/13	Wendy Devmore	Open	
1222	Add banner text to all consoles	6/28/13	Ari Spice	Open	
2315	Create first draft of beta plan	7/1/13	Chad Olsen	Open	

The Personalize List panel is displayed ([Figure 31-54](#)).

Figure 31–54 List in Personalize List Mode

3. From the **Banding** drop-down list, select a banding style for the list instance.
Choose from:
 - **Row**—To specify color banding on list rows.
 - **Column**—To specify color banding on list columns.
 - **None**—To turn color banding off.
4. In the **Interval** field, enter the number of rows or columns in which color bands should not appear.
For example, when you apply color bands to rows, a value of 1 applies a color band to the second row, fourth row, sixth row, and so on.
5. Click **Save** to save your settings and return to the list.
List data is refreshed, now reflecting your color banding settings.

31.2.4.7.2 Removing Personal Color Banding To remove personal color banding from a list:

1. Go to the list from which to remove color banding.
2. Click the **Personalize** icon on the header (Figure 31–53).
The Personalize List panel is displayed (Figure 31–54).
3. From the **Banding** drop-down list, select **None**.
4. Click **Save** to save your settings and return to the list.
List data is refreshed, now showing no color banding.

31.2.4.8 Filtering List Data

Lists provide data filtering options for your personal view of a list instance and for everyone's view of the instance. Filtering provides a means of limiting the display of list data to those rows that match your filtering criteria.

Temporary, personal filtering (also called *ad hoc filtering*) is available with both the List viewer and Lists page. Custom filtering that affects everyone's view of a list instance is available only with the List viewer.

This section describes the processes of applying ad hoc, permanent personal, and permanent list filters. It contains the following topics:

- [Section 31.2.4.8.1, "Applying an Ad Hoc Filter to a List Instance"](#)
- [Section 31.2.4.8.2, "Applying a Permanent, Personal Filter to a List Instance"](#)
- [Section 31.2.4.8.3, "Removing a Permanent, Personal List Filter"](#)

31.2.4.8.1 Applying an Ad Hoc Filter to a List Instance Use *ad hoc* list filtering to easily find a particular list entry or group of entries in a list instance.

Note: *Ad hoc* list filtering applies only to Plain Text and Person data types. Columns that use other data types, such as Date and Number, are not used in *ad hoc* filtering. For example, if you have dates shown in format *dd-mon-yy* and you filter on *jan*, you do not see rows with dates in January.

To apply an *ad hoc* filter to a list instance:

1. Go to the list that contains the data you want to temporarily filter.
2. Click the **Filter Rows** icon in the List toolbar (Figure 31–55).

Figure 31–55 Filter Rows Icon

The screenshot shows a list instance titled "Project Issues for Beta". The toolbar includes icons for Actions, View, Format, Edit, Freeze, Wrap, and Filter Rows (a funnel icon). A tooltip labeled "Filter Rows" is visible over the funnel icon. The list contains four rows with columns: No., Description, Target Date, Assigned, Status, and Comments.

No.	Description	Target Date	Assigned	Status	Comments
3262	Add updated features list to project portal	6/18/13 12:00 AM	Chad Olsen	Open	
22222	Change Apply buttons to Save on all dialogs	6/26/13 12:00 AM	Wendy Devmore	Open	
1222	Add banner text to all consoles	6/28/13 12:00 AM	Ari Spice	Open	
2315	Create first draft of beta plan	7/1/13 12:00 AM	Chad Olsen	Open	

Tip: You can also select **Filter Rows** from the **Actions** menu.

The **Filter** field displays (Figure 31–56).

Figure 31–56 Filter Field

The screenshot shows the same list instance as Figure 31–55, but with the Filter field visible in the toolbar. The field is labeled "Filter" and has a search icon on the right. The list data is the same as in Figure 31–55.

No.	Description	Target Date	Assigned	Status	Comments
3262	Add updated features list to project portal	6/18/13 12:00 AM	Chad Olsen	Open	
22222	Change Apply buttons to Save on all dialogs	6/26/13 12:00 AM	Wendy Devmore	Open	
1222	Add banner text to all consoles	6/28/13 12:00 AM	Ari Spice	Open	
2315	Create first draft of beta plan	7/1/13 12:00 AM	Chad Olsen	Open	

3. Enter space-separated keywords in the **Filter** field, and click the **Filter** icon to execute the filter.

All row details that match any of the keywords are shown.

4. Click the **Filter Rows** icon again to hide the **Filter** field and remove the temporary filter.

Tip: You can also select **Cancel Filter** from the **Actions** drop-down list.

31.2.4.8.2 Applying a Permanent, Personal Filter to a List Instance In addition to an *ad hoc* filter, you can apply a permanent personal filter to your view of a list instance. The term *permanent* is used to convey that you can keep your list filtered in a particular way for as long as you like. The filter is retained across page navigations within a browser session and across browser sessions.

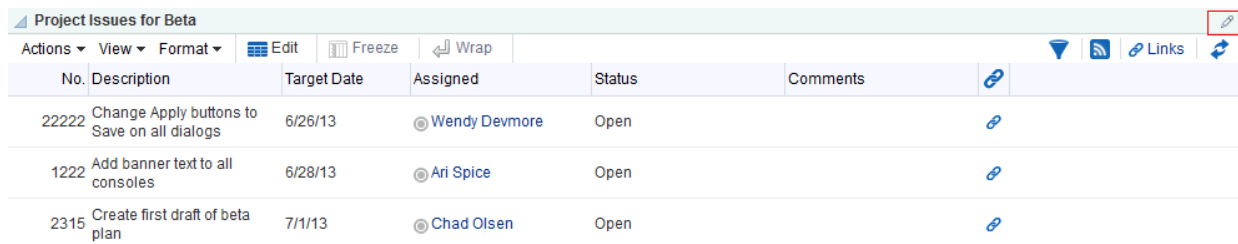
It is still possible to remove such a filter. This section describes how to apply and remove a permanent personal filter.

To apply or remove a permanent filter on your view of a list instance:

1. Go to the list that contains the data you want to permanently filter.
2. Click the **Personalize** icon on the header (Figure 31–57).

Note: The Personalize icon is available on a List viewer on a page. It is not available on a List viewer on the Lists page.

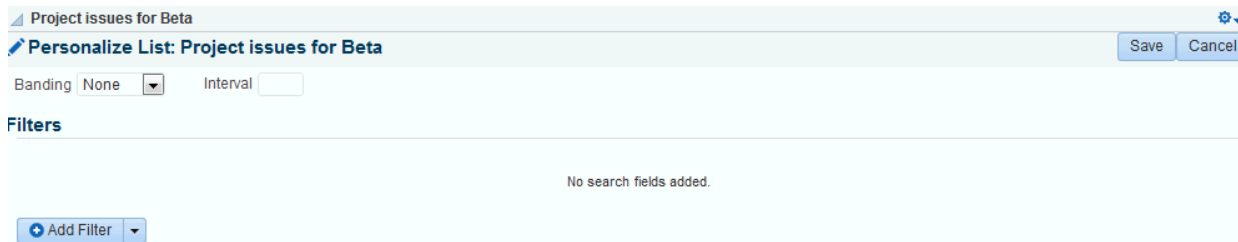
Figure 31–57 Personalize Icon



No.	Description	Target Date	Assigned	Status	Comments	
22222	Change Apply buttons to Save on all dialogs	6/26/13	Wendy Devmore	Open		
1222	Add banner text to all consoles	6/28/13	Ari Spice	Open		
2315	Create first draft of beta plan	7/1/13	Chad Olsen	Open		

The Personalize List panel is displayed (Figure 31–58).

Figure 31–58 List in Personalize List Mode



Project issues for Beta

Personalize List: Project issues for Beta Save Cancel

Banding: None Interval:

Filters

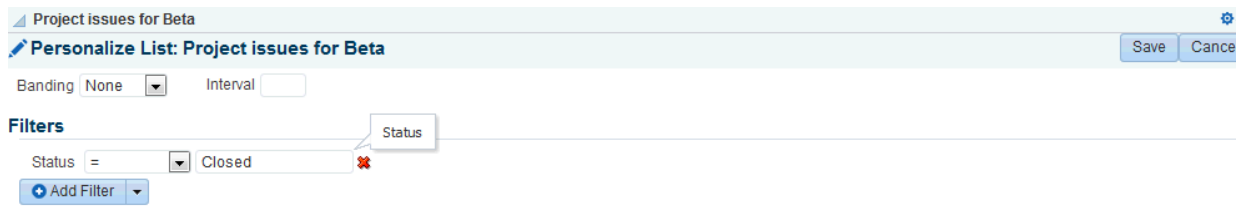
No search fields added.

Add Filter

3. From the **Add Filter** drop-down list, select a column against which to apply a filter.

The selected column name appears in the Filters section.

4. Select an operator from the list, and enter the filter value in the field provided (Figure 31–59).

Figure 31–59 Filter Operator and Value

The filter operators that appear on the list vary according to the data type of the selected column. [Table 31–3](#) lists and describes filter operators as they apply to different data types.

Table 31–3 Filter Operators for List Data Types

Data Type	Description
Boolean	<p>Use Boolean data type filter operators to specify that Boolean values in the selected list column must:</p> <ul style="list-style-type: none"> ▪ = —Match the value you specify ▪ <>—Not match the value you specify <p>The Boolean value is expressed as a check box. A selected box means TRUE or YES; a deselected box means FALSE or NO.</p>
DateTime	<p>Use DateTime data type filter operators to specify that date and time values in the selected column must be:</p> <ul style="list-style-type: none"> ▪ = —The same as the date or date and time that you specify ▪ >= —More recent or the same as the date or date and time that you specify ▪ <>—Any date or date and time other than the value you specify ▪ >—More recent than the date or date and time that you specify ▪ <= —Preceding or matching the date or date and time that you specify ▪ <—Preceding the date or date and time that you specify
Number	<p>Use Number data type filter operators to specify that number values in the selected column must be:</p> <ul style="list-style-type: none"> ▪ = —Equal to the value you specify ▪ >= —Equal to or greater than the value you specify ▪ <>—Greater or lesser than the value you specify ▪ >—Greater than the value you specify ▪ <= —Equal to or lesser than the value you specify ▪ <—Lesser than the value you specify
Person	<p>Use Person data type filter operators to specify that person values in the selected list column must:</p> <ul style="list-style-type: none"> ▪ = —Match the user name you specify ▪ Starts With—Start with the character(s) you specify ▪ Ends With—End with the character(s) you specify ▪ Contains—Include the character(s) you specify ▪ <>—Contain any user name other than the one you specify

Table 31–3 (Cont.) Filter Operators for List Data Types

Data Type	Description
Picture	You cannot apply filter operators to a <code>Picture</code> data type in a list.
Plain Text	Use <code>Plain Text</code> data type filter operators to specify that values in the selected column must: <ul style="list-style-type: none"> ■ = —Match the characters you specify ■ Starts With—Start with the character(s) you specify ■ Contains—Include the character(s) you specify ■ Ends With—End with the character(s) you specify ■ <>—Contain any value other than the one you specify
Rich Text	You cannot apply filter operators to a <code>Rich Text</code> data type in a list.

