Oracle® Fusion Middleware

User's Guide for Oracle WebCenter

11*g* Release 1 (11.1.1)

E10149-04

April 2010

Oracle Fusion Middleware User's Guide for Oracle WebCenter, 11*g* Release 1 (11.1.1)

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Preface

Welcome to Oracle Fusion Middleware User's Guide for Oracle WebCenter. This guide describes the runtime behavior of the WebCenter Spaces application. Much of this information also applies to custom WebCenter applications, though it is written with WebCenter Spaces users in mind. (For information about custom WebCenter applications, see *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter*.)

This guide provides instructions for such tasks as creating personal and group spaces; creating, populating, and managing pages; setting application preferences; and working with services and portlets.

> **Note:** This guide depicts the application user interface (UI) in screenshots. Users can apply different templates to the application UI to adjust its look and feel; therefore, your view of the application may differ somewhat from the views depicted in screenshots.

Audience

This document is intended for WebCenter application users who are interested in personalizing and customizing application pages and in creating online communities centering around a group project or a shared area of interest. It is also intended for business developers interested in creating enterprise mashups through runtime component wiring.

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Related Documents

For more information, see the following documents in the Oracle Fusion Middleware 11*g* Release 1 (11.1.1) documentation set:

- *Oracle Fusion Middleware Tutorial for Oracle WebCenter Spaces Users*
- *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter*
- *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter*

Conventions

The following text conventions are used in this document:

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

Part I

Fundamentals of the WebCenter Spaces Application

Part I of this guide provides an orientation to the WebCenter Spaces application, including an overview and information about learning your way around and setting it up to your liking. It contains the following chapters:

- Chapter 1, "Understanding Oracle WebCenter Spaces Basics"
- Chapter 2, "Learning Your Way Around"
- Chapter 3, "Setting Your Personal Preferences"
- Chapter 4, "Organizing Your Environment"
- Chapter 5, "Creating and Managing Favorites"

1 Understanding Oracle WebCenter Spaces Basics

Welcome to Oracle WebCenter Spaces!

This chapter provides a high-level overview of the features and benefits of Oracle WebCenter Services and the WebCenter Spaces application. It includes the following sections:

- Section 1.1, "Introducing the WebCenter Spaces Application"
- Section 1.2, "Introducing WebCenter Services"
- Section 1.3, "A Day in the Life of WebCenter"

Audience

This chapter is intended for users who want to understand what the WebCenter Spaces application and Oracle WebCenter Services are and what they have to offer. Additionally, it introduces Oracle Composer, the WebCenter runtime page editor.

Much of the information in this guide also applies to the runtime version of custom WebCenter applications, though it is written with WebCenter Spaces users in mind. (For information about custom WebCenter applications, see *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter*.)

1.1 Introducing the WebCenter Spaces Application

This section explores WebCenter Spaces features and concepts and previews much of its functionality. It contains the following subsections:

- Section 1.1.1, "Understanding the WebCenter Spaces Application"
- Section 1.1.2, "Understanding the Sidebar and Personal and Group Spaces"
- Section 1.1.3, "Understanding Oracle Composer"

1.1.1 Understanding the WebCenter Spaces Application

WebCenter Spaces is a Web-based application that offers the very latest technology for social networking, communication, collaboration, and personal productivity. Through a robust set of services and applications, WebCenter Spaces provides everything essential for exchanging ideas with others, interacting with your critical applications, and zeroing in on your own projects and interests—all within a single, integrated environment.

WebCenter Spaces provides a prebuilt application framework out-of-the-box. This includes established pathways to application configuration, customization, and personalization. For example, after install, you can immediately access personal settings, such as application Preferences, with no design-time development required. Contrast this with custom WebCenter applications, which are user-designed applications that integrate WebCenter services into a custom application framework.

Note: WebCenter Spaces and custom WebCenter applications share many similarities at runtime. Consequently, much of the information in this guide is applicable to both WebCenter Spaces and custom WebCenter applications. Note, however, that this guide is written primarily with WebCenter Spaces users in mind.

WebCenter Spaces exposes collaborative, social networking, and personal productivity features through *services*, which, in turn, expose subsets of their features and functionality through *task flows*. Services provide a wide variety of functionality in support of personal and team objectives. Task flows provide reusable functionality that may expose all or a subset of the features available from a particular service. See Section 1.2, "Introducing WebCenter Services."

A runtime page editor, Oracle Composer, provides an entry into the structural and configurable underpinnings of the WebCenter Spaces application. Use Oracle Composer to manipulate page layouts, add page content, and configure pages and content to suit your requirements. See Section 6.2, "Introducing Oracle Composer."

The WebCenter Spaces application provides the foundation for establishing social networks for organizing your work around specific projects and deliverables and locating experts to help in accomplishing project tasks. See Section 1.1.2, "Understanding the Sidebar and Personal and Group Spaces."

Most importantly, WebCenter Spaces provides the capability of including Enterprise Application content directly into a space to ensure that all the information essential to making informed decisions is within easy reach. WebCenter Spaces provides many pathways to application integration: You can integrate application data views, add portlets, bring in external task flows as portlets across a portlet bridge, publish a task flow as a link that is integrated with the Oracle Single Sign-On Server, add an application through an IFRAME that is integrated with the Oracle Single Sign-On Server, and enter JavaScript using OmniPortlet or the HTML Markup layout component.

See Also: For more information about OmniPortlet, see Chapter 33, "Working with OmniPortlet." For more information about the HTML Markup layout component, see Section 9.1.2, "The HTML Markup Layout Component." Other application integration scenarios are discussed in the chapter, "Integrating with Oracle WebCenter Spaces," in the *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter*.

In both personal and group spaces, authenticated users can create pages that mash up multiple services into, for example, a central access point for personal organization or group communication and project resources. Authorized users at all levels of technical expertise can easily add all kinds of resources to a page. Among these are business intelligence charts, reports, portlets, business applications, services, and other Application Development Framework (ADF) resources or views. Combining all this information into a location that is dedicated to a specific project creates a unique and useful *enterprise mashup*. See Chapter 10, "Working with Page Content."

1.1.2 Understanding the Sidebar and Personal and Group Spaces

Oracle WebCenter Spaces provides two work environments within a single application: *personal spaces* and *group spaces*. This section provides a brief overview of both environments. It contains the following subsections:

- Section 1.1.2.1, "Understanding the Sidebar"
- Section 1.1.2.2, "Understanding Personal Spaces"
- Section 1.1.2.3, "Understanding Group Spaces"

1.1.2.1 Understanding the Sidebar

The Sidebar provides quick access to tools and information essential to your personal productivity. For example, in the Sidebar you can view notifications sent to you, personal mail messages, documents you've accessed recently, applications that you use frequently, and much more.

Although it is personal, the Sidebar is almost always present and easily accessible from anywhere in the WebCenter Spaces application.

Note: The Sidebar does not appear when all Sidebar task flows are hidden. For more information, see Section 4.4.3, "Hiding and Showing Task Flows in the Sidebar."

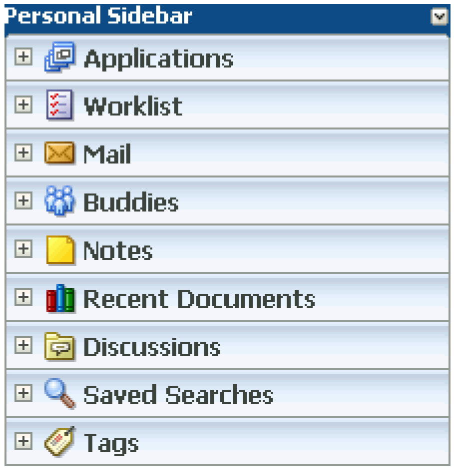
The Sidebar appears in three states: *icon*, *list*, and *hidden*:

- The *icon* state renders the Sidebar as a column of icons (Figure 1–1):

Figure 1–1 The Sidebar Displayed as Icons (Icon)

- The *list* state renders the Sidebar as a list of expandable panels (Figure 1–2).

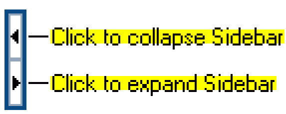
Figure 1–2 The Sidebar Displayed as Expandable Panels (List)



- The *hidden* state hides the Sidebar.

Enter or exit all three states using the **Expand** and **Collapse** icons located to the lower right of the Sidebar (Figure 1–3).

Figure 1–3 Collapse and Expand Sidebar Icons



For more information about the Sidebar, see Section 4.4, "Working with the WebCenter Spaces Sidebar."

1.1.2.2 Understanding Personal Spaces

A personal space provides you with a private work area for storing personal content, keeping notes, viewing and responding to business process assignments, maintaining a list of online buddies, and performing many other tasks relevant to your unique working day. The focus of a personal space is on you and your personal productivity.

Figure 1–4 A Personal Space in a WebCenter Spaces Application

See Also: Advanced users can rename the Personal Space tab. For more information, see the white paper "*Extending WebCenter Spaces (11.1.1.2.0)*" on the Oracle Technology Network: `http://www.oracle.com/technology/products/webcenter/white_papers.html`.

Everything in a personal space is personal: the documents you upload, the notes you write, the pages you create. You can share your personal space with other users, but sharing is entirely up to you. See Section 7.7, "Setting and Revoking Page Access Permissions."

Many of the features offered in a personal space assist you with making changes that affect your personal user experience. These include page creation and an integrated tool set for writing personal notes and viewing and tracking information of particular interest to you. Additionally, your personal space provides useful, on-the-spot communication features, such as instant messaging and mail.

Note: The application administrator has the authority to disable personal spaces in WebCenter Spaces. Should personal spaces be disabled, you cannot compose a new mail message, perform an advanced search, nor create links and browse linked objects. If you think personal spaces have been disabled by mistake, contact your application administrator. For more information, see Section 2.8, "Contacting Your Application Administrator."

For all levels of users, personal spaces provide a rich set of useful features, such as:

- Section 1.1.2.2.1, "Personal Pages"
- Section 1.1.2.2.2, "Business Role Pages"

1.1.2.2.1 Personal Pages Your personal space includes both predefined pages and any personal pages you create. It may also include business role pages and other predefined pages provided by the application administrator.

Default predefined pages include a **Welcome** page and a **Documents** page, where you can upload and manage your personal content. Your application administrator may also provide other predefined pages, such as a getting started page or a personal planner page.

In addition to predefined pages, you can create your own pages and have full privileges over them. With full page privileges, you can add and remove content, share the page with others, delete pages, and show or hide pages using the Manage Pages dialog (for more information, see Chapter 7, "Managing Pages"). Many applications and services are available through WebCenter Spaces to assist you in all of these activities.

> **See Also:** For more information about creating pages, see Chapter 8, "Creating, Editing, and Deleting Pages."

1.1.2.2.2 Business Role Pages Your personal space also displays all pages targeted to your professional role. These are called *business role pages*. A business role page is a page specifically provided for a given role in your organization.

For example, an application administrator can create business role pages targeted to each line of business. When a sales person logs in and goes to his personal space, he'll see the **Sales** business role page. When an engineer logs in and goes to her personal space, she'll see the **Engineering** business role page. Information that is timely and relevant to a specific business role can be provided instantly, without the noise of irrelevant information from other lines of business.

> **See Also:** For more information about business role pages, see the *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter*.

Administrators can create business role pages and manage all personal and business role pages from the WebCenter Spaces administration interface. Administrators can access this interface by clicking the **Administration** link at the top of the WebCenter Spaces application. The **Administration** link appears only to users who have logged in to the application using an administrator user name and password.

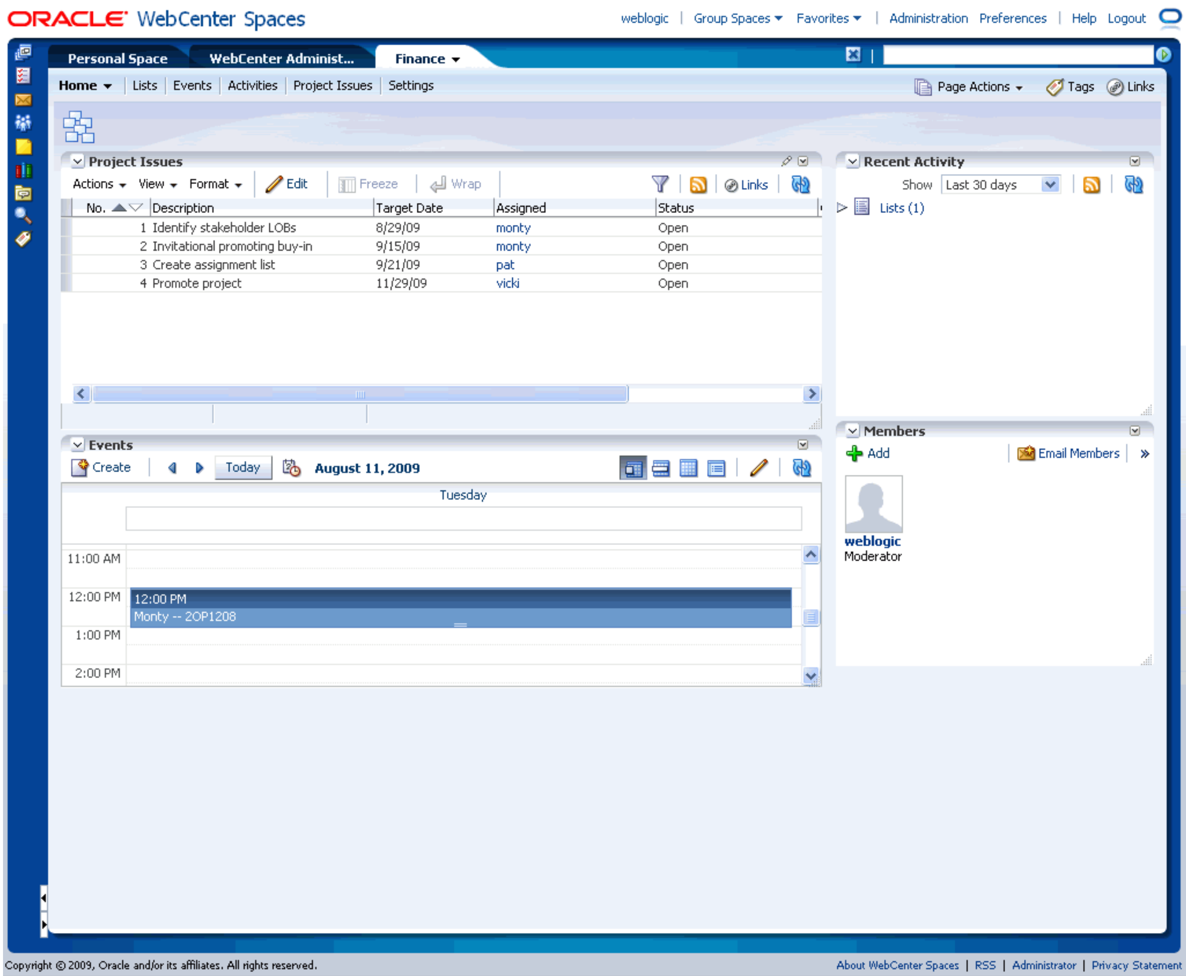
Additional administration interface features include user and role management, service configuration, and Sidebar configuration.

> **See Also:** For more information about administering WebCenter Spaces, see *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter*.

1.1.2.3 Understanding Group Spaces

Group spaces support discrete communities of any size that are organized around an area of interest or a common goal (see Chapter 12, "Understanding Group Space Basics").

Figure 1–5 An Oracle WebCenter Spaces Group Space



You can create a blank group space or create a prepopulated group space using a template. WebCenter Spaces provides templates to suit a wide range of use cases out-of-the-box (for more information, see Chapter 13, "Building Group Spaces"). Additionally, you can create custom templates to fit any use case.

Out-of-the-box group space templates include Group Project, Community of Interest, and Blank. For information about these templates, see Section 13.2, "What You Should Know About Group Space Templates."

You can save duplication of effort by creating templates from your custom group spaces. Creating templates from custom group spaces gives other group space builders a quick start in setting up the support framework for their tasks or projects.

To create a group space template simply create the group space you want to pattern other group spaces after, and save it as a template. Reusing group spaces in this way enables you to get up and running immediately, without losing time duplicating set-up, security, and other group space infrastructure (see Section 13.10, "Creating Your Own Group Space Templates").

Where personal spaces are personal, group spaces support the formation and collaboration of project teams and communities that support shared interest in a given topic. Group spaces provide a virtual environment for ongoing interaction and information sharing—in essence, an environment for forming a social network.

Structurally, group spaces are comprised of pages, many of which are dedicated to a particular service. For example, a **Documents** page provides a central library for uploading, organizing, and managing group content (see Chapter 18, "Working with the Documents Service"). A **Lists** page provides the means of creating and publishing lists (Chapter 22, "Working with the Lists Service"). A **Search** page includes features for saving searches and managing search results (Chapter 28, "Working with the Search Service").

In addition to these and other default pages, a group space supports custom pages created by authorized users. Page creation is easy with a wide selection of predefined layouts. With little effort, you can provide pages neatly tailored to the unique needs of your team or community (for more information, see Chapter 8, "Creating, Editing, and Deleting Pages").

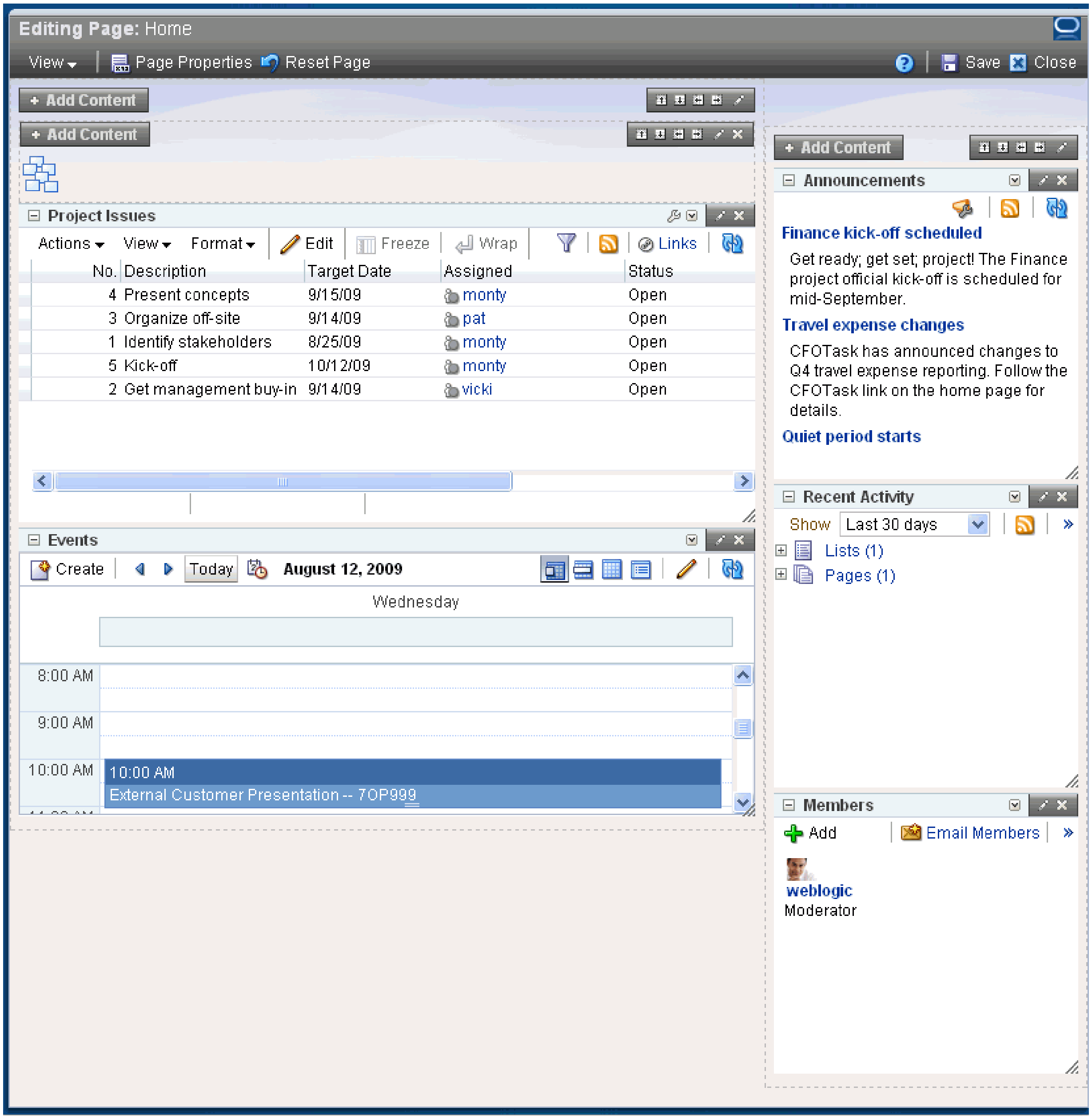
Group space administration is fully integrated into the WebCenter Spaces environment. For example, the person who creates a group space is automatically that group space's moderator, and can grant any other user Moderator privileges. Users assigned the `Moderator` or equivalent role can add or remove group space members; invite new members; provide and update group space metadata, such as the group space display name, description, and search keywords; and manage the services available to the group space. Additionally, a moderator can configure a group space to allow self-registration of new members. Interested persons can navigate to the group space and fill out a preseeded self-registration form (see Chapter 15, "Managing Group Space Members and Roles").

For more information about group spaces, see Part III, "Working with WebCenter Spaces Group Spaces".

1.1.3 Understanding Oracle Composer

Enterprise mashups come to life in Oracle Composer (Figure 1–6), where you can add content to a page, define page properties, and extend and customize application views, called *task flows* (for more information about task flows, see Section 1.2, "Introducing WebCenter Services"). Use Oracle Composer to add multiple task flows to a page, access task flow properties, and wire pages and task flows to each other to create context-sensitive mashups.

Figure 1–6 A Group Space Home Page Opened in Oracle Composer



When you first create a page, it opens in Oracle Composer. After creation, you can modify the page by changing its layout, rearranging its content through drag and drop, and editing content in-place.

Note: Whether or not page content is editable is determined when the content is developed. For example, if a task flow is editable, an **Edit** icon appears on the task flow's header or when you move your mouse pointer over the task flow. If a task flow is not editable, no **Edit** icon appears.

See Also: For more information about Oracle Composer, see Chapter 6, "Understanding the Page Service and Oracle Composer."

1.2 Introducing WebCenter Services

WebCenter applications expose collaborative, social networking, and personal productivity features through *services*, which, in turn, expose subsets of their features and functionality through *task flows*.

All services provide a wide variety of functionality in support of personal and team objectives. For example, a Documents service provides features for uploading and managing content. A Discussions service provides features for creating, managing, and participating in discussion forums.

Table 1–1 lists the services available to WebCenter application—both WebCenter Spaces and custom WebCenter applications. **Availability** indicates whether a service is offered in WebCenter Spaces alone or in both WebCenter Spaces and custom WebCenter applications (both).

Table 1–1 Oracle WebCenter Services

Service	Availability	Description	For More Information
Announcements	Both	Provides a means of posting announcements about important activities and events to members of a given group space.	Chapter 16, "Working with the Announcements Service"
Discussions	Both	Provides a means of creating threaded discussions, posting and responding to questions, and searching for answers—all within the context of a group space. Also provides an effective group communication mechanism for important activities and events.	Chapter 17, "Working with the Discussions Service"
Documents	Both	Provides content management and storage capabilities, including content upload, file and folder creation and management, file check out, versioning, and so on.	Chapter 18, "Working with the Documents Service"
Events	WebCenter Spaces only	Provides a means of creating and maintaining a schedule of events relevant to a wider group of users. Events are published to all members of a group space.	Chapter 19, "Working with the Events Service"
Instant Messaging and Presence (IMP)	Both	Provides a means of observing the status of other authenticated users (whether online, offline, busy, or idle) and contacting them instantly.	Chapter 20, "Working with the Instant Messaging and Presence Service (IMP)"
Links	Both	Provides viewing, accessing, and associating related information; for example you can link to a solution document from a discussion thread.	Chapter 21, "Working with the Links Service"

Table 1–1 (Cont.) Oracle WebCenter Services

Service	Availability	Description	For More Information
Lists	WebCenter Spaces only	Provides the ability to create, publish, and manage lists. Users can create lists from prebuilt structures or create their own custom lists.	Chapter 22, "Working with the Lists Service"
Mail	Both	Provides easy integration with IMAP and SMTP mail servers to enable users to perform simple mail functions such as viewing, reading, creating, and deleting messages, creating messages with attachments, and replying to or forwarding existing messages.	Chapter 23, "Working with the Mail Service"
Notes	WebCenter Spaces only	Provides the ability to "jot down" and retain quick bits of personally relevant information.	Chapter 24, "Working with the Notes Service"
People Connections	Both	Provides a means of connecting, interacting, and keeping track of other users through social networking applications, such as Message Board, Feedback, Profile, and Activity Stream.	Chapter 25, "Working with the People Connections Service"
Recent Activities	Both	Provides a summary view of recent changes to pages, documents, discussions, announcements, lists, and events.	Chapter 27, "Working with the Recent Activities Service"
RSS	Both[1]	Provides a means of accessing the content of many different web sites from a single location—a news reader.	Chapter 26, "Working with the RSS Service"
Search	Both	Provides a means of searching tags, services, the application, or an entire site. This includes integrating Oracle Secure Enterprise Search for WebCenter searches.	Chapter 28, "Working with the Search Service"
Tags	Both	Provides a means of assigning one or more personally relevant keywords to a given page or document.	Chapter 29, "Working with the Tags Service"
Wikis and Blogs	Both	Provides easy integration of blogs and wiki pages within your application. Provide wiki pages within group spaces. Provide blogs within both personal and group spaces.	Chapter 30, "Working with Wikis and Blogs"
Worklist	Both	Provides a means of viewing notifications from the various workflows established in your enterprise.	Chapter 31, "Working with the Worklist Service"

[1] The RSS Viewer task flow is available in both WebCenter Spaces and custom WebCenter applications. RSS news feeds are available from WebCenter Spaces only.

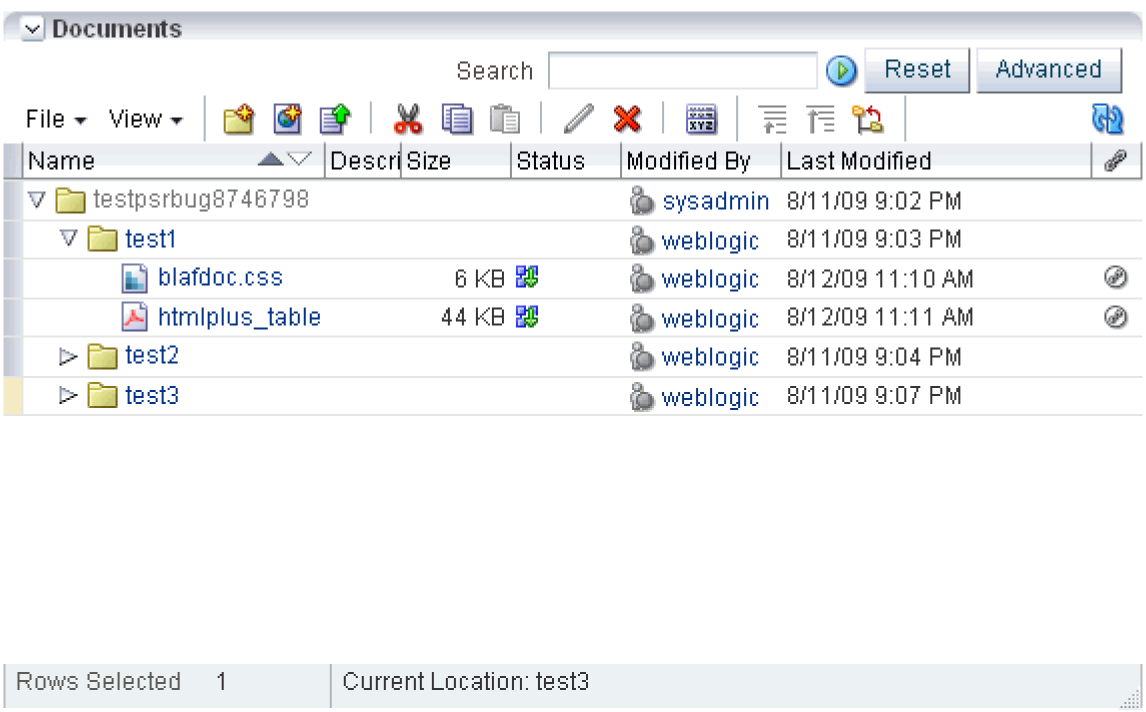
A task flow is a reusable piece of functionality that may expose all or a subset of the features available from a particular service. For example, a *Recent Documents* task flow provides a view of all documents that have recently been opened, added, or affected in some way (Figure 1–7).

Figure 1–7 Recent Documents Task Flow

Users can open documents by clicking the document name in the task flow. The Recent Documents task flow provides a narrow subset of the functionality offered through the Documents service.

In contrast, the Documents service also provides the *Documents* task flow (Figure 1–8).

Figure 1–8 Documents Task Flow



The Documents task flow fully exposes all features and benefits of the Documents service.

In the WebCenter Spaces application, task flows provide a scoped view of your information. That is, personal and group spaces expose content that is unique to a given space. For example, imagine a WebCenter Spaces application that includes a *Finance* group space and a *Photography* group space. The Documents task flow in the Finance group space displays only the documents and folders associated with the Finance group space. The same Documents task flow displays a completely different set of documents and folders when it is exposed in the Photography group space. Within the WebCenter Spaces application, many task flows respond to scope automatically, without users having to configure that information for themselves.

Many task flows provide configuration parameters that enable you to further customize the appearance and content of a task flow instance. This includes such customizations as controlling the look and feel of the presentation elements surrounding the task flow (that is, task flow *chrome*) and limiting the sources from which task flow content is rendered.

> **See Also:** Advanced users can expose WebCenter services task flows as portlets and pagelets and reuse them in other Oracle applications. Advanced users can also customize WebCenter services task flows.
>
> For more information, see the white papers, "*Exposing WebCenter Services Task Flows as WSRP Portlets and Ensemble Pagelets*," and "*WebCenter Task Flow Customization*," on the Oracle Technology Network:
> `http://www.oracle.com/technology/products/webcenter/white_papers.html`.

1.3 A Day in the Life of WebCenter

Now that you've had a look at the features and benefits of WebCenter Spaces, let's visit a typical user.

Lillian Regan is a Product Manager at OurCompany, Inc. She frequently interacts with all lines of business (LOB) to keep tabs on product development and the contributions from supporting groups, such as Quality Assurance, Marketing, Sales, and Documentation. Lillian is currently managing the OurProject effort.

In her WebCenter application, Lillian created the OurProject group space and invited representatives from each LOB to join. She set up the document library with a project plan folder, which in turn contained folders for project designs, functional specifications, collateral reviews, and other project-related documents. She added a Members task flow to the group space home page so all members had a continuously refreshed view of, and easy access to, other project participants.

Lillian created a list of project deliverables and linked each list row to the deliverable's associated plan, design, and specification documents. She posted the list on the OurProject home page along with a list view of the project plan folder.

Lillian had some ideas to present to the group. She created the OurProject discussion forum and posted an Ideas topic, asking for comments. Eager to know when responses came in, Lillian made Ideas one of her Watched Topics.

A short time later, Lillian checked the Sidebar for activity on her watched discussion topics, and noticed new replies. In his reply to Lillian's post, Bob Smith had an excellent suggestion for incorporating her ideas in half the time originally estimated. Lillian clicked Bob's user name, conveniently displayed next to his reply, and started an instant message session. They agreed to meet to discuss details that afternoon.

Lillian opened the Events page in the OurProject group space and scheduled the meeting, sending Bob notice of where and when on the spot.

That afternoon, Lillian and Bob met to hash out the details of his suggestions. Lillian kept notes on the group space wiki page, and sent Bob a link to this when she was done. During the meeting, Bob mentioned his participation in the upcoming trade show. This reminded Lillian that she must also prepare for that show.

In the Sidebar, Lillian made a note to herself to preorder take-away items for the upcoming trade show. Earlier, Nalah Bhedi told Lillian she had uploaded the take-away catalog to their group space **Documents** page. Lillian didn't know the exact location, so she searched the page for "take-away." No luck. She searched again against Nalah's user name and found it right away. On the **Documents** page, she tagged the document "take-away" to make it easy to find the next time.

The Secure Enterprise Search portion of the results also included company guidelines on budgets and volume for trade-show take-away items. This spared Lillian the embarrassment of ordering goods outside of the guidelines. She saved the search to ensure she could readily find this document again.

Lillian created an announcement listing her three top picks for take-away items, and invited team members to contact her with their preferred selection. At the end of the day, armed with their responses, Lillian opened the Applications pane in the Sidebar and launched her company's procurement software. She placed her order, and then posted an announcement about her decision. She checked her Workflow pane in the Sidebar and opened a notification about the successful delivery of her purchase order to the Procurement order entry system.

Recalling Bob's quick response and excellent ideas, Lillian opened his Feedback task flow and posted a message of praise and thanks. She opened Nalah's Message Board and thanked her for the information about the take-away catalog.