5. When you define multiple filters, **Match All Any** options appear:
 - Select **All** to require that displayed rows match all conditions.
 - Select **Any** to require that displayed rows match at least one condition.

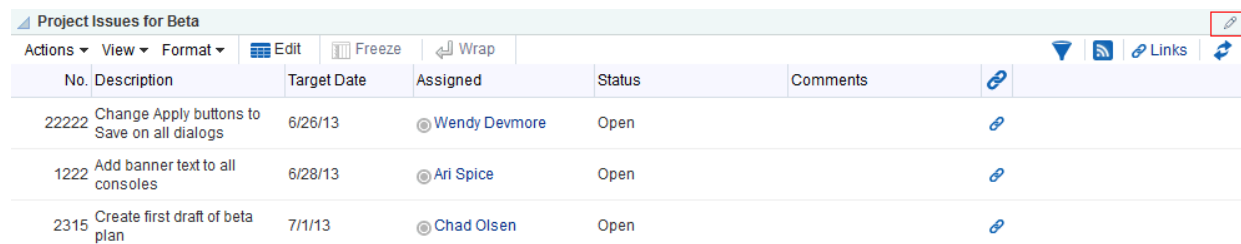
6. Click **Save** to save your filter criteria and return to the list.

The list is refreshed, now displaying data that matches your filter criteria.

31.2.4.8.3 Removing a Permanent, Personal List Filter To remove a permanent, personal list filter:

1. Go to the list from which you want to remove personal filtering.
2. Click the **Personalize** icon on the Lists toolbar (Figure 31–60).

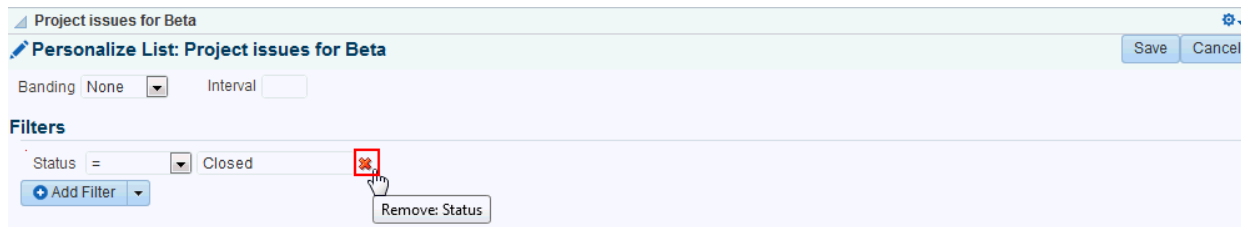
Note: The Personalize icon is available on a List viewer on a page. It is not available on a List viewer on the Lists page.

Figure 31–60 Personalize Icon


No.	Description	Target Date	Assigned	Status	Comments	
22222	Change Apply buttons to Save on all dialogs	6/26/13	Wendy Devmore	Open		
1222	Add banner text to all consoles	6/28/13	Ari Spice	Open		
2315	Create first draft of beta plan	7/1/13	Chad Olsen	Open		

The Personalize List panel is displayed.

3. Click the **Remove** icon next to the filtering criteria you want to remove (Figure 31–61).

Figure 31–61 Remove Icon on a Filter

4. Click **Save**.

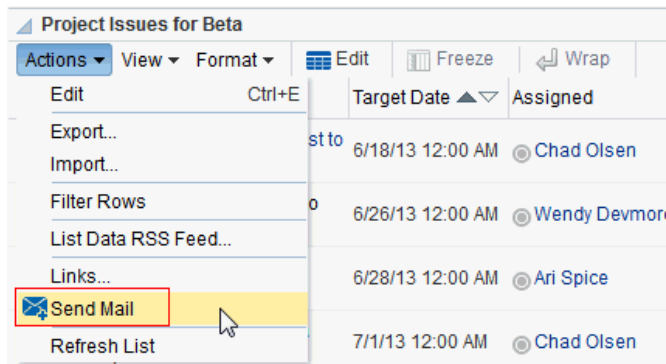
The list data is refreshed, displaying data previously hidden by a filter.

31.2.5 Sending a Link to a List to Other Users

The list **Actions** drop-down list includes a **Send Mail** option for sending a link to a list through a mail message.

To send a link to a list through mail:

1. Go to the list instance you want to send as a link through mail.
2. From the list **Actions** drop-down list, select **Send Mail** (Figure 31–62).

Figure 31–62 Send Mail Option on Actions Drop-down List

A compose message window opens, addressed to portal members, with the following information:

- The name of the portal from which the list instance originates
- The list title and description
- A link to the portal
- A link to the list instance

Users click the link to the list instance to open a view of the list.

Note: To view the list, users must have access to the portal that contains the list instance.

3. Compose the message and send as you would any other mail message.

See [Section 13.4, "Working with Mail"](#) for more information.

31.2.6 Exporting a List and Importing a List from an Excel Spreadsheet

You can export and import lists. If you can view the list, you can export it to Microsoft Excel 1997 - 2003 and 2007 formats and revise list data in Excel. If you have sufficient privileges to edit the list, you can import the revised list back into WebCenter Portal.

Tip: You can also create a list by importing an Excel spreadsheet. See [Section 31.2.2.1, "Creating Lists"](#) for more information.

The following sections in *Building Portals with Oracle WebCenter Portal* describe how to export and import lists and provides information about additional software that may be of use in this process:

- "About Exporting and Importing Lists"
- "Exporting a List to a Spreadsheet"
- "Importing an Exported List"

Linking Information in WebCenter Portal

This chapter describes how to use the links feature. Links provide a way to view, access, and create associations between different assets where links are available.

This chapter includes the following topics:

- [Section 32.1, "About Links"](#)
- [Section 32.2, "Working with Links Features"](#)

Permissions: This chapter is intended for WebCenter Portal users who want to view, create, and manage links.

Such users must be granted, minimally, the portal-level permission `View Pages and Content` to view links. They can view shared links only for assets for which they have `view` permission.

Authenticated users who plan to create and manage links require the portal-level permission `Customize Pages and Edit Content`. They must have `view` permission on the resource. These permissions are granted by default to the portal `Participant` role. However, you might not be able to do some tasks if *one* or more of the following advanced permissions for links have been set:

- `Create and Delete Links`
- `Create Links`
- `View Links`

To associate links with other assets, such as announcements, discussions, documents, events, you must have the required permissions for those assets. See the "Managing Roles and Permissions for a Portal" chapter in *Building Portals with Oracle WebCenter Portal*.

32.1 About Links

Linking gives users a means of explicitly associating two assets with each other through easy-access reference points, called *links*. Links assist with setting up these associations from one WebCenter Portal asset to another. For example, using links you can associate a project plan document with a list of project issues. When users access the list, they can also immediately access the project plan by clicking a link that appears on the list ([Figure 32-1](#)). Links also provide a quick way to create new assets while establishing a link at the same time.

Figure 32–1 A Link in a List Row

The screenshot shows a table titled "Project Issues for Beta" with columns: No., Description, Target Date, Assigned, Status, and Comments. The table contains four rows of issues. The third row, with ID 2315 and description "Create first draft of beta plan", has a gold link icon in the Comments column, which is highlighted with a red rectangular box. The other rows have blue link icons. Above the table, there are navigation icons and a "Links" icon with a gold circle around it.

No.	Description	Target Date	Assigned	Status	Comments
22222	Change Apply buttons to Save on all dialogs	6/26/13 12:00 AM	Wendy Devmore	Open	
1222	Add banner text to all consoles	6/28/13 12:00 AM	Ari Spice	Open	
2315	Create first draft of beta plan	7/1/13 12:00 AM	Chad Olsen	Open	
3262	Add updated features list to project portal	6/18/13 12:00 AM	Chad Olsen	Open	

Links are scoped to portals. For example, the links that display in the *Finance* portal differ from the links that display in the *Infrastructure* portal, even though links are accessed from the same places in both portals. The assets to which you can link also depend on the following:

- The tools that have been enabled in your portal. For more information, see the "Enabling and Disabling Tools and Services Available to a Portal" section in *Building Portals with Oracle WebCenter Portal*.
- The tools for which you have permissions. See the "About Roles and Permissions for a Portal" section in *Building Portals with Oracle WebCenter Portal*.

Anywhere you see a **Links** icon, you can create a link to both new and existing assets.

There are two **Links** icons that each indicate the state of the Links dialog:

- The empty **Links** icon (Figure 32–2) indicates that no links are present in the Links dialog.

Figure 32–2 Links Icon (No Links Present)



- The gold **Links** icon (Figure 32–3) indicates that links are present in the Links dialog.

Figure 32–3 Links Icon (Links Present)



Use the **Link to Existing** option in the Links dialog to link to existing WebCenter Portal assets, such as documents, discussion forum topics, and announcements. See [Section 32.2.1, "Linking to Existing Assets"](#) for more information.

Use the **Link to New** option in the Links dialog to both create a WebCenter Portal asset and link to it in a single operation. Select **Link to New** to upload and link to documents, create and link to discussion forum topics, enter the URL of a web page to link to, and create and link to other types of assets. See [Section 32.2.2, "Linking to New Assets"](#) for more information.

You can create links from announcements, discussions, documents, events, lists, and notes.

The items you can link to differ between the **Link to New** and **Link to Existing** lists. For example, while you can link to a new note, you cannot link to an existing note. Additionally, the items you can link to from a Home portal differ from those you can link to from a portal. [Table 32–1](#) lists the types of assets you can link to and from.

Table 32–1 Linking to Assets

Asset Type	Link to New	Link to Existing	Home Portal	Portal
Announcement	No	Yes	No	Yes
Discussion Topic	Yes	Yes	No	Yes
Document/Wiki	Yes	Yes	Yes	Yes
Event	Yes	Yes	No	Yes
Note	Yes	No	Yes	Yes
URL	Yes	No	Yes	Yes

Given the right permissions, other users can see your links, and you can see the links of other users. What you can do with a link (such as view, create, delete) depends on your advanced permissions for Links. However, with notes, you can delete a link only if you also have delete permission for Notes.

What you can do with the *linked asset* is handled by the target asset's security and your permissions to work with these assets.

Links retain their originating location. For example, if you create a link on a list row, then that link appears only on that row, and not on all the other rows in the same list ([Figure 32–4](#)). Suppose you link to a project plan document from the list row that has an associated task, the link to that document appears only on that row's Links dialog ([Figure 32–4](#)). It does not display on the Links dialog associated with the other rows on the same list.

Figure 32–4 Links in a List and Rows

The screenshot shows a table titled "Project Issues for Beta" with columns: No., Description, Target Date, Assigned, Status, and Comments. There are four rows of data. A "Links" dialog box is open over the second row (No. 2315, "Create first draft of beta plan"). The dialog box has a "Links for the entire list" button and a "Links for the list row" button. The "Links for the list row" button is highlighted with a red box.

No.	Description	Target Date	Assigned	Status	Comments
1222	Add banner text to all consoles	6/28/13 12:00 AM	Ari Spice	Open	
2315	Create first draft of beta plan	7/1/13 12:00 AM	Chad Olsen	Open	
3262	Add updated features list to project portal	6/18/13 12:00 AM	Chad Olsen	Open	
22222	Change Apply buttons to Save on all dialogs	6/26/13 12:00 AM	Wendy Devmore	Open	

Most links are also bidirectional. That is, when you create a link from a discussion to a document, a return link from the document to the discussion is automatically created. This bidirectional relationship holds for most, though not all, links. Links on notes, URLs, and list rows do not create a reciprocal link on the link target. For example, if you create a link from a document to a note, from a document to a URL, or from a list row to a document, then a reciprocal link is not created on the link target. However, a link from an entire list (rather than an individual list row) does create a reciprocal link from the target.

32.2 Working with Links Features

Many WebCenter Portal features include a linking capability that enables you to associate assets in WebCenter Portal, and with internal and external web pages. For example, the **Lists** page (or console) has its own link (Figure 32–5), and within lists, there are **Links** icon on each list and on each list row.

Figure 32–5 Link Icons on the Lists Page

No.	Description	Target Date	Assigned	Status	Comments
1222	Add banner text to all consoles	6/28/13 12:00 AM	Ari Spice	Open	
2315	Create first draft of beta plan	7/1/13 12:00 AM	Chad Olsen	Open	
3262	Add updated features list to project portal	6/18/13 12:00 AM	Chad Olsen	Open	
22222	Change Apply buttons to Save on all dialogs	6/26/13 12:00 AM	Wendy Devmore	Open	

You can link relevant documents, discussions, notes, web pages, events, and announcements. When viewing the details of an event, you can link to the event's agenda. In a list of project assignments, you can link to the functional and design specifications relevant to each assignment. In a discussion forum, you can link to a related discussion, document, web page, or WebCenter Portal page.

This section describes how to link one asset to another and how to access those links. It includes the following topics:

- [Section 32.2.1, "Linking to Existing Assets"](#)
- [Section 32.2.2, "Linking to New Assets"](#)
- [Section 32.2.3, "Accessing Link Targets"](#)
- [Section 32.2.4, "Deleting a Link"](#)
- [Section 32.2.5, "Linking in the Rich Text Editor"](#)

32.2.1 Linking to Existing Assets

This section describes how to use the **Link to Existing** option on the Links dialog to link to announcements, discussion forum topics, documents, and events currently available in your portal.

This section includes the following topics:

- [Section 32.2.1.1, "Opening the Links Dialog to Link to Existing Assets"](#)
- [Section 32.2.1.2, "Linking to an Existing Announcement"](#)
- [Section 32.2.1.3, "Linking to an Existing Discussion Forum Topic"](#)
- [Section 32.2.1.4, "Linking to an Existing Document"](#)
- [Section 32.2.1.5, "Linking to an Existing Event"](#)

32.2.1.1 Opening the Links Dialog to Link to Existing Assets

To create a link to an existing asset, first go to the asset from which you want to link and open the Links dialog by clicking the Links icon. From there, the steps vary depending on the type of asset you are linking to.

To open the Links dialog:

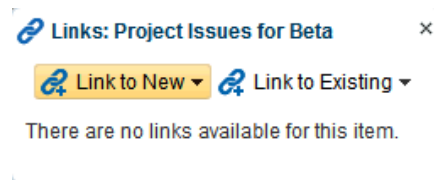
1. Go to the asset from which you want to link.
2. Click the asset's (or row's) associated **Links** icon (Figure 32–6).

Figure 32–6 Links Icon



The Links dialog (Figure 32–7) opens.

Figure 32–7 Links Dialog



3. From the Links dialog, select **Link to Existing** and then select the type of asset you want to link to.

Note: The assets that are available depend on your permissions and the tools or services that are enabled. For example, if you do not have the required permissions to work with announcements or announcements are not enabled, you will not see the Announcement option. For more information, see the "Enabling and Disabling Tools and Services Available to a Portal" section in *Building Portals with Oracle WebCenter Portal*.

For information about how to link to existing assets, see the following sections:

- [Section 32.2.1.2, "Linking to an Existing Announcement"](#)
- [Section 32.2.1.3, "Linking to an Existing Discussion Forum Topic"](#)
- [Section 32.2.1.4, "Linking to an Existing Document"](#)
- [Section 32.2.1.5, "Linking to an Existing Event"](#)

Note: In the following procedures, Lists is used as an example of an asset from which links to existing assets are created.

32.2.1.2 Linking to an Existing Announcement

You can bring timely announcements to the most viewed areas in your portal by linking to them.

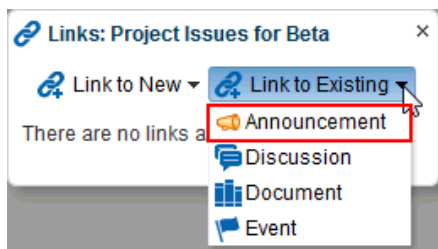
To link to an existing announcement:

1. Go to the asset from which you want to link to an announcement and click the **Links** icon.

See [Section 32.2.1.1, "Opening the Links Dialog to Link to Existing Assets"](#) for more information.

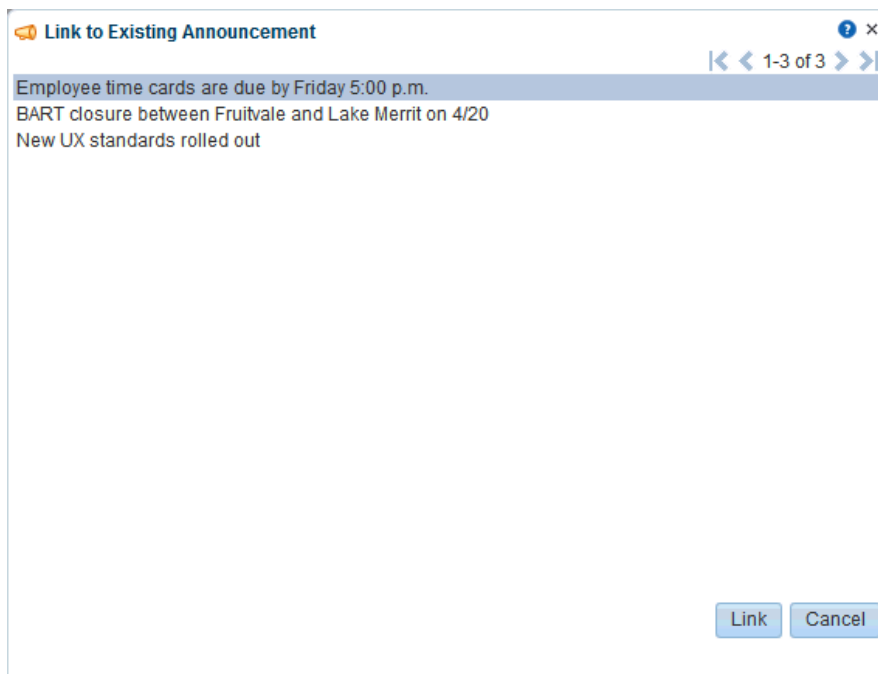
- From the Links dialog, select **Link to Existing** and then select **Announcement** (Figure 32–8).

Figure 32–8 Link to an Existing Announcement



The Link to Existing Announcement dialog opens (Figure 32–9).

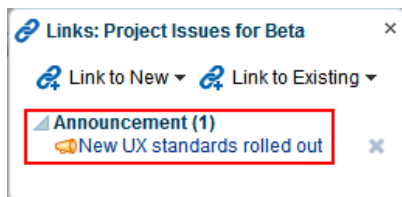
Figure 32–9 Existing Announcements



- Click the announcement to which you want to link.
- Click **Link**.

The title of the selected announcement appears in the list of links on the Links dialog (Figure 32–10).

Figure 32–10 Newly Added Announcement Link on Links Dialog



5. Close the Links dialog.

The link from the announcement topic to the list also appears in the Announcements view (Figure 32–11).

Figure 32–11 Link to List from Announcement Topic



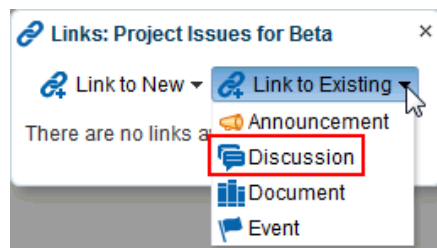
32.2.1.3 Linking to an Existing Discussion Forum Topic

Help users find answers to questions before they even ask them by linking to relevant discussion forum topics.

To link to an existing discussion forum topic:

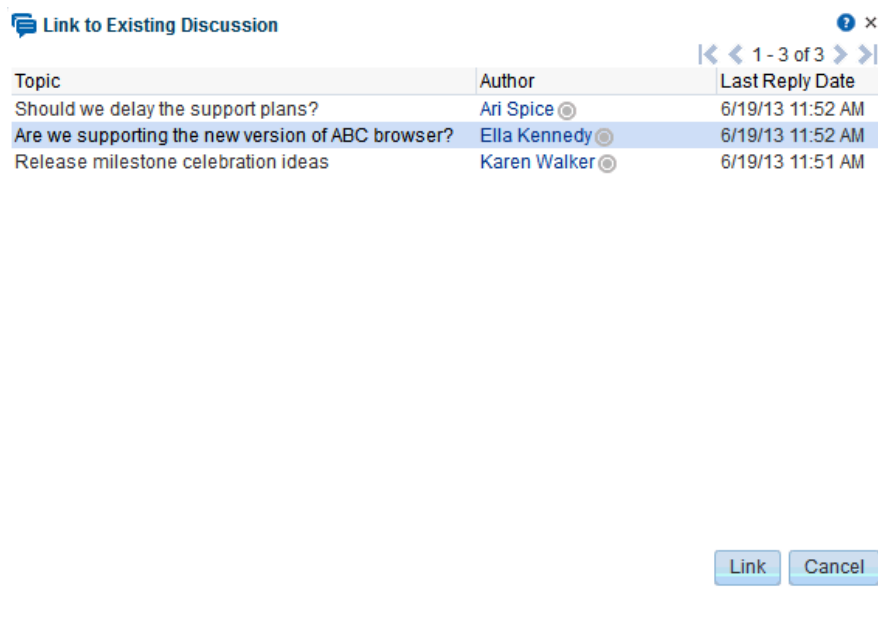
1. Go to the asset from which you want to link to a discussion forum message and click the **Links** icon.
See Section 32.2.1.1, "Opening the Links Dialog to Link to Existing Assets" for more information.
2. From the Links dialog, select **Link to Existing** and then select **Discussion** (Figure 32–12).

Figure 32–12 Link to an Existing Discussion



The Link to Existing Discussion Topic opens, listing available topics (Figure 32–13). If the portal supports multiple discussion forums, then a drop-down list at the top allows you to select a different forum.

Figure 32–13 Existing Discussion Topics



3. Select the discussion topic to which you want to link.
4. Click **Link**.

The title of the selected discussion topic appears in the list of links on the Links dialog (Figure 32–14).