Satisfied with her productive day, Lillian logged out and left to join her friends for dinner.

2 Learning Your Way Around

This chapter provides basic information to get you started using the WebCenter Spaces application. It includes the following sections:

- Section 2.1, "Registering Yourself with WebCenter Spaces"
- Section 2.2, "Logging In and Out of WebCenter Spaces"
- Section 2.3, "Getting to Know Your Personal Space"
- Section 2.4, "Viewing Your Personal Profile Gallery"
- Section 2.5, "Hiding, Showing, Opening, and Closing Pages"
- Section 2.6, "Initiating Actions from Tabs"
- Section 2.7, "Accessing WebCenter Spaces Online Help"
- Section 2.8, "Contacting Your Application Administrator"

Audience

This chapter is intended for users who want to understand basic information about WebCenter Spaces self-registration, log in, personal space, page access, and online help.

2.1 Registering Yourself with WebCenter Spaces

Your WebCenter Spaces administrator may provide the opportunity to self-register to WebCenter Spaces. Self-registration enables you to create your own login credentials and enter WebCenter Spaces from there forward as an authenticated user. The privileges of authentication are many: your own personal space, access to other features based on your assigned user role, a broader range of available interactive features.

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

To register yourself as a WebCenter Spaces user:

1. Open the WebCenter Spaces application.

   For example:

   ```
   http://<host>:<port>/webcenter
   ```

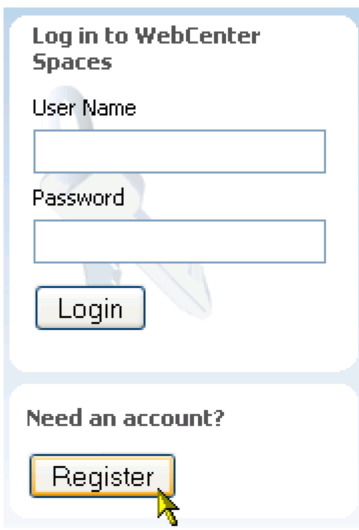
Where <host>:<port> refers to the host name and port number of the system where Oracle WebCenter is installed. By default, Oracle WebCenter is installed on port 8888.

2. Click the **Register** button on the application **Welcome** page (Figure 2–1).

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

> **See Also:** Advanced users can extend WebCenter Spaces by customizing the public application Welcome page, where the Login dialog appears. For more information, see the white paper, "*Extending WebCenter Spaces (11.1.1.2.0)*" on the Oracle Technology Network: `http://www.oracle.com/technology/products/webcenter/white_papers.html`.

Figure 2–1 The Register Button on the Welcome Page



3. On the resulting **Self-Registration** page (Figure 2–2), enter your user information:

Note that fields marked with an asterisk require a value.

Figure 2–2 WebCenter Spaces Self-Registration Page

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

Note: The user name policy is set by the underlying identity store. Your application administrator may customize the Self-Registration page to include information that explains your organization's user name policy.

---

b. Click the **Check User Name Available** 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.

Note: The password policy is set by the underlying identity store. Your application administrator may customize the Self-Registration page to include information that explains your organization's password policy.

---

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 Spaces.

Note: 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 application administrator has configured public mail credentials.

2.2 Logging In and Out of WebCenter Spaces

This section describes how to log in and out of WebCenter Spaces. It makes some assumptions about, for example, the placement of **Login** and **Logout** links in the application user interface.

This section includes the following subsections:

- Section 2.2.1, "Logging In to WebCenter Spaces"
- Section 2.2.2, "Logging Out of WebCenter Spaces"

2.2.1 Logging In to WebCenter Spaces

Some pages are public, and therefore available to users who are not logged in. But to take advantage of your user role assignment and the access that flows from that, you must log in. Logging in makes you an authenticated user. Authenticated users have a greater level of access to application pages and features.

Note: WebCenter Spaces does not support single-user concurrency. That is, one user cannot log in to the same application at the same time more than once.

To log in to WebCenter Spaces:

1. Using your Web browser, navigate to your WebCenter Spaces application.
2. Click the **Login** link in the upper right corner of the application.
3. On the **Login** page, enter your user name in the **User Name** field and your password in the **Password** field.
4. Click the **Login** button, or press **Enter**.

   The application opens on the last page you accessed.

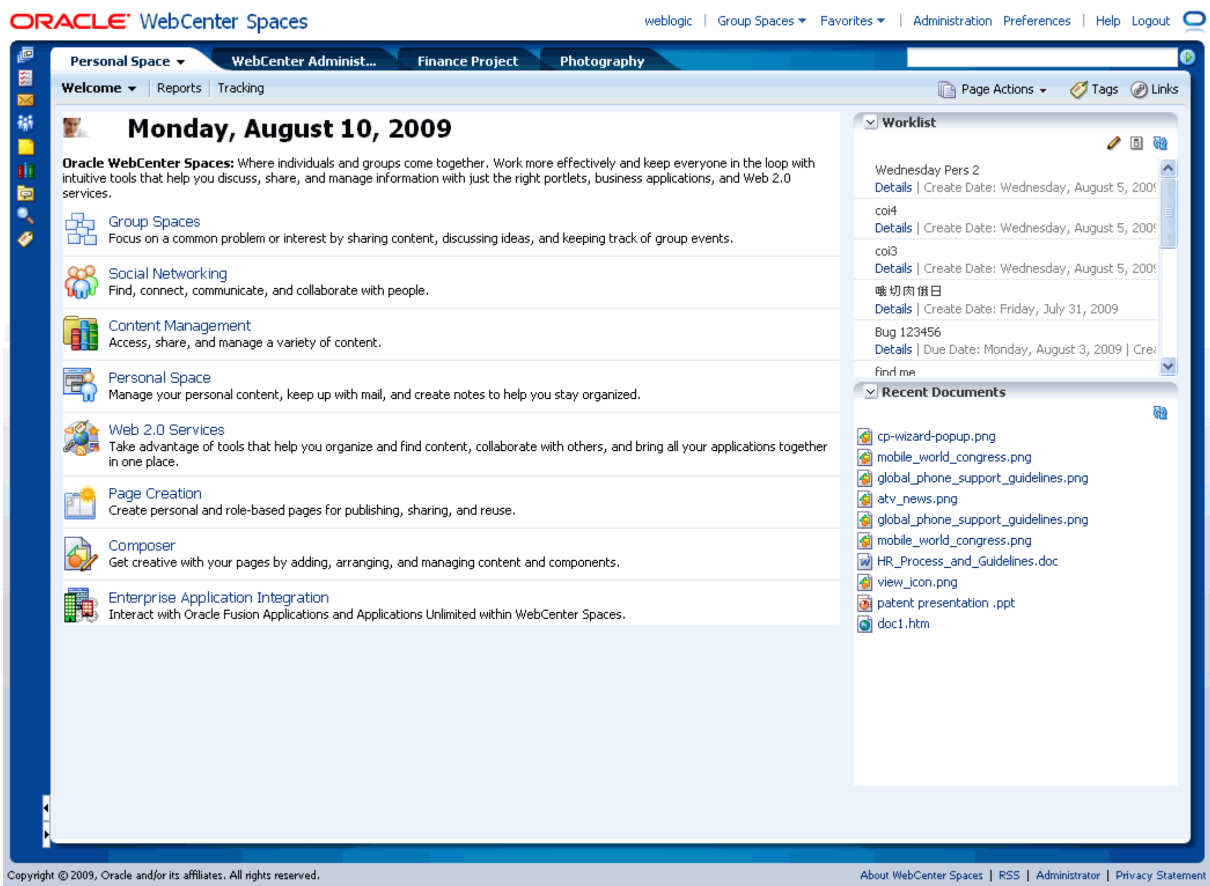
2.2.2 Logging Out of WebCenter Spaces

To log out of a WebCenter application, click the **Logout** link at the top of the application.

2.3 Getting to Know Your Personal Space

If you have log-in credentials for the WebCenter Spaces application, you also have your own *personal space* (Figure 2–3).

Figure 2–3 A Personal Space in a WebCenter Spaces Application



In your personal space, you have all the privileges of an owner. That is, you can view, add, edit, and delete personal pages and content. Additionally, you can grant the same kinds of access to other users.

Note: A WebCenter Spaces administrator can view, add, edit, and delete any pages and content in the application.

In Figure 2–3, The tab **Personal Space** identifies this as a personal space. Your personal space is easy to find because its tab is always on view (unless a page is in edit mode or a group space is configured to appear in full screen mode, see Section 13.8.5, "Applying a Group Space Site Template"). Your personal space may not always be foremost when you log in—that distinction is reserved for the last top-level tab you accessed—whether your personal space, a group space, or a dynamically generated top-level tab. But your personal space is always available (except as noted), and you can click it to bring your personal space forward.

See Also: Advanced users can rename the Personal Space tab. For more information, see the white paper, "*Extending WebCenter Spaces (11.1.1.2.0)*" on the Oracle Technology Network: `http://www.oracle.com/technology/products/webcenter/white_papers.html`.

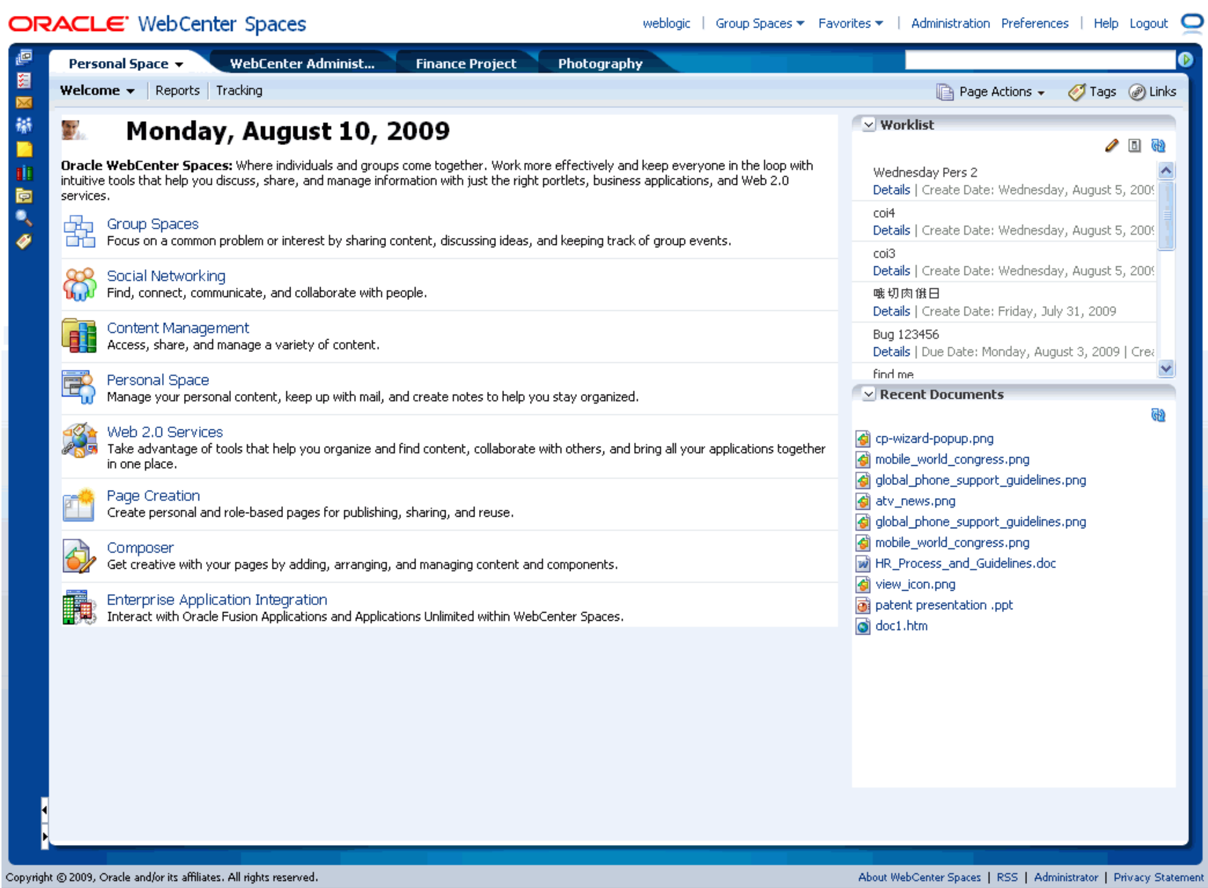
Your personal space contains the personal pages you create and other content determined by your application administrator. A typical personal space provides a **Welcome** page and a **Documents** page.

Additionally, your application administrator may have added business role pages that are targeted to your particular line of business. For example, if you are on the sales force, you may have a **Sales Force** business role page in your personal space that displays content relevant to you and other sales people in your organization.

Active tabs display a downward arrow icon, which you click to access page actions. Access the menu on inactive tabs by right-clicking the tab.

For example, in Figure 2–4, both **Personal Space** and **Welcome** are active, in that they are both foremost in the application view. Note the downward arrow icons on both tabs.

Figure 2–4 A Personal Space in a WebCenter Spaces Application

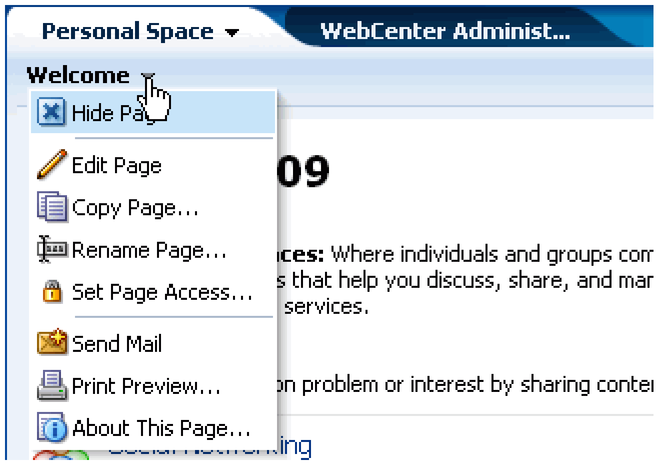


For a *personal space*, this menu provides the option to close all other top-level tabs (Figure 2–5).

Figure 2–5 Menu on an Active Personal Space

For a *page* in a personal space, this menu provides access to page actions (Figure 2–6).

Figure 2–6 Menu on an Active Tab



A page menu can include such actions as **Hide Page**, **Edit Page**, **Copy Page**, **Rename Page**, **Set Page Access**, **Delete Page**, **Send Mail**, **Print Preview**, and **About This Page** (for information about these actions, see Section 2.6, "Initiating Actions from Tabs").

The options that display on the page actions menu vary according to the type of page you are viewing and the permissions you have on that page. For example, most users cannot edit or rename default pages, such as **Welcome** and **Documents**, nor business role pages. However you can edit, rename, and set access on any page that you create in your personal space.

2.4 Viewing Your Personal Profile Gallery

When you first access the WebCenter Spaces application, you may notice a top-level tab next to your personal space that is labeled with your user name. This is your personal profile gallery (Figure 2–7).

Figure 2–7 A Personal Profile Gallery

Your personal profile gallery presents six subtabs, each devoted to a particular feature of the People Connections service (for more information, see Chapter 25, "Working with the People Connections Service"):

- **Gallery** provides a quick view of a task flow from each People Connections feature.
- **Message Board** provides a means of viewing messages other users have left for you.
- **Activity Stream** provides a means of keeping track of the application and social networking activities of your connections.
- **Connections** provides a means of connecting to other users, tools for managing those connections, and quick access to information about your connections.
- **Feedback** provides a means of viewing feedback messages you have posted and received.
- **Profile** provides a view of your personal profile, including contact information, a status message, your job, your manager, and the like.

Click your user name at the top of the application to navigate to the **Gallery** tab of your personal profile gallery page. Except when a group space is shown in full-screen mode (for more information, see Section 13.8.5, "Applying a Group Space Site Template"), your personal profile gallery page is always available.

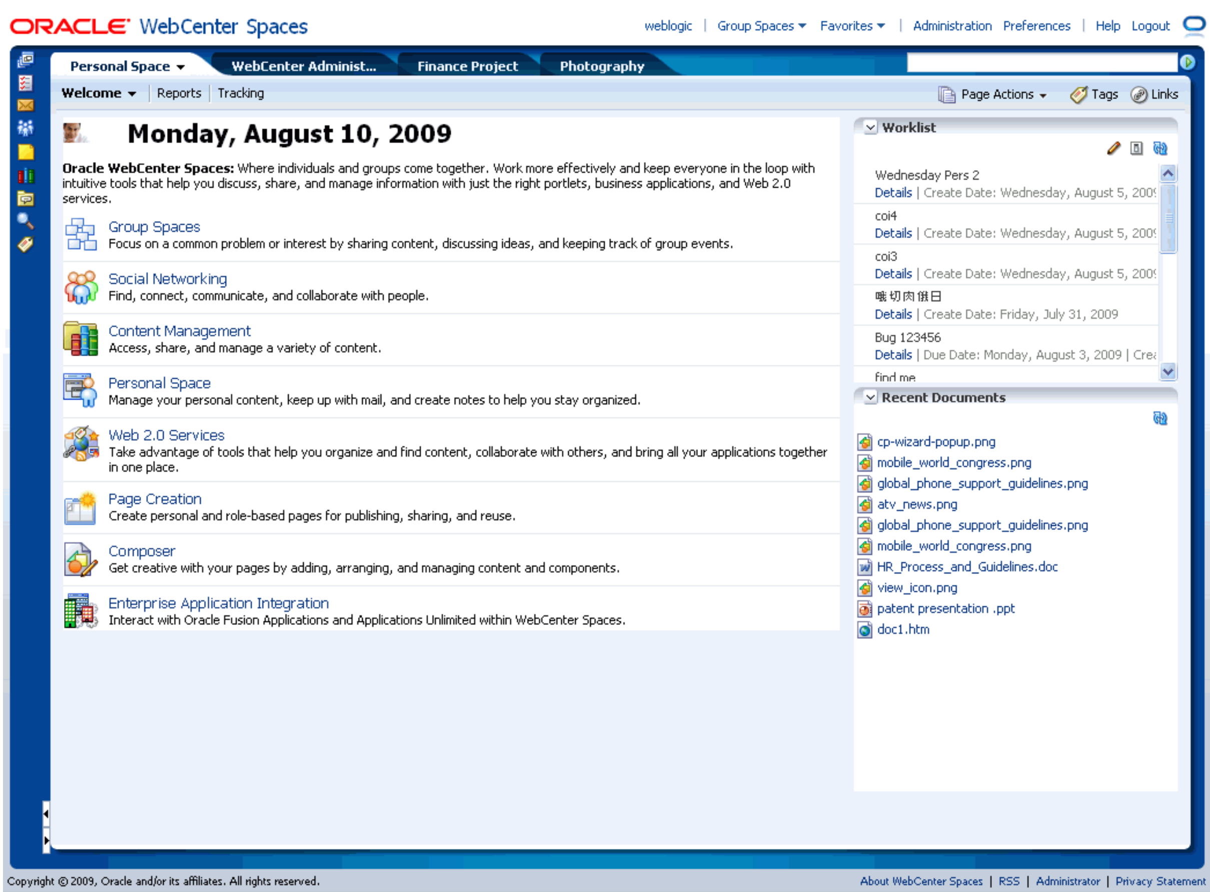
> **See Also:** For information about using the People Connections task flows, see Chapter 25, "Working with the People Connections Service."

2.5 Hiding, Showing, Opening, and Closing Pages

In a default installation, all WebCenter Spaces personal and group spaces are rendered as top-level tabs and all pages are rendered as subtabs. For example, in Figure 2–8 the **Personal Space** tab is a top-level tab, and its pages are subtabs.

> **Accessibility Note:** When you select a link in a WebCenter Spaces application, the active cursor does not automatically move to the content area in new non-popup/popover pages. To move your cursor to the new content area, manually tab over to it.

Figure 2–8 Pages in a Personal Space



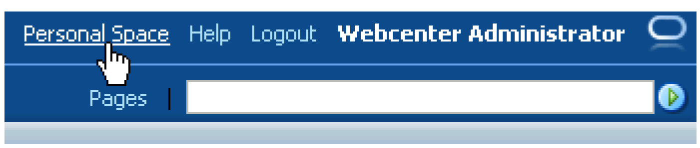
> **Note:** It is possible that your WebCenter application is configured to show one or all group spaces in full-screen mode. When this is the case, a group space's pages are shown as top-level tabs. For more information, see Section 13.8.5, "Applying a Group Space Site Template."

Additionally, some services provide dynamically-generated pages that are rendered as top-level tabs. For example, a global search generates a top-level tab for its search results. The Tags service provides a dynamically-generated Tag Center, which also displays as a top-level tab. The Profile Viewer, which opens when you view your own or another user's profile, displays as a top-level tab.

Though you cannot close or hide a personal space, you can hide the pages in a personal space using either the page's actions menu or the **Show Page** checkbox in WebCenter Spaces Manage Pages dialog. You can hide and show all group spaces, group space pages, and dynamically-generated top-level tabs in your own application view.

Note: Though you cannot actively hide a personal space, your personal space may be hidden when there are so many open group spaces and dynamic, top-level tabs that your personal space is not visible. When your personal space is hidden, you can access it by clicking the double arrows to the left of the top-level tab, and selecting **Personal Space** from the resulting menu.

When a group space is configured to appear in full screen mode., you can access your personal space by clicking the **Personal Space** link at the top of the application.



Showing and hiding tabs and pages is a *personalization* in that such changes affect only your view of the application. Pages and tabs are not simultaneously shown or hidden in other users' application views.

This section describes how to open, hide, and show pages, and how to close dynamically generated pages. It contains the following subsections:

- Section 2.5.1, "Opening Pages"
- Section 2.5.2, "Hiding Pages"
- Section 2.5.3, "Showing Hidden Pages"
- Section 2.5.4, "Opening Group Spaces"
- Section 2.5.5, "Closing Group Spaces and Other Top-Level Tabs"

2.5.1 Opening Pages

There are a few ways to open a page. You can click its tab to bring it forward. If its tab is not shown, the page may be hidden or so many other tabs may be shown that the page you want—though available—is not currently shown.

This section describes how to open pages through the Manage Pages dialog and through a dynamic icon that appears when a page is open but hidden. It contains the following subsections:

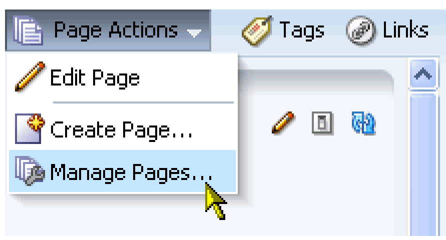
- Section 2.5.1.1, "Opening Pages Through the Manage Pages Dialog"
- Section 2.5.1.2, "Accessing Pages that Are Open But Hidden"

2.5.1.1 Opening Pages Through the Manage Pages Dialog

Within a given personal or group space, you can open hidden pages through the Manage Pages dialog.

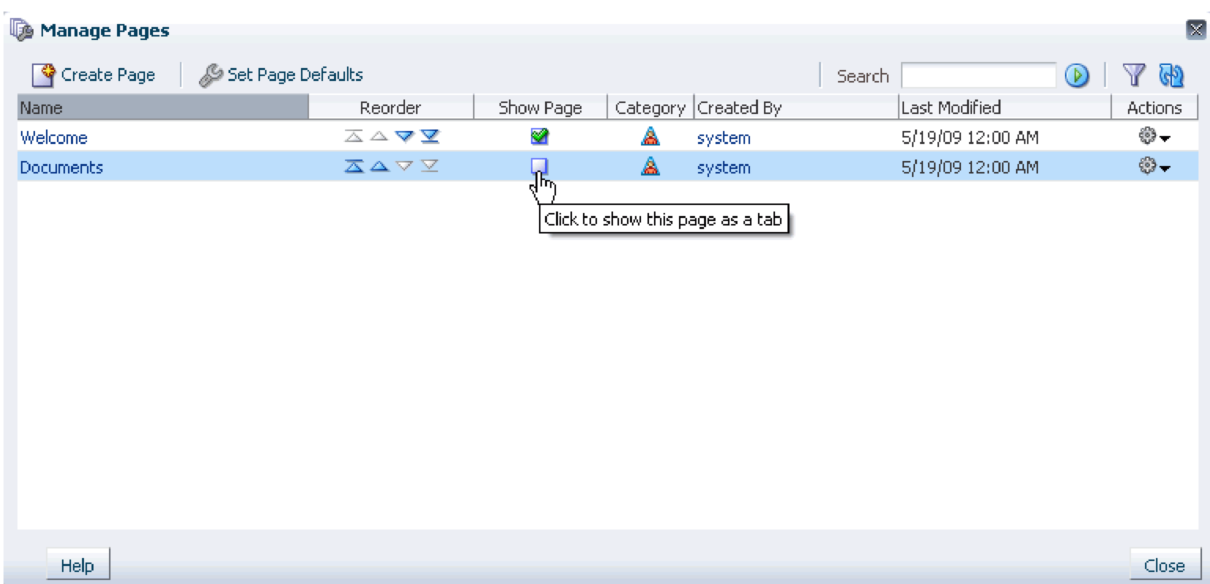
1. Log in, and select the **Manage Pages** command on the **Page Actions** menu (Figure 2–9).

Figure 2–9 The Manage Pages Command



2. In the resulting Manage Pages dialog, select the **Show Page** checkbox next to the page you want to open (Figure 2–10).

Figure 2–10 Show Page Checkboxes in the Manage Pages Dialog



For more information, see Section 2.5.3, "Showing Hidden Pages."

> **See Also:** To learn more about the Manage Pages dialog, see Chapter 7, "Managing Pages."

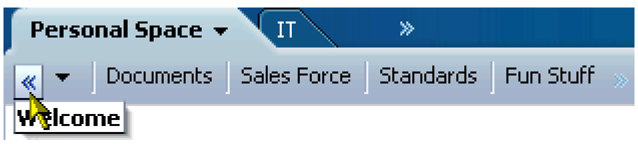
2.5.1.2 Accessing Pages that Are Open But Hidden

When so many tabs are displayed that you cannot see the page you want, dynamically-rendered icons appear, enabling you to select open-but-hidden pages from a pick list. This section describes how.

To access open-but-hidden pages:

1. Log in, and click the **Previous Page** or **Next Page** icons (Figure 2–11).

Figure 2–11 Previous Page Icon and Resulting Page List



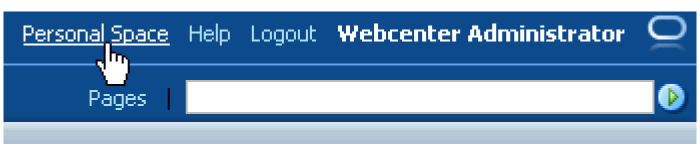
2. Select the page you want to view from the resulting pick list.

   In Figure 2–11, the page that appears on the pick list is the **Welcome** page.

The **Previous Page** and **Next Page** icons appear dynamically, as needed.

A group space may be configured to open in full-screen mode. In such a case, click the **Personal Space** link at the top of the application to go to your personal space (Figure 2–12).

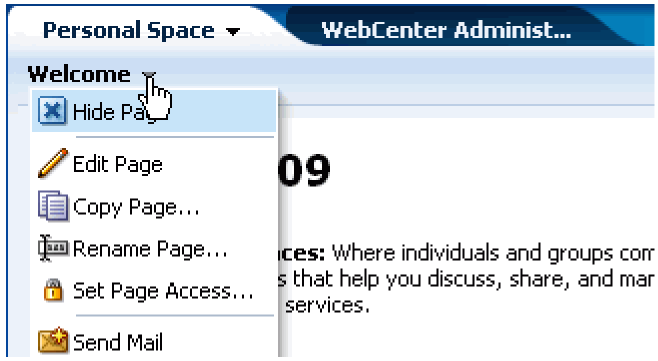
Figure 2–12 Personal Space Link in the WebCenter Spaces Application



2.5.2 Hiding Pages

As you add pages to your personal space, it may become useful to hide some less-frequently-used pages. Once a page is hidden, it is easy to restore it to view (see Section 2.5.3, "Showing Hidden Pages").

Note: Active pages provide access to an actions menu that includes a shortcut for hiding pages.

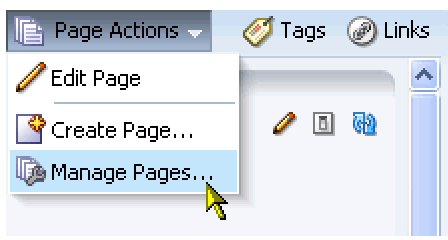


For more information, see Section 2.6, "Initiating Actions from Tabs."

To hide a page:

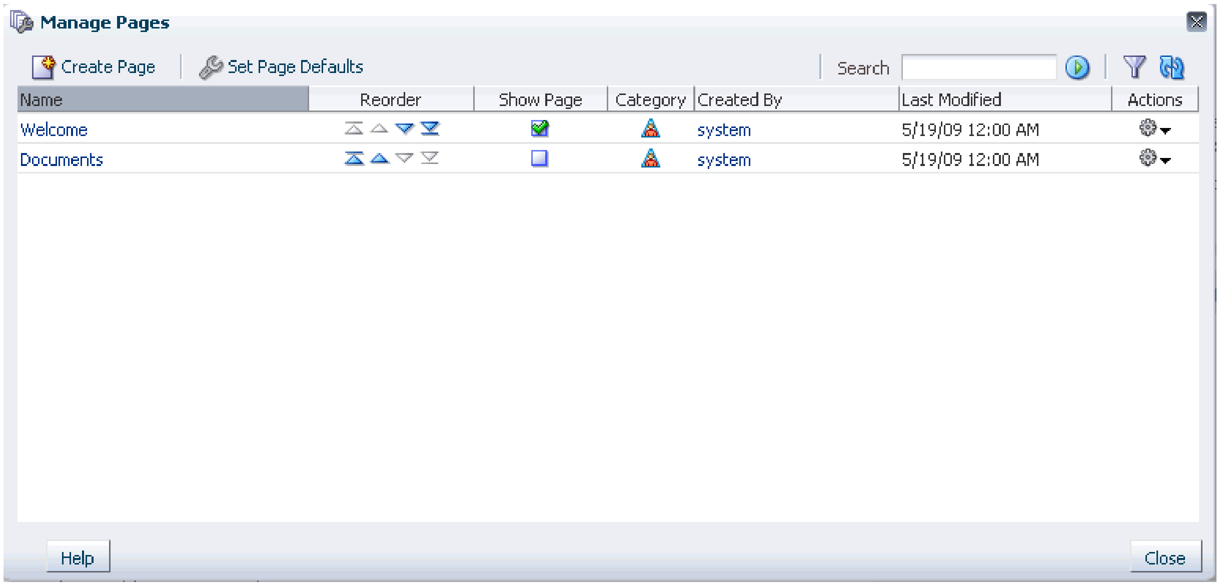
1. Log in, and click your **Personal Space** tab or a group space tab to bring it forward.
2. Select the **Manage Pages** command from the **Page Actions** menu (Figure 2–13).

Figure 2–13 The Manage Pages Command



The Manage Pages dialog opens (Figure 2–14).

Figure 2–14 The Manage Pages Dialog



3. In the Manage Pages dialog, go to the page you want to hide and clear its **Show Page** checkbox.

> **Note:** If you clear the **Show Page** checkbox for the current page, the Manage Pages dialog closes and the current page is hidden.
>
> Within a particular scope, such as a personal or group space, one page must always be shown; therefore, you cannot hide all pages within a particular scope.

4. Click the **Close** button to exit the Manage Pages dialog.

   The page is now hidden.

   See Also: To learn more about the Manage Pages dialog, see Chapter 7, "Managing Pages."

2.5.3 Showing Hidden Pages

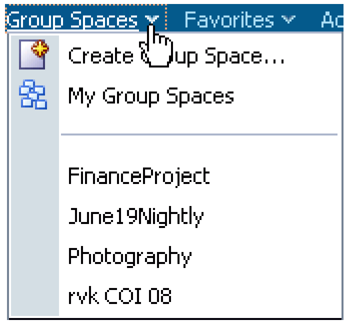
To show a hidden page, you can follow the same process as you would to open a page. For more information, see Section 2.5.1, "Opening Pages."

2.5.4 Opening Group Spaces

To open a group space:

1. Log in, and open the **Group Spaces** menu at the top of the application (Figure 2–15).

Figure 2–15 The Group Spaces Menu



2. Select the group space you want to open.

   The group space opens as a top-level application tab.

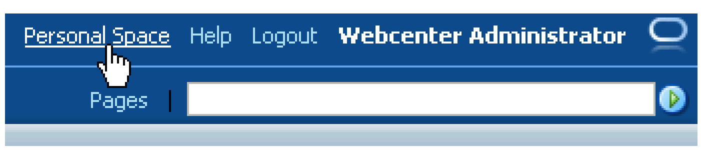
> **See Also:** Another way to open a group space is to click its display name on the **My Group Spaces** page (for more information, see Section 12.2, "Viewing Available Group Spaces"). For more information about group spaces, see Part III, "Working with WebCenter Spaces Group Spaces"

2.5.5 Closing Group Spaces and Other Top-Level Tabs

Group spaces and dynamically-generated pages (that is, top-level tabs) do not appear in the Manage Pages dialog, so you'll need an alternate way to close them. This section tells you how.