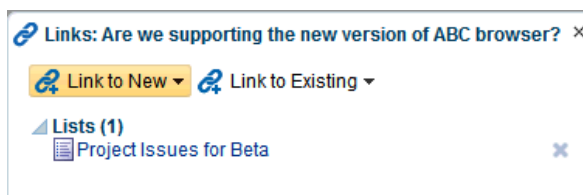
Figure 32–14 Newly Added Discussion Topic Link on Links Dialog



5. Close the Links dialog.

The link from the discussion topic to the list also appears in the Discussion Forum topic view (Figure 32–15).

Figure 32–15 Link to List from Discussion Topic



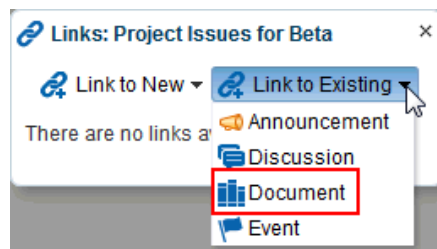
32.2.1.4 Linking to an Existing Document

To save users from having to search for documents in the document library, link to them directly. For example, link to a meeting's agenda directly from the meeting's event details.

To link to an existing document:

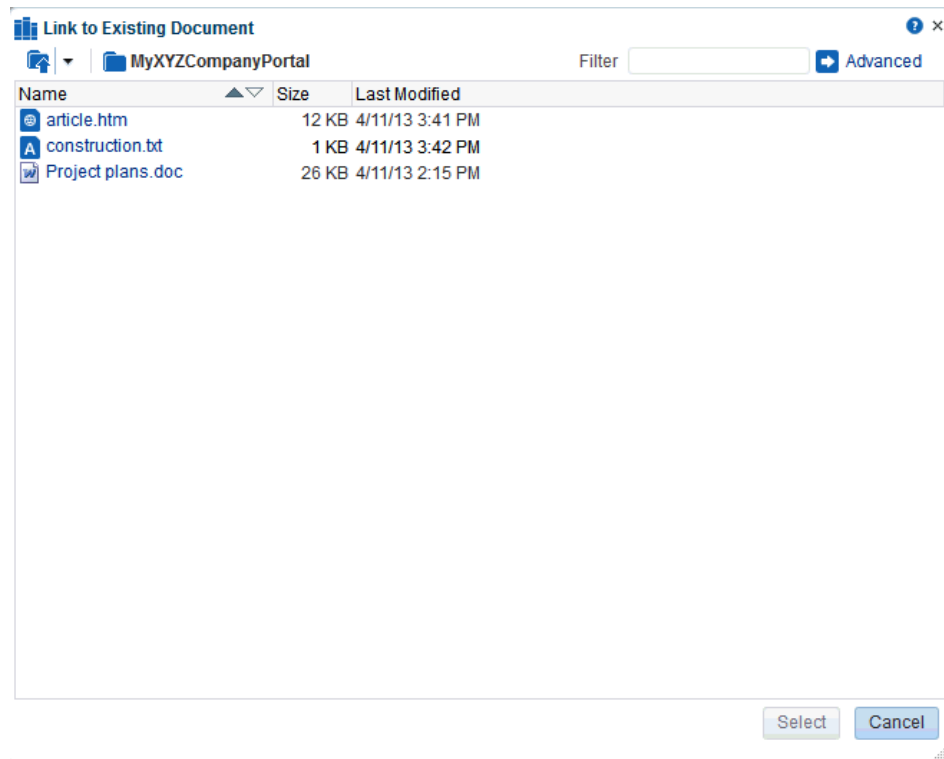
1. Go to the asset from which you want to link to a document and click the **Links** icon.
See [Section 32.2.1.1, "Opening the Links Dialog to Link to Existing Assets"](#) for more information.
2. From the Links dialog, select **Link to Existing** and then select **Document** ([Figure 32-16](#)).

Figure 32-16 *Link to Existing Document*



The Link to Existing Document dialog ([Figure 32-17](#)) opens.

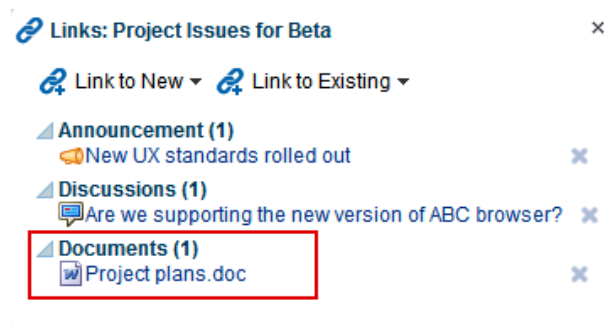
Figure 32-17 *Existing Documents*



3. Select the document, and then click **Select**.

The document link appears in the list of links on the Links dialog (Figure 32–18).

Figure 32–18 Newly Added Document Link on the Links Dialog



4. Close the Links dialog.

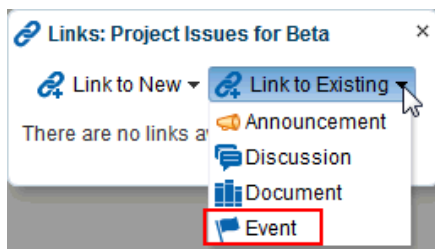
32.2.1.5 Linking to an Existing Event

You can link to information about events that are relevant to the current asset. For example, you could provide a link from an issues document to an event scheduled to discuss those very issues.

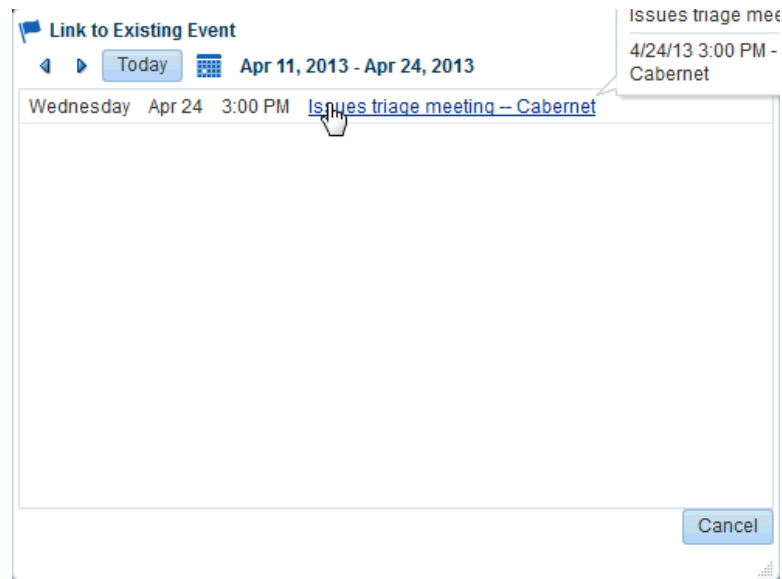
To link to an existing event:

1. Go to the asset from which you want to link to an event and click the **Links** icon.
See [Section 32.2.1.1, "Opening the Links Dialog to Link to Existing Assets"](#) for more information.
2. From the Links dialog, select **Link to Existing** and then select **Event** (Figure 32–19).

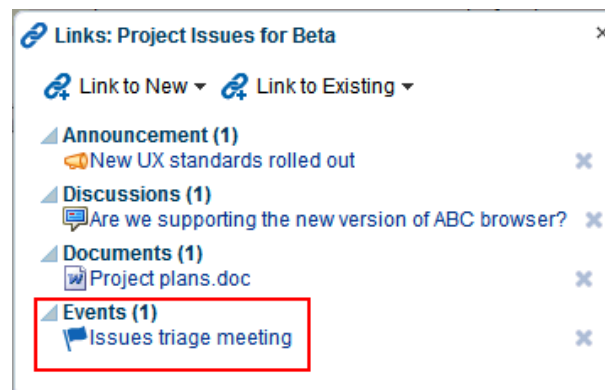
Figure 32–19 Link to Existing Event



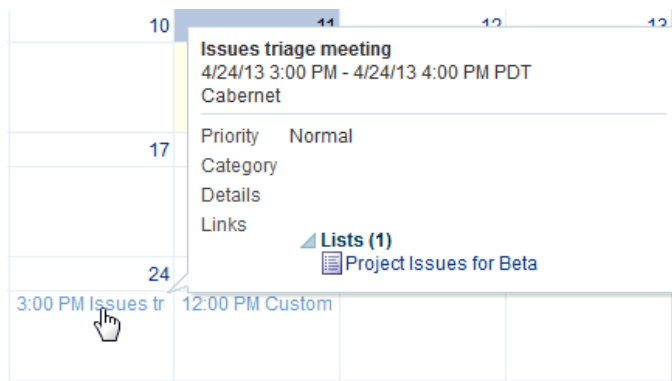
The Link to Existing Event dialog (Figure 32–20) opens, showing the current day's events.

Figure 32–20 Existing Events

3. Click the **Previous** and **Next** icons to go to the day of the event you want to link to, or click the **Select Date** icon and select the date of the event you want to link to.
4. Click the event to which you want to link.
The title of the selected event appears in the list of links in the Links dialog (Figure 32–21).

Figure 32–21 Newly Added Event on Links Dialog

5. Close the Links dialog.
The link from the event to the list also appears in the Events view (Figure 32–22).

Figure 32–22 Link to List from an Event

32.2.2 Linking to New Assets

When you select **Link to New**, you accomplish two things at the same time: you create a new asset, and you create a link to that asset. Use the **Link to New** option on the Links dialog to link to a new discussion forum topic, a new document, a new event, a new note, or a web page.

This section describes how to link to these types of assets. It contains the following topics:

- [Section 32.2.2.1, "Opening the Links Dialog to Link to a New Asset"](#)
- [Section 32.2.2.2, "Adding and Linking to a Discussion Forum Topic"](#)
- [Section 32.2.2.3, "Adding and Linking to a Document"](#)
- [Section 32.2.2.4, "Adding and Linking to an Event"](#)
- [Section 32.2.2.5, "Adding and Linking to a Note"](#)
- [Section 32.2.2.6, "Linking to a Web Page"](#)

32.2.2.1 Opening the Links Dialog to Link to a New Asset

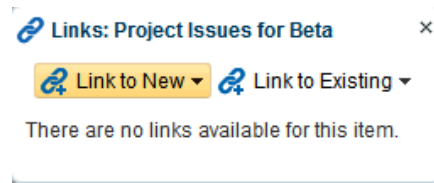
When you want to create a link to a new asset, go to the asset from which you want to link and open the Links dialog. From there, the steps vary depending on the type of asset you are creating and linking to.

To open the Links dialog:

1. Go to the asset from which you want to link.
2. Click the asset's (or row's) associated **Links** icon ([Figure 32–23](#)).

Figure 32–23 Links Icon

The Links dialog ([Figure 32–24](#)) appears.

Figure 32–24 Links Dialog

- From the Links dialog, select **Link to New** and then select the type of asset you want to create and link to.