Note that some group spaces may be configured to open in full-screen mode. In such cases, you cannot close them so much as navigate away from them. You can navigate away from a group space that is displayed in full-screen mode by clicking the **Personal Space** link at the top of the application (Figure 2–16).

Figure 2–16 Personal Space Link in the WebCenter Spaces Application

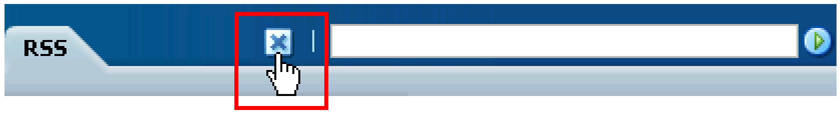


Doing so takes you to your own personal space. From there, you can select another group space from the **Group Spaces** menu at the top of the application.

To close a top-level tab:

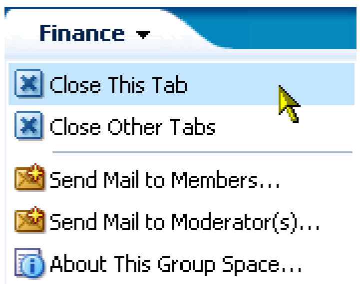
1. If necessary, click the top-level tab to bring it forward.
2. Click the **Close currently selected tab** icon to the far right of all tabs (Figure 2–17).

Figure 2–17 The Close Button



Another way to close a top-level tab is to select the **Close This Tab** or the **Close Other Tabs** option from the group space's actions menu (Figure 2–18).

Figure 2–18 A Group Space's Actions Menu



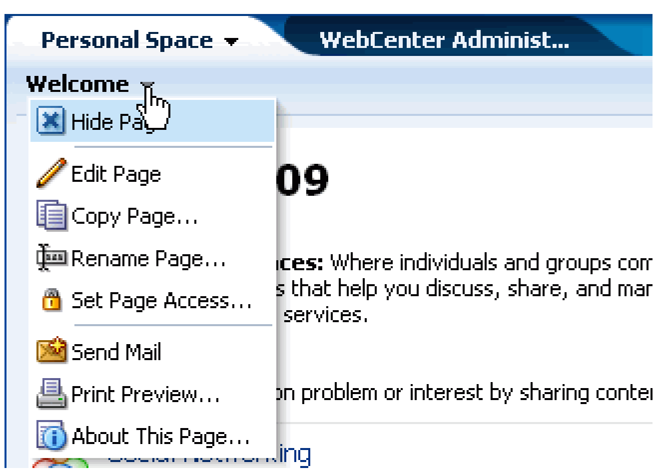
The **Close Other Tabs** option closes all top-level tabs except the current tab and the **Personal Space** tab.

> **See Also:** Group spaces are discussed in detail in Part III, "Working with WebCenter Spaces Group Spaces". For information about closing a group space for all users, see Section 14.6, "Closing a Group Space."

2.6 Initiating Actions from Tabs

Personal space, group space, and pages all provide access to a shortcut menu with options for performing actions on the associated page. To open the actions menu, click the menu icon on an active tab or right-click an inactive tab (Figure 2–19).

Figure 2–19 Actions Menu on a Personal Space Welcome Page



Most of the actions provided on space and page actions menus are described in other chapters in this guide. This section steps you through those options that are not described elsewhere. It contains the following subsections:

- Section 2.6.1, "What You Should Know About the Page Actions Menu"
- Section 2.6.2, "Accessing a Space or Page Actions Menu"
- Section 2.6.3, "Sending a Message to Group Space Members or Moderators"
- Section 2.6.4, "Exposing a Group Space Page in Your Personal Space"
- Section 2.6.5, "Renaming a Page"
- Section 2.6.6, "Sending a Link to a Page"
- Section 2.6.7, "Previewing and Printing an Application Page"
- Section 2.6.8, "Viewing Space and Page Information"
- Section 2.6.9, "Obtaining a Group Space's Internal ID or a Group Space or Page's Direct URL"

Note: The options offered on page actions menus

2.6.1 What You Should Know About the Page Actions Menu

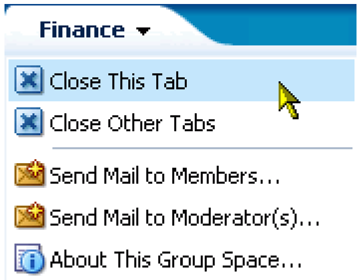
You can access an actions menu on page and personal and group space tabs by clicking the downward arrow icon on active tabs and by right-clicking inactive tabs.

The menu that renders for top-level tabs differs from the one that renders for pages. Additionally, the options presented on the menu for one type of top-level tab differs from the options presented on another type. For example, a personal space actions menu simply provides the **Close Other Tabs** option (Figure 2–20).

Figure 2–20 Menu on an Active Personal Space

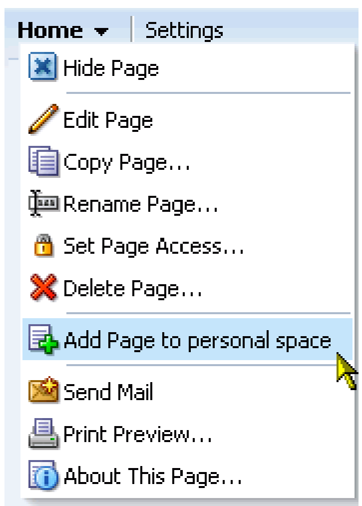
A group space actions menu provides more options, including options to close the group space, to close all top-level tabs (except the current group space and the personal space), to send mail to the group space's members or moderator(s), and to view information about the current group space (Figure 2–21).

Figure 2–21 Menu on an Active Group Space



The actions that appear on page menus depend on whether the page is in a personal or group space and on the privileges you have on the page. For example, Figure 2–22 shows an actions menu on a page in a group space. Notice the option **Add Page to personal space**. This appears only on group space page actions menus.

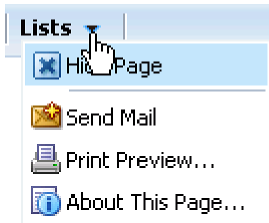
Figure 2–22 Menu on an Active Group Space Page



Group space, personal space, and page actions menu icons appear only on active personal and group spaces and pages—that is, the actions menu icon appears on only the space and page that are currently forward. You can access the actions menu from inactive tabs by right-clicking the tab.

The actions menus on out-of-the-box service pages, such as **Announcements**, **Documents**, **Lists**, and so on, provide access to options for hiding the page, sending a link to the page through mail, previewing a print version of the page, and viewing information about the page (Figure 2–23).

Figure 2–23 Actions Menu Options on Out-of-the-Box Service Pages



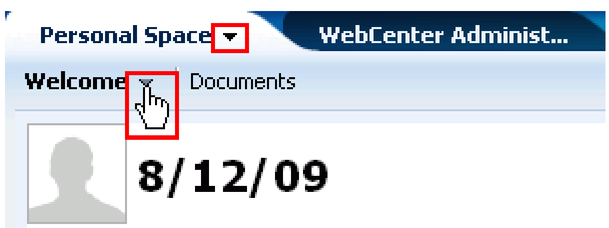
2.6.2 Accessing a Space or Page Actions Menu

A personal space, group space, or page's actions menu icon appears on the personal or group space or page's tab whenever it is foremost in your application view.

To access a personal or group space or page actions menu:

1. Log in, and go to your personal space or the group space where you want to access the actions menu.
2. On an active tab, click the downward arrow icon to the right of the personal or group space or page name (Figure 2–24).

Figure 2–24 Actions Menu Indicators on Space and Page Tabs



On an inactive tab (that is, one that is not forward), right click the tab.

Menu options appear according to whether you access the menu from a personal space, a group space, or a page and according to your privileges on the personal or group space or page.

2.6.3 Sending a Message to Group Space Members or Moderators

The group space actions menu provides an efficient way to contact group space members and the people responsible for maintaining the group space, that is, its moderators. Use tab menu options to open a compose message window in your native email application, with the **To** field pre-populated with the group space members email address or those users assigned the moderator role on the current group space.

To send a message to group space members or moderators:

1. Log in, and go to the group space from which to send a message.
2. Open the actions menu on the group space tab, and select one of the following:
   - **Send Mail to Moderator(s)** to send a message to all moderators of the current group space.
   - **Send Mail to Members** to send a message to all members of the current group space.

The compose mail window contains the URL to the group space. Compose and send the message like any other mail message. For more information, see Section 23.3.6, "Composing and Sending Mail Messages."

The compose message window opens either in your native mail application or in WebCenter's mail compose window, depending on how your application administrator has configured this feature. If the administrator has made such controls available to users, you may define for yourself which mail client opens. For more information, see Section 3.10, "Selecting Your Preferred Mail Connection."

Note: Some services also offer a means of sending a group space a mail message. For example, the Announcements, Events, and Documents services provide such a feature. For more information, see the chapters written for individual services.

2.6.4 Exposing a Group Space Page in Your Personal Space

WebCenter Spaces provides a means of exposing group space pages in your personal space. Use this feature to provide easy access to the group space pages you find most useful. As changes are made to such pages, they are reflected in your view of them in your personal space. The page scope remains that of the group space. For example, if the exposed page has an Events task flow on it, that task flow will continue to show the events associated with the exposed group space.

If you delete such a page from your personal space, it remains a part of its original group space. In other words, deleting it simply removes it from your view of your personal space; it does not actually delete the page. If the page is deleted from its group space, it is unavailable in your personal space, and to clear it from your view, you must refresh the page list in your personal space's Manage Pages dialog.

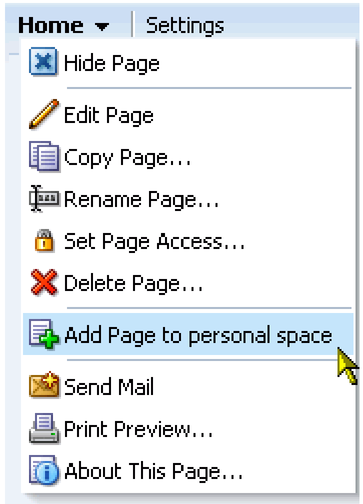
See Also: To learn more about the Manage Pages dialog, see Chapter 7, "Managing Pages."

Note: The group space page that is exposed in a personal space provides a reduced set of options on its actions menu. The actions menu on such pages offer the options **Hide Page**, **Rename Page**, **Delete Page**, **Print Preview**, and **About This Page**. You cannot, for example, access **Edit Page**, **Set Page Access**, and **Copy Page** options from such pages' actions menus.

To expose a group space page in your personal space:

1. Log in, and go to the page of interest in its group space.
2. Open the page's actions menu, and select **Add Page to personal space** (Figure 2–25).

Figure 2–25 Add Page to Personal Space Option on a Group Space Page Actions Menu



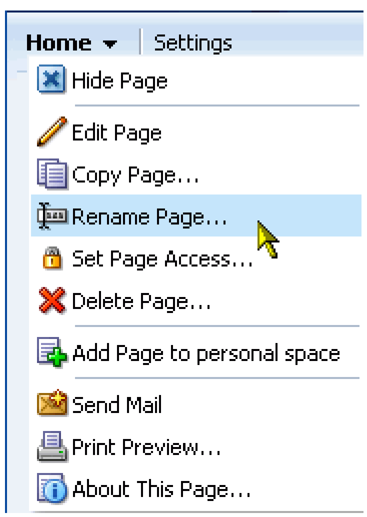
The page is available for viewing and revising from within your personal space according to your permissions on the page. The group space name is prepended to the page name, so the *Sales* page in *Finance* becomes *Finance - Sales* in your personal space.

2.6.5 Renaming a Page

To rename a page from a page actions menu:

1. Log in, and go to the page of interest in its group or personal space.
2. Open the page's actions menu, and select **Rename Page** (Figure 2–26).

Figure 2–26 Rename Page Option on a Page Actions Menu



The Rename Page dialog opens (Figure 2–27).

Figure 2–27 Rename Page Dialog

3. Revise the page name, and click the **Save** icon to save your changes and exit the dialog.

2.6.6 Sending a Link to a Page

To send a link to a page:

1. Log in and go to the page from which to send a link.
2. Expand the page actions menu on the page tab, and select **Send Mail** to open a compose message window.

   The compose message window opens either in your native mail application or in WebCenter's mail compose window, depending on how your application administrator has configured this feature. If the administrator has made such controls available to users, you may define for yourself which mail client opens. For more information, see Section 3.10, "Selecting Your Preferred Mail Connection."

The compose mail window contains the URL to the current page. Compose and send the message as you would any other mail message.

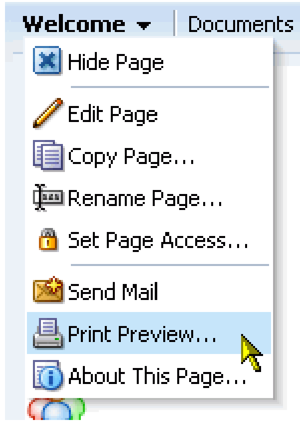
2.6.7 Previewing and Printing an Application Page

When you want to print an application page, the page actions menus on active and inactive tabs provide an option for doing so that includes a convenient print preview. Use the **Print Preview** option to preview and print pages with lots of text content. Print options are not useful for pages made up primarily of links, such as the **Documents** page, **Events** page, and **Lists** page. Print options are useful for pages where content is mainly text based, such as the **Announcements** page, wiki and blog pages, and other custom pages with lots of text.

To preview and print an application page:

1. Log in, and go to the page of interest in its group or personal space.
2. Open the page's actions menu, and select **Print Preview** (Figure 2–28).

Figure 2–28 Print Preview Option on a Page Actions Menu



Your printer dialog opens, and a printable version of the page opens in a new browser window. Print the page, or close your printer dialog and simply preview the page.

> **Tip:** If you close your printer dialog, to reopen press Ctrl+p.

3. Close the preview window when you are finished.

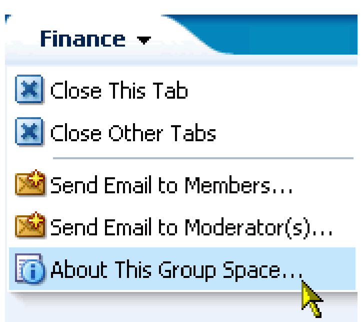
2.6.8 Viewing Space and Page Information

Every group space and every page has associated information, called *metadata*. Group space metadata includes such information as display name, internal identification, description, your membership role, user name of the creator, date created, and a direct URL to the group space location. Page metadata includes such information as display name, user name of the creator, dates created and last modified, and a reusable, direct URL to the group space or page's location.

To access information about a group space or a page:

1. Log in, and go to the group space or page of interest.
2. Open the group space or page's actions menu, and select **About This Space** or **About This Page**, whichever applies (Figure 2–29).

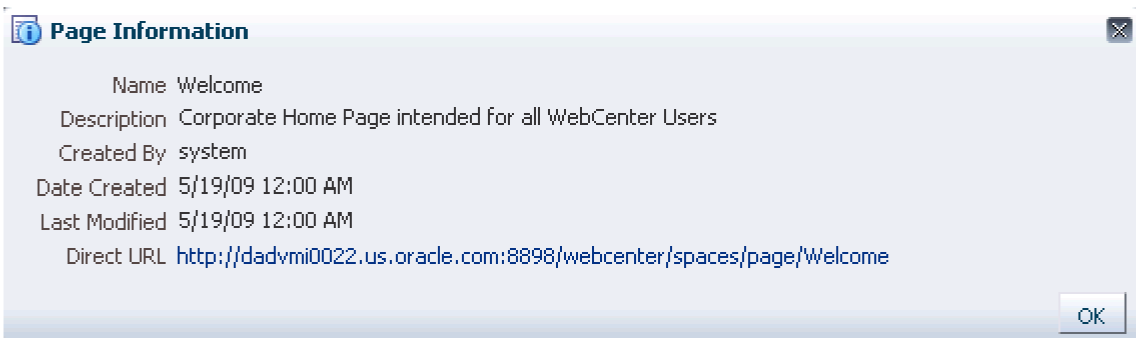
Figure 2–29 About This Group Space Option on a Group Space Actions Menu



A Page or Group Space Information dialog opens (Figure 2–30 and Figure 2–31).

Figure 2–30 Group Space Information Dialog

Figure 2–31 Page Information Dialog



3. Click **OK** when you are finished.

2.6.9 Obtaining a Group Space's Internal ID or a Group Space or Page's Direct URL

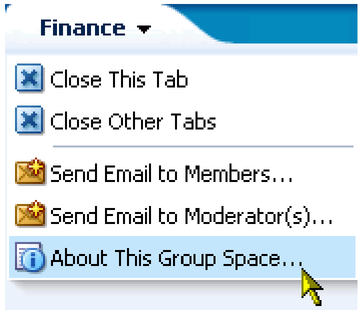
A group space internal ID is useful for operations that call for a unique identifier of a group space. The group space and page direct URLs are useful for publishing a particular group space or page to other users.

The process for obtaining these values is also described in Section 2.6.8, "Viewing Space and Page Information." This section covers this particular option to give it greater visibility.

To obtain a group space's internal ID or a group space or page's direct URl.:

1. Log in, and go to the group space or page of interest.
2. Open the group space or page's actions menu, and select **About This Space** or **About This Page**, whichever applies (Figure 2–32).

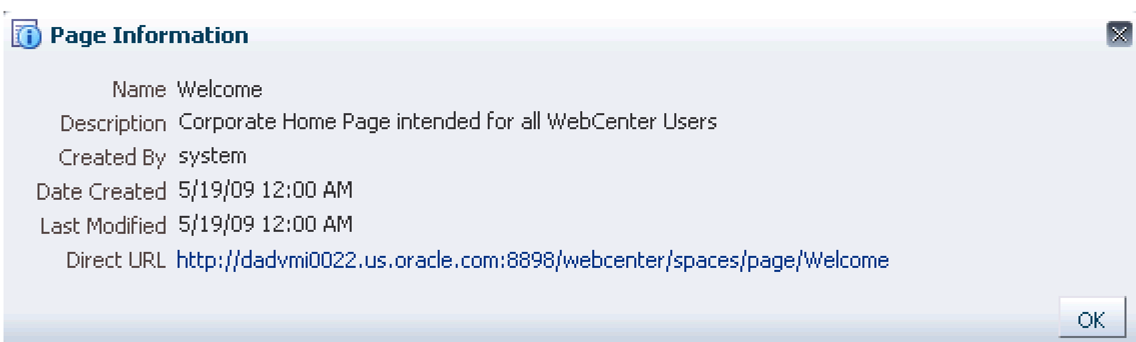
Figure 2–32 About This Group Space Option on a Group Space Actions Menu



A Page or Group Space Information dialog opens (Figure 2–33 and Figure 2–34).

Figure 2–33 Group Space Information Dialog

Figure 2–34 Page Information Dialog



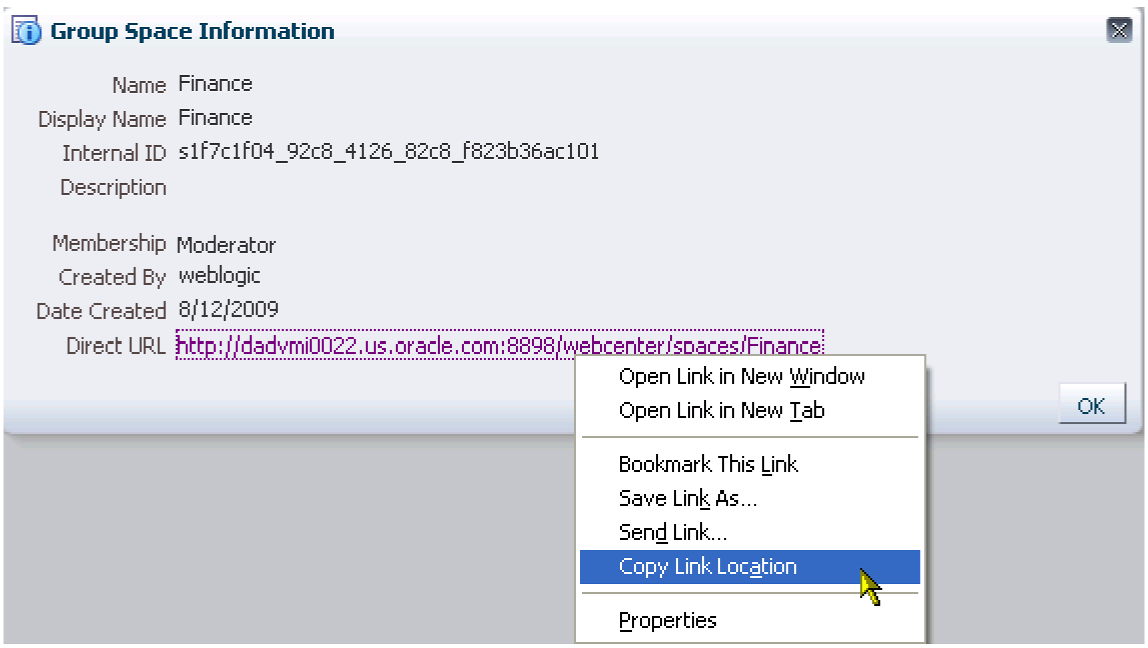
3. The next step you take depends on whether you want to copy a group space internal ID or a group space or page direct—or *pretty*—URL:

   - To copy a group space internal ID, highlight the value next to **Internal ID** and copy it (Figure 2–35)

Figure 2–35 A Group Space Internal ID

- To copy a group space or page URL, right-click the value next to **Direct URL**, and select **Copy Link Location** or your browser's equivalent command from the resulting context menu (Figure 2–36).

Figure 2–36 Copying a Page's Direct URL



Note: Longer Direct URLs can be truncated. This is indicated by an ellipses (…) appended to the displayed URL. When you highlight and copy such a URL, the result is an incomplete URL. To avoid copying an incomplete URL, always use **Copy Link Location**, **Copy Shortcut**, or your browser's equivalent command, to copy a page's direct URL.

---

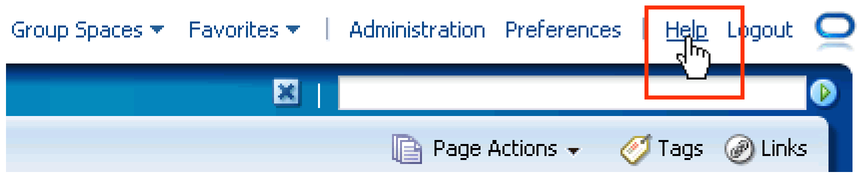
4. Paste the value wherever you need it.
5. Click **OK** to close the dialog.

2.7 Accessing WebCenter Spaces Online Help

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

The **Help** link at the top of the application (Figure 2–37) opens the application's main help page. From there, you can navigate to topics of interest.

Figure 2–37 Help Link

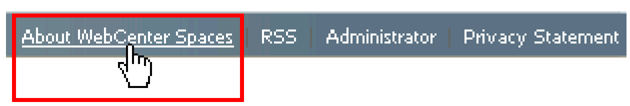


Help buttons, located throughout the application, open help topics that describe what is currently shown.

Figure 2–38 Help Button

The **About WebCenter Spaces** link at the bottom of the application (Figure 2–39) opens the WebCenter Spaces **About** popup.

Figure 2–39 The About WebCenter Spaces Link



The **About** popup provides application version and copyright information (Figure 2–40).

Figure 2–40 Example About Popup

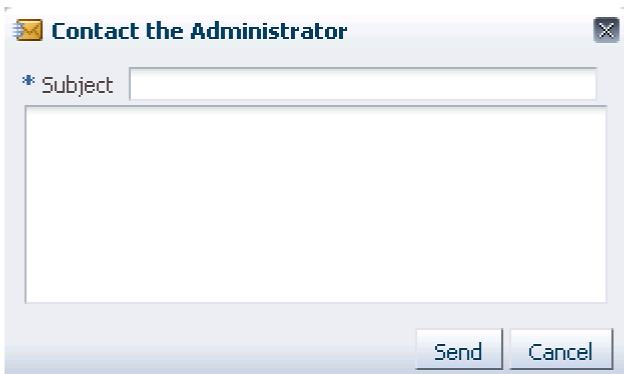
2.8 Contacting Your Application Administrator

WebCenter Spaces provides an easy link for launching a message window through which you can send an inquiry to your application administrator. Simply click the **Administrator** link at the bottom of the application (Figure 2–41).

Figure 2–41 The Administrator Link

A Contact the Administrator dialog opens (Figure 2–42).

Figure 2–42 Contact the Administrator Dialog



Provide a subject in the **Subject** field, compose your message in the text box, and click **Send**. Your message is sent to the application administrator's Worklist (see Chapter 31, "Working with the Worklist Service").

For example, if the application displays an error message, you can copy the message, along with its error code, and paste it into the **Contact the Administrator** text box. This information assists the administrator in addressing the problem.

3 Setting Your Personal Preferences

WebCenter Spaces Preferences provide easy configuration settings for tailoring your application environment to your particular working style. These include settings for your preferred application display language; your preferred application look and feel; your WebCenter Spaces password; the passwords you use to access additional applications, such as your mail or useful enterprise software; and your preferred order for search results. Additionally, WebCenter Spaces Preferences provide an accessibility setting to optimize the application user interface for use with a screen reader, such as JAWS.

Preferences settings affect your view of the entire WebCenter Spaces application. For example, the preferences you set for search results affect all searches, and not just the searches you run from a particular group space. The preferences you set for language affect all translated strings in the application user interface.

This section describes how to specify your personal WebCenter Spaces Preferences. It contains the following subsections:

- Section 3.1, "Choosing Your Preferred Display Language"
- Section 3.2, "Setting Date and Time Preferences"
- Section 3.3, "Enabling or Disabling Screen Reader Optimization"
- Section 3.4, "Changing Your Application Look and Feel"
- Section 3.5, "Changing Your WebCenter Password"
- Section 3.6, "Providing Login Information for External Applications"
- Section 3.7, "Setting Messaging Preferences"
- Section 3.8, "Setting People Connections Preferences"
- Section 3.9, "Setting Preferences for WebCenter Spaces Search Results"
- Section 3.10, "Selecting Your Preferred Mail Connection"

Audience

This chapter is intended for users who want to optimize their WebCenter Spaces environment for their personal use. This includes selecting a display language, providing application login information, and arranging content on the page. This chapter is also intended for users who want a better understanding of the Sidebar.

The WebCenter Spaces application administrator has the authority to expose or hide a particular service's task flows. Tasks discussed in this chapter are not available to you if the relevant service is hidden.

3.1 Choosing Your Preferred Display Language

The display language controls the language in which user interface (UI) elements are rendered in your browser. UI elements include button and field labels, application links, screen text, and so on.

On the Internet, your browser settings normally control the display language used for the various web sites you visit. Browser settings additionally control the display language used the first time you visit your WebCenter Spaces application. Even as a public user—that is, a user who is not logged in to WebCenter Spaces—you have a choice between staying with your browser display language or using a session language that you specify.

In addition to a session-specific language, WebCenter Spaces provides controls for setting an application-level default display language, a personal preference-based default display language, and a group space display language. The order of precedence for WebCenter Spaces display language settings from weakest to strongest is as follows:

- **Browser setting** - your browser documentation describes how to change the browser's language.
- **Application setting** - see "Choosing the Default Display Language" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter*.
- **User preference setting** - see Section 3.1.3, "Setting a User Preference Display Language."
- **Session setting** - see Section 3.1.2, "Setting a Session Display Language."

> **Note:** If the server on which WebCenter Spaces is running does not support the character set of the language preference set in WebCenter Spaces, the output information related to group spaces becomes garbled or displays as question marks.
>
> To work around this issue, users can change the session language or the Language preference to English. This creates new log file information. The log file is typically located at `$WC_DOMAIN/servers/WLS_Spaces/logs`.

- **Group space setting** - see Section 13.7, "Setting a Group Space Display Language."

This section contains the following subsections:

- Section 3.1.1, "What You Should Know About Display Languages in WebCenter Spaces"
- Section 3.1.2, "Setting a Session Display Language"
- Section 3.1.3, "Setting a User Preference Display Language"

3.1.1 What You Should Know About Display Languages in WebCenter Spaces

WebCenter Spaces users can set their preferred display language in two ways:

- A user preference language selection lasts until you select a different language. It can be overridden by a session language, but returns as the default when the session cookie is purged or expires. Set your user preference language on the **General** panel in the Preferences dialog.

- A session language is retained for the life of the session cookie that is generated after you make a selection. If you clear browser cookies, the session language is also cleared and the user preference language takes over or, if a user preference language is not specified, the application display language selected by your WebCenter Spaces administrator. Set a session language using the **Choose A Language** popup on the application **Welcome** page (viewed when you first access WebCenter Spaces, before you log on).

When you set a language and your preferred locale in WebCenter Spaces, you are specifying the language and the locale to use for all elements of the WebCenter Spaces native user interface (UI). This includes application links, field labels, display text, message text, and dialogs.

WebCenter Spaces provides runtime translations for 27 languages and 100 different locales.

Table 3–1 Languages Available for Oracle WebCenter Spaces

A to Fi	Fr to No	P to T
Arabic	French	Polish
Brazilian Portuguese	German	Portuguese
Chinese (Simplified)	Greek	Romanian
Chinese (Traditional)	Hebrew	Russian
Czech	Hungarian	Slovak
Danish	Italian	Spanish
Dutch	Japanese	Swedish
English	Korean	Thai
Finnish	Norwegian	Turkish

The list in Table 3–1 includes all the languages available to WebCenter Spaces out-of-the-box. Your WebCenter Spaces administrator can reduce the number of available languages exposed in WebCenter Spaces by modifying the `supported-languages.xml` file, as described in the white paper "*Extending WebCenter Spaces (11.1.1.2.0)*" available on the Oracle Technology Network (`http://www.oracle.com/technology/products/webcenter/white_papers.html`).

Your locale selection applies special formatting considerations applicable to your selected locale. For example, whether information is typically viewed from left to right or right to left, how numbers are depicted (such as monetary information), and the like. You can change your language to Arabic and, within that language group, select from 20 different locales, including Algeria, Bahrain, Djibouti, and so on.

Note: The administrative tier that offers services to WebCenter Spaces, including such tools as Oracle Enterprise Manager, provides a subset of the languages available to WebCenter Spaces. These include:

- English
- Brazilian Portuguese
- Chinese (Simplified)
- Chinese (Traditional)
- French
- German
- Italian
- Japanese
- Korean
- Spanish

The Discussions service uses the Jive application. Out-of-the-box, the Jive application bundled with WebCenter supports English and Spanish. It does not support other languages listed in Table 3–1. However, Jive is open to your own translation files. For more information, see `http://www.jivesoftware.com/builds/docs/latest/documentation/developer-guide.html#i18n`. This information is explicit to the Jive application user interface.

Information that users add to the WebCenter Spaces application—that is, information that is not a part of the native UI—appears in the language used by its author. Such information includes announcements, documents, discussion forum content, and the like.

3.1.2 Setting a Session Display Language

Opening your web browser initiates a user session. When you select an application display language for your current user session, a session cookie is generated that keeps track of your selection.

The session language is retained for the life of the session cookie. If you clear browser cookies, the session language is also cleared and your default display language takes over or, absent a default, the application display language selected by your WebCenter Spaces administrator.

See Also: For more information about default and session display languages, see Section 3.1.1, "What You Should Know About Display Languages in WebCenter Spaces."

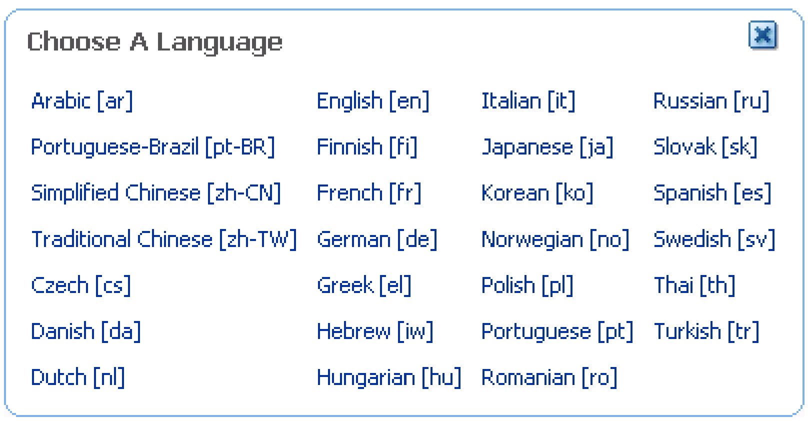
To set a session display language for your WebCenter Spaces application:

1. Open your WebCenter Spaces application.
2. On the application **Welcome** page, click the **Change Language** link (Figure 3–1).

Figure 3–1 The Change Language Link on an Application Welcome Page

3. Select a language from the **Choose A Language** pop-up (Figure 3–2).

Figure 3–2 Choose A Language Pop-Up



The application UI displays in the selected language for the life of the session cookie.

3.1.3 Setting a User Preference Display Language

Use WebCenter Spaces Preferences to select your preferred display language. A display language specified through WebCenter Spaces Preferences is retained across browser sessions. This display language setting can be temporarily overridden by a **Change Language** selection, but a **Change Language** selection remains in effect only for the life of its associated session cookie (for more information, see Section 3.1.2, "Setting a Session Display Language").