For information about what to do next, see the following sections:

- Section 32.2.2.2, "Adding and Linking to a Discussion Forum Topic"
- Section 32.2.2.3, "Adding and Linking to a Document"
- Section 32.2.2.4, "Adding and Linking to an Event"
- Section 32.2.2.5, "Adding and Linking to a Note"
- Section 32.2.2.6, "Linking to a Web Page"

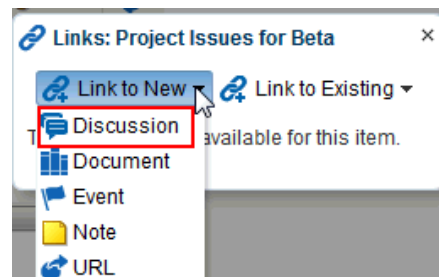
Note: In the following procedures, Lists is used as an example of an asset from which links to new assets are created.

32.2.2.2 Adding and Linking to a Discussion Forum Topic

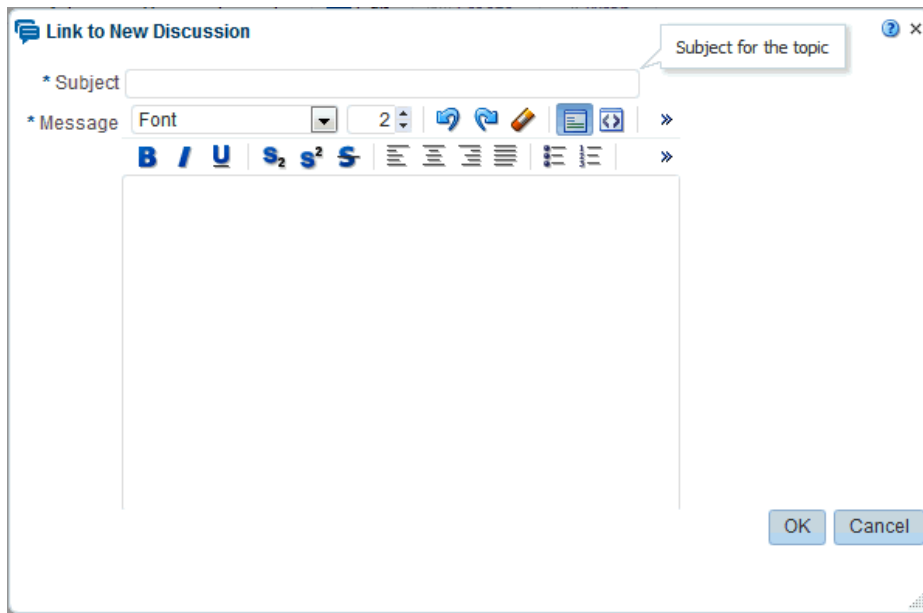
You can create a new topic thread directly from the asset that first prompted the discussion, adding a link at the same time.

To link to a new discussion forum topic:

- Go to the asset from which you want to link to a new discussion forum topic and click the **Links** icon.
See [Section 32.2.2.1, "Opening the Links Dialog to Link to a New Asset"](#) for more information.
- From the Links dialog, select **Link to New** and then select **Discussion** ([Figure 32–25](#)).

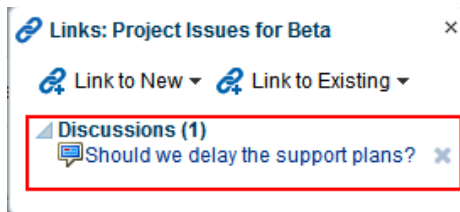
Figure 32–25 Link to New Discussion Topic

The Link to New Discussion dialog ([Figure 32–26](#)) opens.

Figure 32–26 Link to New Discussion Dialog

3. If the portal is configured for multiple discussion forums, then in the **Forum** list, select the forum in which you want to create the discussion topic.
4. In the **Subject** field, enter a subject for the new topic.
5. In the **Message** field, enter the content.
6. Click **OK**.

The topic is added to the appropriate discussion forum for the portal, and the link is added to the Links dialog (Figure 32–27).

Figure 32–27 Newly Created and Linked Discussion

7. Close the Links dialog.

32.2.2.3 Adding and Linking to a Document

When viewing an asset, such as a discussion forum topic, you might be aware of an informative document that would help other users. You can add the document or wiki to the document library directly from the original asset, adding a link to it at the same time.

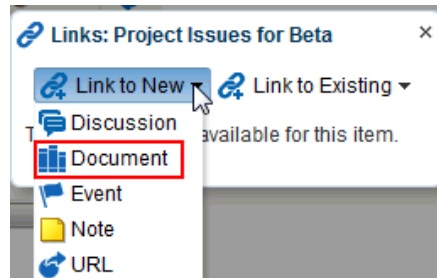
To link to a new document:

1. Go to the asset from which you want to link to a new document and click the **Links** icon.

See [Section 32.2.2.1, "Opening the Links Dialog to Link to a New Asset"](#) for more information.

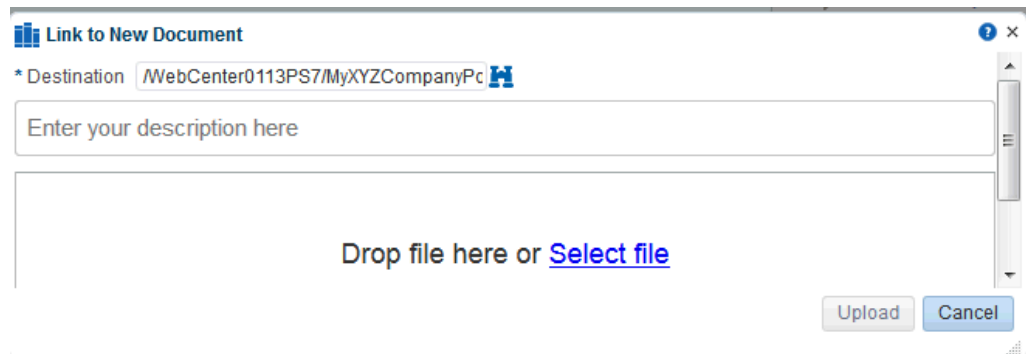
- From the Links dialog, select **Link to New** and then select **Document** (Figure 32–28).

Figure 32–28 Link to New Document



The Link to New Document dialog (Figure 32–29) opens.

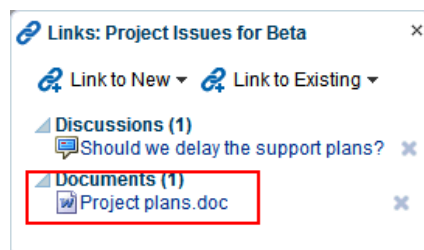
Figure 32–29 Link to New Document Dialog



- Click **Select File**, and navigate to the location of the document you want to upload.
- Select the document, and click **Open**.
- Enter an optional description and change the default destination directory, if necessary. Click the **Browse** icon to locate a destination, if necessary.
- Click **Upload**.

The document is uploaded, and the link is added to the Links dialog (Figure 32–30).

Figure 32–30 Newly Added and Linked Document



The location of the uploaded document depends on where you initiated the linking action. The document could be uploaded to the selected portal's document

library or to the root folder of your WebCenter Portal default document repository connection.

7. Close the Links dialog.

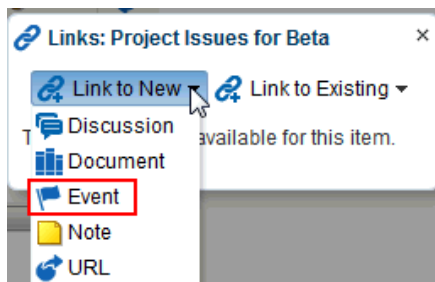
32.2.2.4 Adding and Linking to an Event

You can create a new event and add a link to it at the same time. For example, to schedule a meeting to address issues raised in a project, you can link the new event to the project issues list.

To add and link to a event:

1. Go to the asset from which you want to link to a new event and click the **Links** icon.
See [Section 32.2.2.1, "Opening the Links Dialog to Link to a New Asset"](#) for more information.
2. From the Links dialog, select **Link to New** and then select **Event** ([Figure 32–31](#)).

Figure 32–31 Link to New Event



The Link to New Event dialog ([Figure 32–32](#)) opens.

Figure 32–32 Link to New Event Dialog

Link to New Event

* Title

Location

Time

All Day Event

* Start Time

* End Time

Options

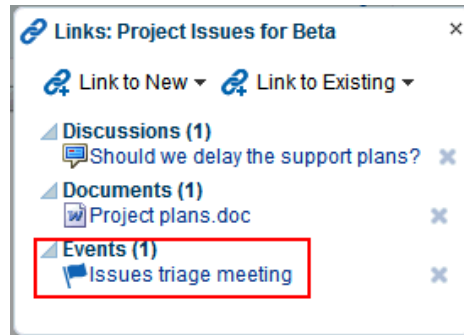
Priority

Category

Details

3. Enter the title, location, and other event details.
See [Section 29.2.3, "Scheduling Events"](#) for more information.
4. Click **Create**.
The event is created and the link is added to the Links dialog ([Figure 32–33](#)).

Figure 32–33 Newly Created and Linked Event



5. Close the Links dialog.

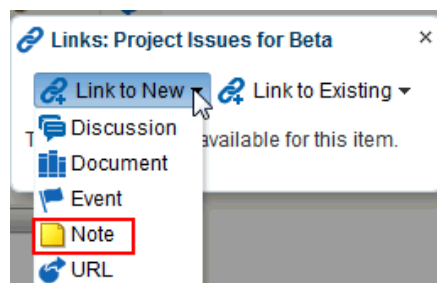
32.2.2.5 Adding and Linking to a Note

Create a personal note from an asset, or to add an annotation to an asset, like an online post-it note. The note is also linked to the asset, serving as a reminder whenever you view it.

To add and link to a note:

1. Go to the asset from which you want to add and link to a note and click the **Links** icon.
See [Section 32.2.2.1, "Opening the Links Dialog to Link to a New Asset"](#) for more information.
2. From the Links dialog, select **Link to New** and then select **Note** ([Figure 32–34](#)).

Figure 32–34 Link to New Note



The Link to New Note dialog ([Figure 32–35](#)) opens.

Figure 32–35 Link to New Note Dialog

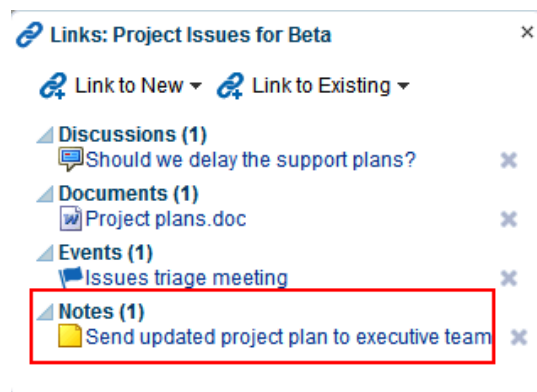
The dialog box is titled "Link to New Note" and contains the following elements:

- A title field labeled "* Title".
- A larger detail field labeled "Detail".
- "Create" and "Cancel" buttons at the bottom right.