To set a user preference display language:

1. Log in, and click the **Preferences** link at the top of the application (Figure 3–3) to open the Preferences dialog (Figure 3–4).

Figure 3–3 The Preferences Link

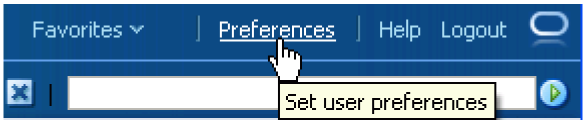
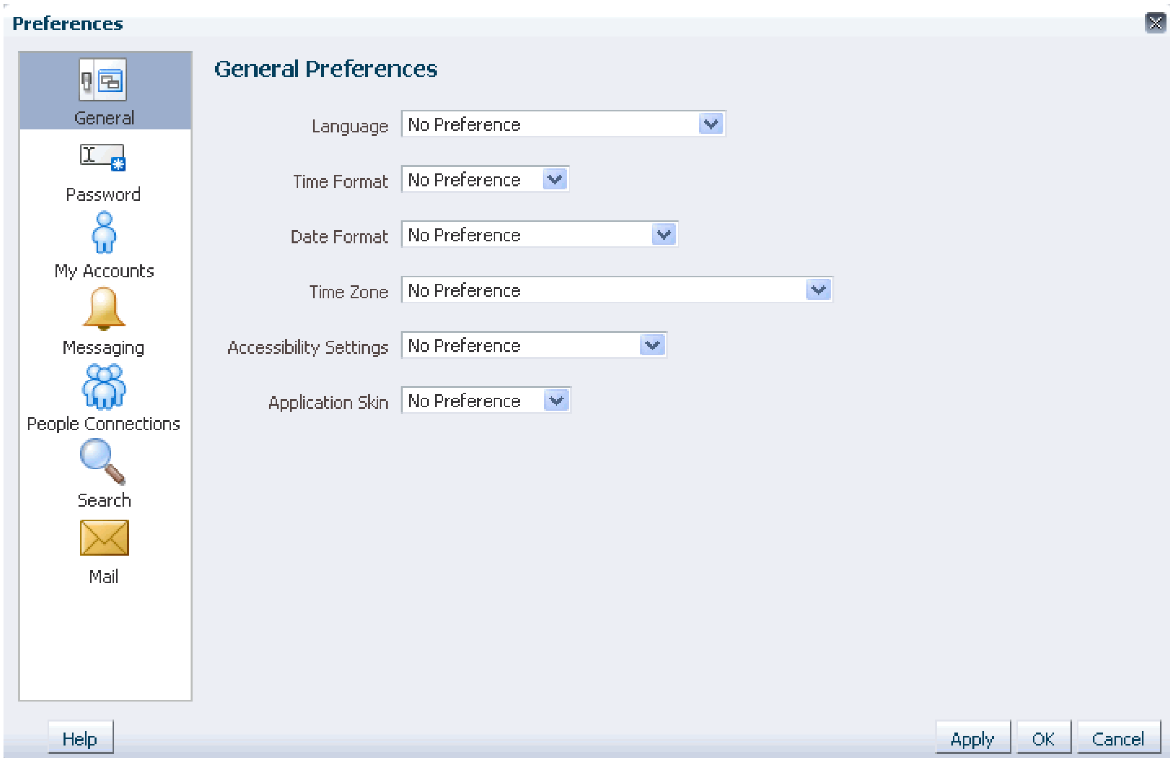
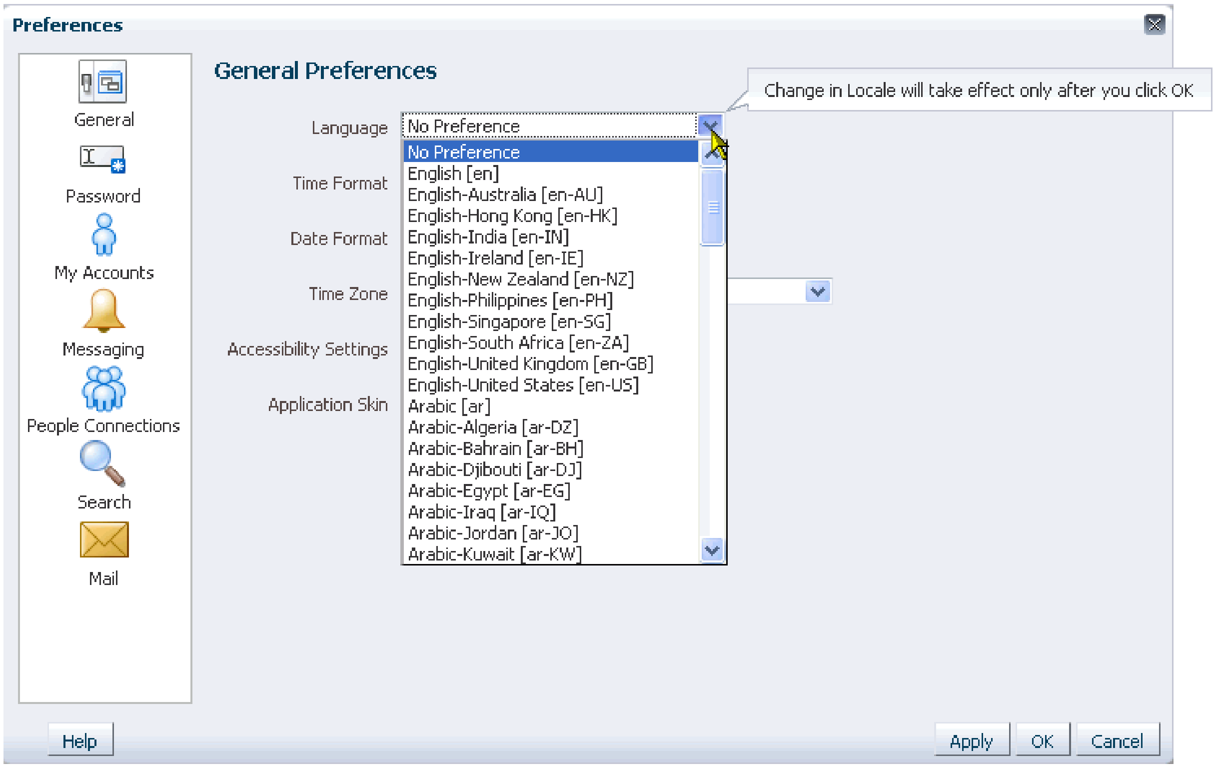


Figure 3–4 The Preferences Dialog



2. Click **General** to access general preferences.
3. From the **Language** dropdown list (Figure 3–5), select your preferred display language-locale.

Figure 3–5 Language List in Preferences Dialog



Alternatively, select **No Preference** to accept the application-level default set by your WebCenter Spaces Administrator.

> **See Also:** For information about setting the application-level default display language, see "Choosing the Default Display Language" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter*.

4. Click **OK** to save your change and exit the Preferences dialog, or click **Apply** to save your change without exiting.

   Your change takes effect when you click **OK**.

3.2 Setting Date and Time Preferences

One way to make the WebCenter Spaces application your own is to set it up to reflect your local time zone and your preferred date and time formats:

- Use the *time format* setting to specify how you want time rendered in your view of WebCenter Spaces. Time is rendered with documents, events, and in many other services.
- Wherever dates appear in the WebCenter Spaces user interface, the *date format* you select under Preferences is the format that is used. Dates appear in many task flows, for example Notes, Worklist assignments, Events, and the like.
- Use the *time zone* preference to tell WebCenter Spaces where in the world you are and the time associated with that place.

Note: Some services may be developed with an intrinsic time display format. In such cases, these services are not influenced by your Preference selection.

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

1. Log in, and click the **Preferences** link at the top of the application to open the Preferences dialog.
2. Click **General** to access general preferences.
3. Set your date and time preferences.

   Table 3–2 lists and describes selections on the Preferences **General** panel.

Table 3–2 Date and Time Preference Settings

Preference	Setting Options
Time Format	The following list shows time formats; the formats in the UI reflect the current time: ▪ **No Preference**—To display the default Time Format established by the WebCenter Spaces administrator ▪ **H:M AM/PM**—To display hour, minutes, and AM or PM ▪ **H:M:S AM/PM**—To display hour, minutes, seconds, and AM or PM ▪ **H:M:S AM/PM Time Zone**—To display hour, minutes, seconds, AM or PM, and the abbreviation of the specified time zone
Date Format	The following list shows date formats; the formats in the UI reflect the current date: ▪ **No Preference**—To use the default date format set by the WebCenter Spaces administrator ▪ **M/D/YY**—To use a number format ▪ **MON D, YYYY**—To use an abbreviation format and the full year ▪ **Month D, YYYY**—To display the full month name and the full year ▪ **DAY, MONTH D, YYYY**—To display the full month name, the full year, and include the day of the week,
Time Zone	From the **Time Zone** pick list, select your preferred time zone. Alternatively select **No Preference** to accept the application-level default set by your WebCenter Spaces Administrator.

4. Click **OK** to save your change and exit the Preferences dialog, or click **Apply** to save your change without exiting.

   Alternatively, click **Cancel** to cancel your change and exit the Preferences dialog.

3.3 Enabling or Disabling Screen Reader Optimization

The **General** panel in the Preferences dialog contains a list of options related to accessibility. You can use these options to optimize the application user interface (UI) for use with a screen-reader, such as JAWS. This section describes how to access accessibility options and explains the meaning of each option.

To optimize the application UI for use with a screen-reader:

1. Log in, and click the **Preferences** link at the top of the application to open the Preferences dialog.
2. Click **General** to access general preferences.

3. From the **Accessibility Settings** pick list, select your preferred accessibility setting.

   Choose from the following options:

   - **No Preference**—The UI is not optimized for a screen reader. Screen readers can still process the WebCenter Spaces UI, but the UI is not optimized for screen readers.
   - **Enable Screen Reader Mode**—The UI is optimized for screen readers.
   - **Disable Screen Reader Mode**—The UI is not optimized for screen readers. Screen readers can still process the WebCenter Spaces UI, but the UI is not optimized for screen readers.

4. Click **OK** to save your change and exit the Preferences dialog, or click **Apply** to save your change without exiting.

   Alternatively, click **Cancel** to cancel your change and exit the Preferences dialog.

3.4 Changing Your Application Look and Feel

The **General** panel in the Preferences dialog provides a pick-list of application skins for your WebCenter Spaces application. Application skins specify the application background color, screen fonts, and, with some skins, the shapes and images used for application buttons and icons.

To change your application skin:

1. Log in, and click the **Preferences** link at the top of the application to open the Preferences dialog.
2. Click **General** to access general preferences.
3. From the **Application Skin** pick list, select your preferred application skin.

   Choose from the following options:

   - **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

4. Click **OK** to save your change and exit the Preferences dialog, or click **Apply** to save your change without exiting.

   The application refreshes, using the skin you selected.

   > **See Also:** Advanced users can create custom application templates and deploy them to WebCenter Spaces. For more information, see the white papers, "*Customizing Site Templates in WebCenter Spaces (11.1.1.2.0)*," and, "*Extending WebCenter Spaces (11.1.1.2.0)*," on the Oracle Technology network: `http://www.oracle.com/technology/products/webcenter/white_papers.html`.

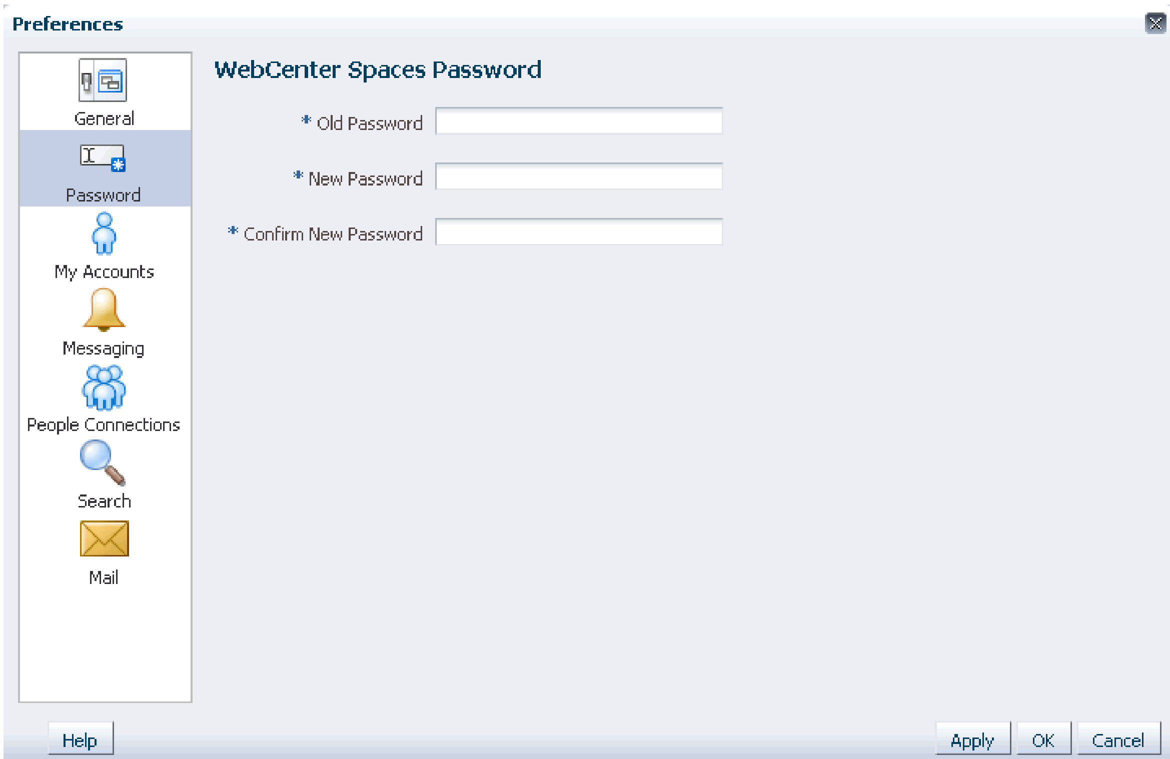
3.5 Changing Your WebCenter Password

Once you self-register or receive login credentials from the WebCenter administrator, you can change your password. Changing your password on a regular basis is one way you can participate directly in securing your application software. This section describes how.

To change your WebCenter Spaces password:

1. Log in, and click the **Preferences** link at the top of the application.
2. Click **Password** to open the **Password** panel (Figure 3–6).

Figure 3–6 The Preferences Password Panel



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 Spaces application users. For password requirements and restrictions, contact your application administrator.

5. In the **Confirm New Password** field, enter your new password again.
6. Click **OK** to save your change and exit the Preferences dialog, or click **Apply** to save your change without exiting.

   Alternatively, click **Cancel** to cancel your change and exit the Preferences dialog.

3.6 Providing Login Information for External Applications

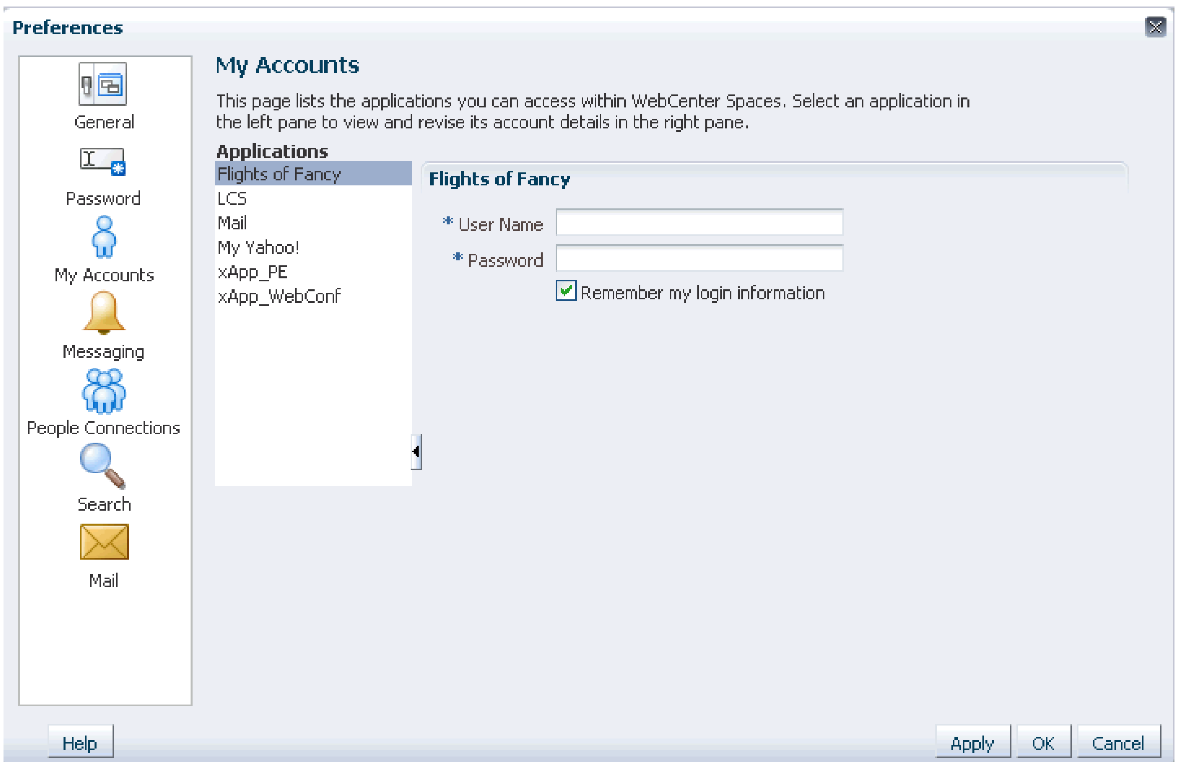
The **My Accounts** panel in the Preferences dialog provides one-stop access to supply or revise credentials for all external applications that are exposed in WebCenter Spaces. My Accounts provides a way to store application login credentials so that you provide them only once for the life of the credential. Once credentials are entered and stored, every time you access an external application within WebCenter Spaces the login credentials are provided automatically. This gives you a single-sign-on type of experience where one login (to WebCenter Spaces) provides access to multiple applications.