3. In the **Title** field, enter a title for the note.
4. In the **Detail** field, enter the note content.
5. Click **Create**.

For more information about notes, see [Section 30, "Managing Your Notes."](#)

The newly created note link is added to the Links dialog ([Figure 32–36](#)).

Figure 32–36 Newly Created and Linked Note

6. Close the Links dialog.

32.2.2.6 Linking to a Web Page

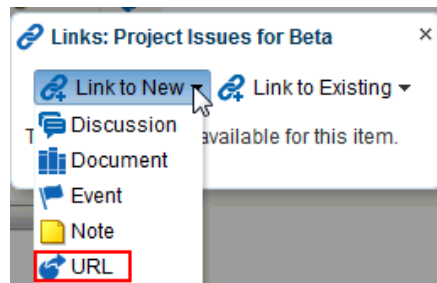
From an asset, you can link to a web page to provide access to additional information.

To link to a web page:

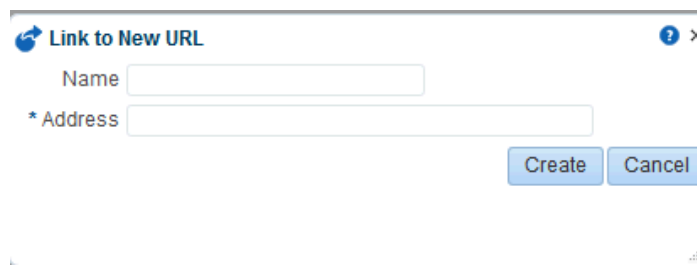
1. Go to the asset from which you want to link to a web page and click the **Links** icon.

See [Section 32.2.2.1, "Opening the Links Dialog to Link to a New Asset"](#) for more information.

2. From the Links dialog, select **Link to New** and then select **URL** ([Figure 32–37](#)).

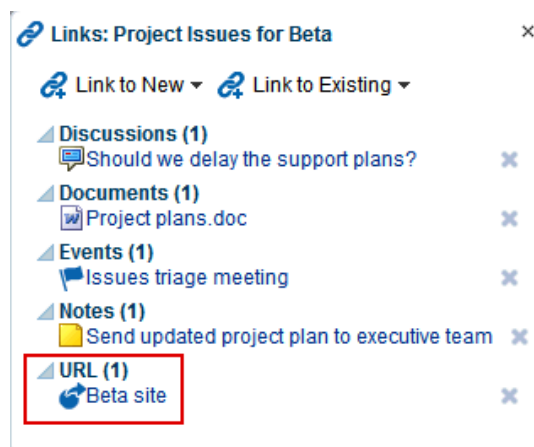
Figure 32–37 Link to New URL

The Link to New URL dialog (Figure 32–38) opens.

Figure 32–38 Link to New URL Dialog

3. In the **Name** field, enter a display name to use for the link.
4. In the **Address** field, enter the URL of the page to which you want to link.
5. Click **Create**.

The link is added to the Links dialog (Figure 32–39).

Figure 32–39 Newly Created and Linked URL

6. Close the Links dialog.

32.2.3 Accessing Link Targets

You access link targets from the Links dialog. If links exist from an asset, it is indicated by the gold Links icon (Figure 32–40).

To access a link target:

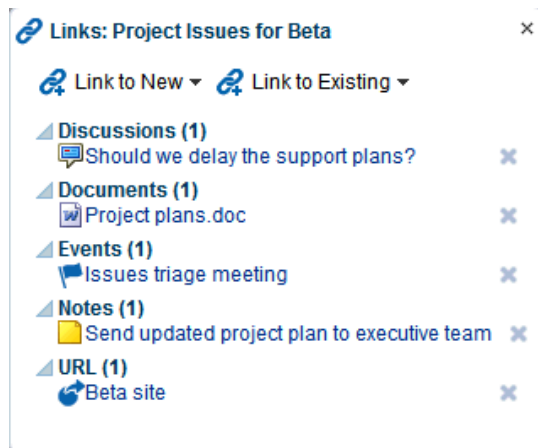
1. Click the **Link** icon (Figure 32–40) associated with the asset.

Figure 32–40 Link Icon That Has Links



2. Click the link you want to open on the resulting Links dialog (Figure 32–41).

Figure 32–41 Links in the Links Dialog



32.2.4 Deleting a Link

Delete a link when it is no longer useful or when it is obsolete. For example, you can delete a link to an event after the event date has passed.

To delete a link:

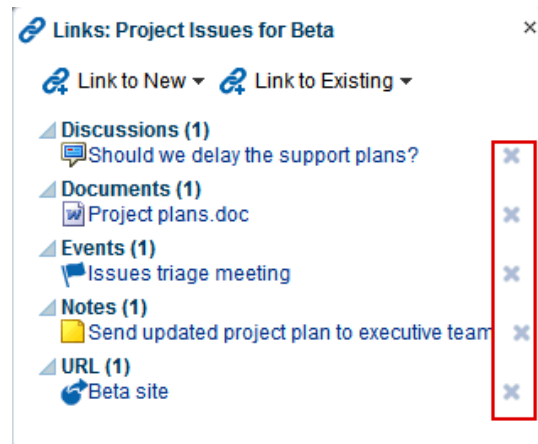
1. Go to the asset associated with the link you want to delete, such as the document, list, list row, or other item for which the link was created.
2. Click the **Links** icon (Figure 32–42).

Figure 32–42 Links Icon



The Links dialog opens, showing a list of current links to the asset.

3. Click the **Delete** icon next to the link you want to delete (Figure 32–43).

Figure 32–43 Delete Icons Next to Links

The two assets are no longer linked. You can link the two assets again, if you wish to do so. See [Section 32.2.1, "Linking to Existing Assets"](#) and [Section 32.2.2, "Linking to New Assets."](#)

32.2.5 Linking in the Rich Text Editor

The Rich Text Editor (RTE) included with the Documents tool or Mail is an HTML text editor, which you can use to link to existing and new WebCenter Portal assets. See [Section 19.7, "Using the Rich Text Editor \(RTE\)"](#) for more information.

For example, in a new Wiki document, you can link to existing announcements, discussions, documents, and events, and link to new discussions, documents, events, notes, URLs, or another Wiki document. This feature provides a quick way to add and link to a new, empty wiki page.

[Figure 32–44](#) shows the highlighted RTE icons to link to existing or new assets.

Figure 32–44 New Wiki Document in Rich Text Editor (RTE)

See [Section 19.7, "Using the Rich Text Editor \(RTE\)"](#) for more information.

Working with Tags

This chapter describes how to use tags, which enable you to bookmark portal pages and documents using your own meaningful terms.

Note: To use tags, the **Tags** icon must be available on a page. This is typically accomplished when a Tags component is included in the page template that is used to create pages in the portal, but a page creator can also add a Tags component to an individual page. This is an advanced task, described in the "Adding a Tags Icon to a Portal Page" section in *Building Portals with Oracle WebCenter Portal*.

This chapter includes the following topics:

- [Section 33.1, "About Tags"](#)
- [Section 33.2, "About the Tag Center"](#)
- [Section 33.3, "Using and Managing Tags"](#)

Permissions: The tasks described in this chapter are available to any WebCenter Portal user with access to portal pages or documents that contains tags.

33.1 About Tags

A *tag* is a word you associate with a portal page or document, applying your own classification to improve search results, and to gather disparate items into a cohesive body of knowledge and share it with others. For example, you could apply the tag *staff* to a page that provides useful information about the organizational structure of your company. When you or others search for *staff*, the tagged page appears in the results.

You can provide one or multiple tags to a given item. And multiple users can use the same tag term that you used and apply it to the same item. Duplicates of tags across users are tabulated and provide extra weight to the relevance of the tag term.

You have the option of sharing tags or keeping them to yourself. Share tags to enable other users to discover them in their searches. When you do not share a tag, users searching on an identical term do not discover the items you tagged with that term, unless some other user tagged the item with the same term and shared that tag.

Tags are available for managing in several Tagging views, search results, and in the Tag Center, where you can see what tags were used and what items were tagged.

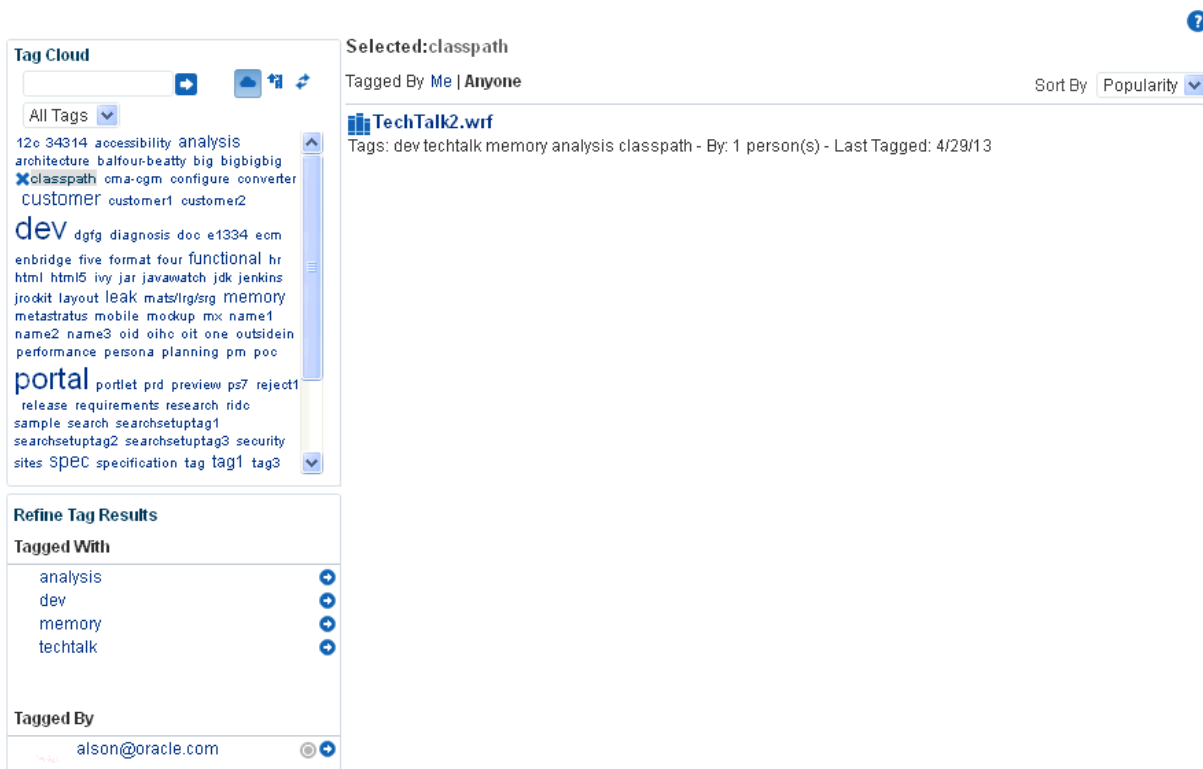
Tagging assists with building a knowledge network where each user can benefit from the assessments of all users.

When looking at tags in the Tag Center, note the number of times the tag was applied to a particular object. This number indicates the tag's relevance to that object, and ultimately causes a collective classification scheme popularly known as a *folksonomy*. This can make information easier to search and navigate over time.

33.2 About the Tag Center

The Tag Center is a dynamically-generated page that displays all the tags you and other users have applied to portal pages and documents (Figure 33–1).

Figure 33–1 The Tag Center



The Tag Center offers the most complete use of tag data by providing access not only to your tags, but to the tags applied by other users. Additionally it provides a visual depiction of tag popularity, which enables you to refine tag results using filters. You can filter for multiple tags simultaneously or filter by other users who have applied the same tags. A sorting feature provides an additional means of controlling your view of tagged pages and documents.

The Tag Center has three sections:

- The **Tag Cloud** section, which you can use to view a cloud or list of the tags currently applied to pages and documents. This section reflects the same information as the Tag Cloud view, which may be added to a page by a portal manager as a separate view.
- The **Refine Tag Results** section with two types of lists: a **Tagged With** list of all other tags used on items that also use the currently selected tag and a **Tagged By** list of other users who have applied the selected tag.

- The **Selected: tag** tagged items section, which provides a list of all pages and documents to which you have access that use the currently selected tag and options to edit, sort, and filter the items. This section reflects the same information as the Tag Cloud Related Resources view, which may be added to a page by a portal manager as a separate view.

The Tag Cloud is a visual depiction of currently applied tags ([Figure 33–2](#)).

Figure 33–2 The Tag Cloud



Tags are presented according to the frequency of their use. More frequently used tags display in bold fonts and varying font sizes—the larger the font, the more frequently the tag has been applied. Click a tag in the tag cloud to execute a search that returns a list of all items to which you have access that use the tag.

To learn how to work with tags in the Tag Center see [Section 33.3.4, "Working with Tags in the Tag Center."](#)

33.3 Using and Managing Tags

This section provides information about tagging your portal pages and documents, and how to work with those tags. It includes the following topics:

- [Section 33.3.1, "Tagging Portal Pages"](#)
- [Section 33.3.2, "Tagging Documents"](#)
- [Section 33.3.3, "Viewing Tags in Search Results"](#)
- [Section 33.3.4, "Working with Tags in the Tag Center"](#)
- [Section 33.3.5, "Working with Tags in the Tags View"](#)
- [Section 33.3.6, "Working with the Tag Cloud and Tag Cloud Related Resources Views"](#)
- [Section 33.3.7, "Working with the Similarly Tagged Items View"](#)

33.3.1 Tagging Portal Pages

On any page where you see the **Tags** icon ([Figure 33–3](#)), you can associate tags with the page.

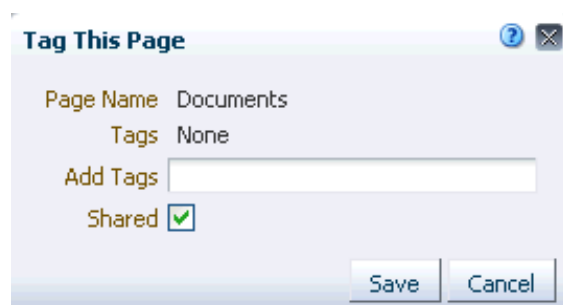
Figure 33–3 Tags Icon

Note: The **Tags** icon is typically available on a portal page when a Tags component is included in the page template that is used to create pages in the portal, but a page creator can also add a Tags component to an individual page. This is an advanced task, described in the "Adding a Tags Icon to a Portal Page" section in *Building Portals with Oracle WebCenter Portal*.

To tag a portal page:

1. Go to the page you want to tag.
2. Click the **Tags** icon.

The Tag This Page dialog opens ([Figure 33–4](#)).

Figure 33–4 Tag This Page Dialog

3. In the **Add Tags** field, enter one or more tags, separated with a space. Use underscores or hyphens in multi-word tag entries.
4. To share your tag(s) with other users, click the **Shared** check box. If your system administrator has disabled the **Shared** check box, then it does not appear.

When other users search for a term you used as a tag, the page you tagged appears in their search results. If you deselect the **Shared** check box, then their search will omit your tagged page from their search results, unless they have tagged the page themselves using the same term. Regardless of whether you select or deselect **Shared**, your own search results will always find the pages you tagged.

5. Click **Save** to apply the tag(s) to the page and close the dialog.

Note: For information about searching for tags, see [Section 33.3.3, "Viewing Tags in Search Results."](#)

33.3.2 Tagging Documents

To tag a document in WebCenter Portal, see [Section 19.15, "Managing Tags on Files."](#)

33.3.3 Viewing Tags in Search Results

Tags and Tagged Items appear in search results only when WebCenter Portal's live search adapter is configured. For more information on search configurations, see [Section 3.1.1, "Running Various Search Environments."](#)

Tag search results ([Figure 33–5](#)) appear under two headings:

- **Tags**, which shows tags that at least partially match the search criteria; for example, if you search for *page*, the following tags are returned: *page*, *pages*, or *pager*.
- **Tagged Items**, which shows items that are associated with a tag that matches the search criteria exactly; for example, if you search for *page*, only items associated with the tag *page* are returned; items associated with the following tags are not returned: *pages* or *pager*.

Figure 33–5 Search Page with Tag Results



Under these headings, tag search results appear like any other search results; however, tags in tag search results behave a little differently. When you click tagged items in tag search results or when you click other types of search results, their associated content is shown. When you click a tag in tag search results, the Tag Center opens with that tag preselected.

Note: Results appear differently if you are using WebCenter Portal's live search adapters or Oracle SES for the search engine. For more information, see [Section 3.1, "About Searching in WebCenter Portal."](#)

33.3.4 Working with Tags in the Tag Center

This section describes how to work with tags in the dynamically-generated Tag Center (see [Section 33.2, "About the Tag Center"](#)). It includes the following topics:

- [Section 33.3.4.1, "Opening the Tag Center"](#)
- [Section 33.3.4.2, "Selecting Different Views and Arrangements of the Tag Cloud in the Tag Center"](#)
- [Section 33.3.4.3, "Selecting Different Views and Arrangements of Tagged Items in the Tag Center"](#)
- [Section 33.3.4.4, "Refining the Display of Information in the Tag Center"](#)
- [Section 33.3.4.5, "Discovering Who Has Used a Tag in the Tag Center"](#)

33.3.4.1 Opening the Tag Center

To open the Tag Center ([Figure 33–6](#)):

- Click a tag returned as a search result (see [Section 33.3.3, "Viewing Tags in Search Results"](#))
- Or, click a tag displayed in a Tags view on a page (see [Section 33.3.5.1, "Viewing Tags in the Tags View"](#))

Figure 33–6 The Tag Center

The screenshot displays the Oracle Tag Center interface. On the left, the 'Tag Cloud' section lists various tags, with 'classpath' highlighted in red. Below the tag cloud is the 'Refine Tag Results' section, which includes 'Tagged With' (analysis, dev, memory, techtalk) and 'Tagged By' (alison@oracle.com). The main content area shows 'Selected: classpath' and 'Tagged By Me | Anyone' with a 'Sort By Popularity' dropdown. A specific tag 'TechTalk2.wrf' is selected, showing 'Tags: dev techtalk memory analysis classpath - By: 1 person(s) - Last Tagged: 4/29/13'.

Additionally, the system administrator can add a page for the Tag Center in the Home portal.

The selected tag determines all the tag-related information that appears in the Tag Center. For example:

- The selected tag is highlighted in the **Tag Cloud** section ([Figure 33–7](#)).

Figure 33–7 Tag Cloud

You can select another tag in the Tag Cloud to change the information that is displayed in the Tag Center. Additionally, you can rearrange your view (see [Section 33.3.4.2, "Selecting Different Views and Arrangements of the Tag Cloud in the Tag Center"](#)).

- Other tags used on items that also use the currently selected tag display in the **Refine Tag Results** section in the **Tagged With** list ([Figure 33–8](#)).

Figure 33–8 Tagged With List in the Tag Center

- Other users who applied the selected tag are listed in the **Refine Tag Results** section in the **Tagged by** list ([Figure 33–9](#)).

Figure 33–9 Tagged By List in the Tag Center

- Items tagged with the currently selected tag appear in the **Selected: tag** tagged items section ([Figure 33–10](#)). Click a tagged item link to display the item.

Figure 33–10 Tagged Items Section of the Tag Center

33.3.4.2 Selecting Different Views and Arrangements of the Tag Cloud in the Tag Center

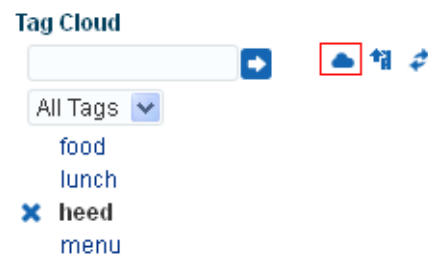
The Tag Center's Tag Cloud (Figure 33–11) is a visual depiction of all the tags used. By default, tags are presented according to the frequency of their use. More frequently used tags display in bold fonts and varying font sizes—the larger the font, the more the tag has been applied.

You can adjust your view of the Tag Cloud using its sorting and filtering features.

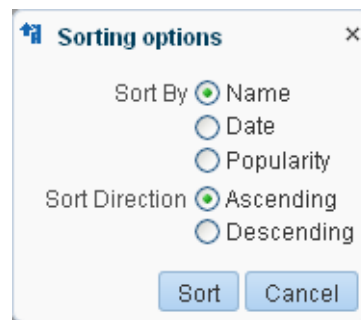
Figure 33–11 Tag Cloud

To adjust your view of the Tag Cloud in the Tag Center:

- To filter tags, enter a search term in the text box on the Tag Cloud toolbar, and click the **Search** icon.
The tag display refreshes showing only those tags that meet the search criteria. To refresh the search criteria, select an option from the menu:
 - **All Tags** to remove the search criteria, showing all tags added by all users
 - **My Tags** to remove the search criteria, showing only your tags
 - **All tags containing 'term'** to show all tags added by all users that meet the search criteria
 - **My tags containing 'term'** to show only your tags that meet the search criteria
- To switch between displaying the tags in cloud view or list view, click the cloud icon (Figure 33–12).

Figure 33–12 Cloud Icon in the Tag Cloud

- To sort the tags:
 1. Click the **Sorting options** icon on the Tag Cloud toolbar to open the Sorting options dialog (Figure 33–13).

Figure 33–13 Sorting Options Dialog

2. Choose from:
 - **Name** to sort the list alphabetically. If you choose **Ascending**, the list is sorted from 1 to 9 and a to z. If you choose **Descending**, the list is sorted from z to a and 9 to 1.
 - **Date** to sort the list based on when tags were added. If you choose **Ascending**, the tags are sorted from those applied most recently to those applied longest ago. If you choose **Descending**, the tags are sorted from those applied longest ago to those applied most recently.
 - **Popularity** to sort the list based on how frequently the tag has been applied. If you choose **Ascending**, the tags are sorted from those that have been applied most frequently to those that have been applied least frequently. If you choose **Descending**, the tags are sorted from those applied least frequently to those applied most frequently.
 3. Click **Sort** to apply your selection and close the Sorting options dialog.
- To refresh the list of tags, click the **Refresh tags** icon.
 - To show all tags or just your tags, choose from:
 - **All Tags** to show every tag added by all users
 - **My Tags** to show only the tags you have added

33.3.4.3 Selecting Different Views and Arrangements of Tagged Items in the Tag Center

The Tag Center provides a selection of sorting criteria to enable you to display tagged items in the way that you prefer. Click a tagged item link to display the item.

Using the **Tagged By** and **Sort By** options (Figure 33–14), you can choose which tag items to show and the order in which to show them.

Figure 33–14 Tagged By and Sort By Options for Tagged Items in the Tag Center



To choose the tagged items to view, choose from:

- **Tagged by Me** to show only the items that use the selected tag that you have tagged yourself
- **Tagged by Anyone** to show all items that use the selected tags

To arrange the order of displayed tagged items, choose from:

- **Popularity** to sort the list from items that have been tagged most frequently with the current tag to those tagged least frequently
- **Name** to sort the list alphabetically from 1 to 9 and a to z
- **Date** to sort the list from items that have been tagged most recently to those tagged longest ago

33.3.4.4 Refining the Display of Information in the Tag Center

You can further refine your view of information in the Tag Center by selecting additional tags in the **Tagged With** list (Figure 33–15).

Figure 33–15 Tagged With List in the Tag Center



The **Tagged With** list displays all the other tags used on pages and documents that also use the currently selected tag. Click a tag in the **Tagged With** list to further restrict the information in the Tag Center to information associated with both the selected tag and the related tag you clicked.

For example, imagine that the Tag Center displays all items tagged with the term `dev`. Click `analysis` in the **Tagged With** list to further refine the information in the Tag Center to information that is associated with both `dev` and `analysis`.

33.3.4.5 Discovering Who Has Used a Tag in the Tag Center

You can further refine your view of information in the Tag Center by selecting other users in the **Tagged By** list (Figure 33–16).

Figure 33–16 Tagged By List in the Tag Center



The **Tagged By** list lists all other users who have applied the selected tag or tags. Click a user in the **Tagged By** list to limit the information in the Tag Center to information tagged with the selected tag and also tagged by the user you clicked.

For example, if the currently-selected tag is `menu`, and the user `pat` appears under **Tagged By**, then clicking `pat` shows information associated with the tag `menu`, applied by `pat`.

33.3.5 Working with Tags in the Tags View

The Tags view is available when the Tags task flow has been added to a portal page (as described in "Adding a Tagging Task Flow to a Page" in *Building Portals with Oracle WebCenter Portal*).

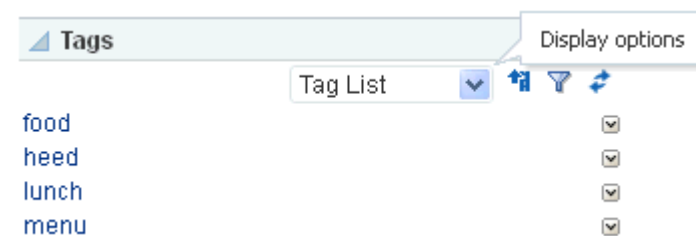
This section describes how to work with tags in the Tags view. It includes the following topics:

- Section 33.3.5.1, "Viewing Tags in the Tags View"
- Section 33.3.5.2, "Sorting Tags in the Tags View"
- Section 33.3.5.3, "Filtering Tags in the Tags View"
- Section 33.3.5.4, "Renaming a Tag in the Tags View"
- Section 33.3.5.5, "Deleting a Tag in the Tags View"

33.3.5.1 Viewing Tags in the Tags View

The Tags view shows all tags (Figure 33–17) and tagged items.

Figure 33–17 Tags View



From the drop-down list, select:

- **Tag List** to view a list of tags, which you can click to open the Tag Center and further refine your selection (see [Section 33.3.4, "Working with Tags in the Tag Center"](#)). You can also use it to display a tag cloud or tagged pages.
- **Tag Cloud** to view a tag cloud depiction of your tags, which you can also click to open the Tag Center and further refine your selection.
- **Tagged Items** to view all the items that have been tagged, which you can click to open the associated page or document.

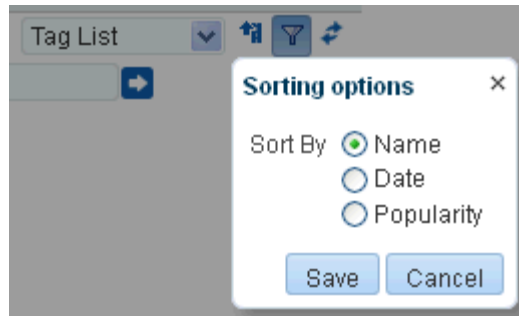
33.3.5.2 Sorting Tags in the Tags View

When your tag or tagged items list is long, sorting the list makes it easier to find specific tags or tagged items by name, date, or popularity.

To sort tags or tagged items in the Tags view:

1. Click the **Sorting options** icon at the top of the Tags view to open the Sorting options dialog ([Figure 33–18](#)).

Figure 33–18 The Sorting Options Dialog



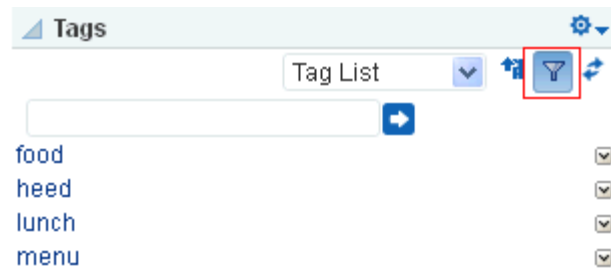
2. Select sorting criteria:
 - **Name** to sort the list alphabetically from 1 to 9 and a to z.
 - **Date** to sort the list from the tags applied most recently to those applied longest ago. When tagged items are shown, **Date** sorts the list from the items tagged most recently to the items with the oldest tags.
 - **Popularity** to sort the list from the tags that have been applied most frequently to those that have been applied least frequently. When tagged items are shown, **Popularity** sorts the list from the items that have been tagged by the most people to the items tagged by the fewest.
3. Click **Save** to apply your selection and close the dialog.

33.3.5.3 Filtering Tags in the Tags View

Filtering provides a way to view a subset of tags or tagged items.

To filter tags or tagged items in the Tags view:

1. Click the **Filter** icon to open a filtering term field ([Figure 33–19](#)).

Figure 33–19 Filter Icon

2. Enter a filtering term, and click the **Search** icon.

The list refreshes, showing only those tags or tagged items that match or include the filtering term.

3. Clear the filtering term, and click the **Search** icon to restore all tags or tagged items in the list.
4. Click the **Filter** icon to exit filtering.

33.3.5.4 Renaming a Tag in the Tags View

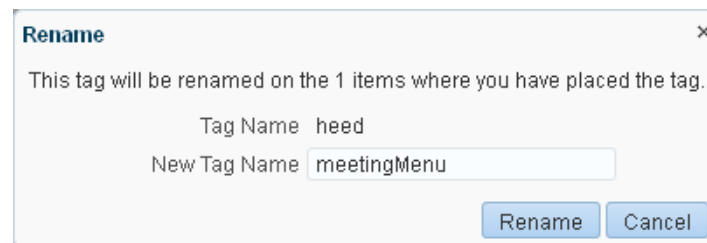
When you rename a tag, you rename all instances of the tag that you applied. If other users applied the same tag, their instances are not renamed.

To rename tags in the Tags view:

1. Click the tag actions icon next to the tag, and select **Rename** (Figure 33–20).

Figure 33–20 Tag Actions Icon

2. In the Rename dialog, enter a new name for the selected tag, and click **Rename** (Figure 33–21).

Figure 33–21 Rename Dialog

All tags you created using the original tag name are renamed.

33.3.5.5 Deleting a Tag in the Tags View

When you delete a tag, it is deleted wherever you applied it. If other users applied the same tag, their tags are left as is.

To delete a tag in the Tags view:

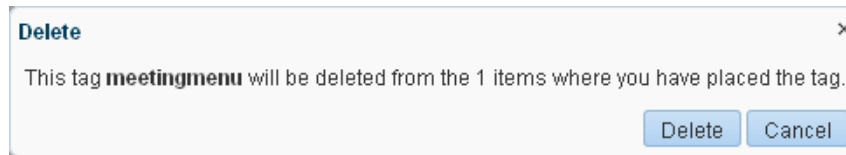
1. Click the tag actions icon next to the tag, and select **Delete** (Figure 33–22).

Figure 33–22 Tag Actions Icon



2. In the Delete dialog, click **Delete** (Figure 33–23).

Figure 33–23 Delete Dialog



The tag is removed from the Tags view and from any items to which it was applied.

33.3.6 Working with the Tag Cloud and Tag Cloud Related Resources Views

The Tag Cloud and Tag Cloud Related Resources views are available when the associated task flows have been added to a portal page (as described in "Adding a Tagging Task Flow to a Page" in *Building Portals with Oracle WebCenter Portal*).

Working in the Tag Cloud view (Figure 33–24) is identical to working in the Tag Cloud section of the Tag Center. See Section 33.3.4.2, "Selecting Different Views and Arrangements of the Tag Cloud in the Tag Center."

Figure 33–24 Tag Cloud View





When you select a tag in the Tag Cloud view, you see the results in the Tag Cloud Related Resources view.

Working in the Tag Cloud Related Resources view (Figure 33–25) is identical to working in the tagged items section of the Tag Center. See Section 33.3.4.3, "Selecting Different Views and Arrangements of Tagged Items in the Tag Center." Click a tagged item link to display the item.

Figure 33–25 Tag Cloud Related Resources View

Selected: performance

Tagged By [Me](#) | [Anyone](#) Sort By [Popularity](#) ▼

 javawatch.ppt Tags: dev diagnosis techtalk performance javawatch - By: 1 person(s) - Last Tagged: 4/29/13	<div style="border: 1px solid black; padding: 2px;"> Popularity Name Date </div>
 TechTalk6.wrf Tags: dev diagnosis trackerlite techtalk performance - By: 1 person(s) - Last Tagged: 4/29/13	
 javawatch.wrf Tags: dev diagnosis techtalk performance javawatch - By: 1 person(s) - Last Tagged: 4/29/13	

33.3.7 Working with the Similarly Tagged Items View


The Similarly Tagged Items view is available when the Similarly Tagged Items task flow has been added to a portal page (as described in "Adding a Tagging Task Flow to a Page" in *Building Portals with Oracle WebCenter Portal*).

The Similarly Tagged Items view ([Figure 33–26](#)) provides a list of links to other pages or documents that have at least one tag in common with the current page. Click a tagged item link to display the item.

Figure 33–26 Similarly Tagged Items View

Similarly Tagged Items ▼

Items that have at least one tag in common with the current page:

 [Home](#)
Tags: page - By: 1 person(s) - Last Tagged: 4/7/2009