Note: If you change the login credentials for an application, you must enter them again into WebCenter Spaces Preferences as described in this section.

To provide login credentials for external applications:

1. Log in, and click the **Preferences** link at the top of the application.
2. Click **My Accounts** to open the **My Accounts** panel (Figure 3–7).

Figure 3–7 The My Accounts Panel in the Preferences Dialog



3. In the left pane of the **My Accounts** panel, select an application.

   Log-in credential fields and check boxes are shown in the right pane.

4. Enter log-in credentials as required for the selected application.

   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.

   Fields requiring values are marked with an asterisk (*).

5. Select **Remember my login information** to enable automatic authentication to the selected application every time you log in to WebCenter Spaces.

When you do not select this option, the login information that you enter is used only for the current user session. The next time you log in to WebCenter Spaces, you must also log in to this application.

6. Click **Apply** to save your changes and remain in the Preferences dialog.

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

3.7 Setting Messaging Preferences

The **Messaging** panel in the Preferences dialog provides a means of configuring messaging *channels* and defining messaging *filters*.

Messaging channels are the channels over which messages, notifications, and alerts are received. Channel types include mail, voice over internet (VoIP), and the like. Messages, notifications, and alerts come from services registered with the Oracle User Messaging Service.

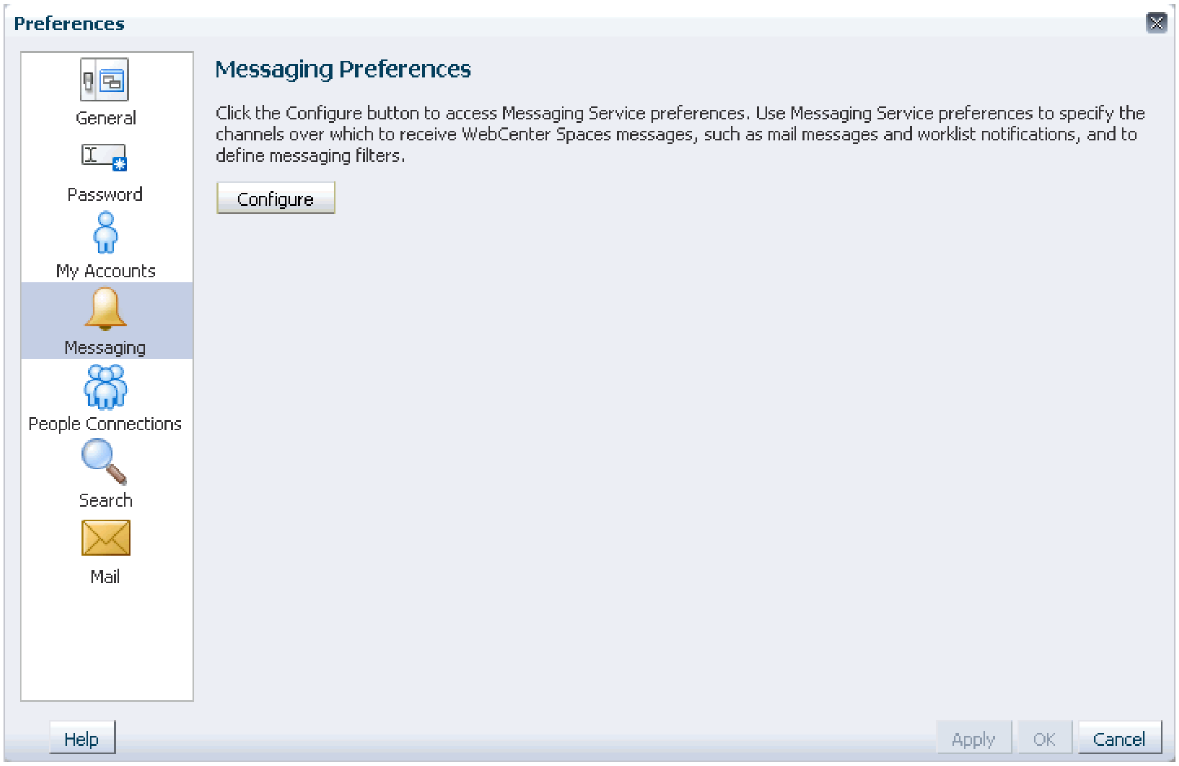
Messaging filters define sorting conditions for messages and specify the channels through which to send the messages that meet the conditions.

Messages, alerts, and notifications are sent to the Oracle User Messaging Service, which applies messaging filters, which in turn specify how messages, alerts, and notifications that meet different sets of conditions should be routed.

The **Messaging** panel in WebCenter Spaces Preferences (Figure 3–8) provides a **Configure** button for navigating to a messaging configuration page.

Note: The **Configure** button is active only when a BPEL server is configured with WebCenter Spaces.

Figure 3–8 Messaging Panel in the Preferences Dialog



Click the **Configure** button to view the messaging tabs:

- **Messaging Channels**—Configure the messaging channels (such as mail, voice, and so on) over which to deliver your notifications and alerts.
- **Messaging Filters**—Define rules for filtering your notifications and alerts.

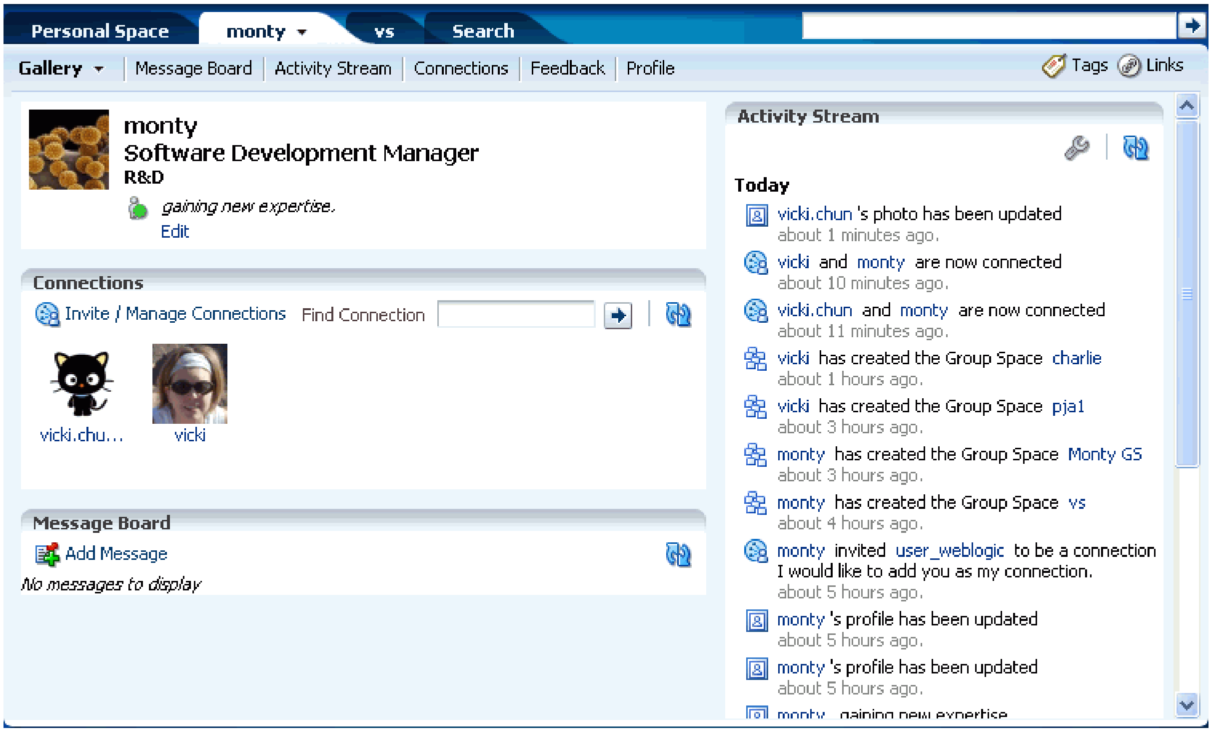
The online help available with the Oracle User Messaging Service provides configuration guidance. Additionally, see *Oracle Fusion Middleware Developer's Guide for Oracle SOA Suite*.

Note: In environments where multiple BPEL connections are registered against the WebCenter Worklist component, the messaging preferences repository is shared by all. When you set messaging preferences for one connection, you set them for all.

3.8 Setting People Connections Preferences

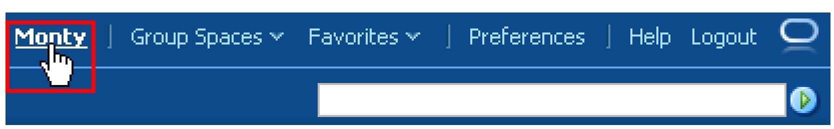
The People Connections service includes features for accessing personal profiles, connecting with other users, viewing user activity, posting messages, and offering feedback. Once you log on to your WebCenter application, a top-level tab becomes available with a selection of People Connections task flows. The tab label is your user name (Figure 3–9).

Figure 3–9 A User's Default People Connections Page



If you close this page, you can access it again by clicking your user name at the top of the application (Figure 3–10).

Figure 3–10 A User Name in the WebCenter Spaces Application



> **See Also:** Features of the People Connections service are discussed in detail in Chapter 25, "Working with the People Connections Service."

Before you begin using People Connections task flows, you can prepare your social networking environment by specifying your People Connections preferences. The preferences you can specify are influenced by the preferences made available to you by your application administrator. The administrator can choose to hide or show some controls; consequently, you may not have access to some controls described in this section.

> **See Also:** For more information about People Connections and the application administrator, see, "Managing the People Connections Service," in the *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter*.

This section contains the following subsections:

- Section 3.8.1, "Setting Activity Stream Preferences"

- Section 3.8.2, "Setting Connections Preferences"
- Section 3.8.3, "Setting Profile Preferences"
- Section 3.8.4, "Setting Message Board Preferences"
- Section 3.8.5, "Setting Feedback Preferences"

3.8.1 Setting Activity Stream Preferences

The Activity Stream monitors and logs your application and social-networking activities and the activities of fellow application users. For example, whenever you connect with another user, post a message on a Message Board, leave feedback, and other like activities, these are noted in your Activity Stream task flow.

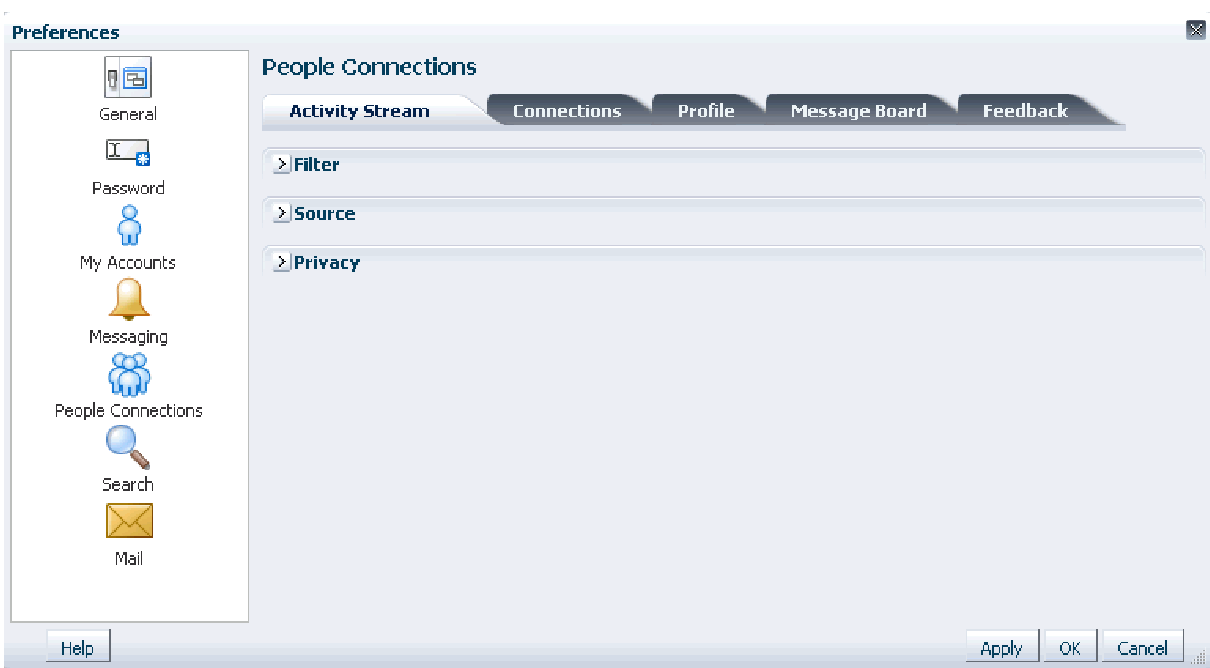
> **See Also:** For information about the services that Activity Stream tracks, see Table 25–2, in Chapter 25, "Working with the People Connections Service."

Use Activity Stream preferences to specify who can view your Activity Stream, the services for which to track activities, and the activities to show in an Activity Stream task flow.

To set Activity Stream preferences:

1. Log in, and click the **Preferences** link at the top of the application to open the Preferences dialog.
2. Click **People Connections** to display People Connections preferences.
3. Click the **Activity Stream** tab to bring it forward (Figure 3–11).

Figure 3–11 Activity Stream Tab on the People Connections Preferences Panel



4. Click the **Expand** icon to the left of **Filter** to select the services for which to track activities.

Select a checkbox to track the activity of a particular service; clear a checkbox to ignore the activity of a particular service.

5. Click the **Expand** icon to the left of **Source** to control the default activities to show in Activity Stream task flows.

   Table 3–3 lists and describes each option.

Table 3–3 Activity Stream Source Options

Option	Description
Connections	Specify the source of the personal activities to show. Choose from: ■ **Don't include personal space activities**—Select to omit all personal space activities. ■ **Include personal space activities from all connections**—Select to include all the personal space activities of you and your connections. ■ **Include personal space activities from people in specified connection lists**—Select to include the activities of users on the connection lists you specify. When you select this option, a **Selected Connection Lists** section opens with an **Add/Choose** link. Click the link to open a dialog from which you can select the connection lists to use.
Group Spaces	Specify the source of group space activities to show. Choose from: ■ **Don't include group space activities**—Select to omit all group space activities. ■ **Include all group space activities**—Select to include all group space activities. Activity Stream task flows display activities from only the group spaces to which you have access. ■ **Include activities from specified group spaces**—Select to specify the group spaces from which to show activities. Selecting this option results in the display of a **Selected Group Spaces** section with an **Add/Choose** link. Click this link to open a dialog from which to select group spaces.

6. Click the **Expand** icon to the left of **Privacy** to specify who can view your activities in Activity Stream task flows:

   > **Note:** Your application administrator can set this value at the application level and prevent users from changing it.

   From the dropdown list next to **Allow all my activities to be viewed by**, choose from:

   - **Everyone—**Any user, whether logged in or not, can view your activities.
   - **Authenticated Users—**Users who have logged in can view your activities.
   - **My Connections—**Only you and your connections can view your activities.
   - **Myself—**Only you can view your activities.

7. Click **OK**.

   Instead, you can also click **Apply** to save your changes but remain in the Preferences dialog.

3.8.2 Setting Connections Preferences

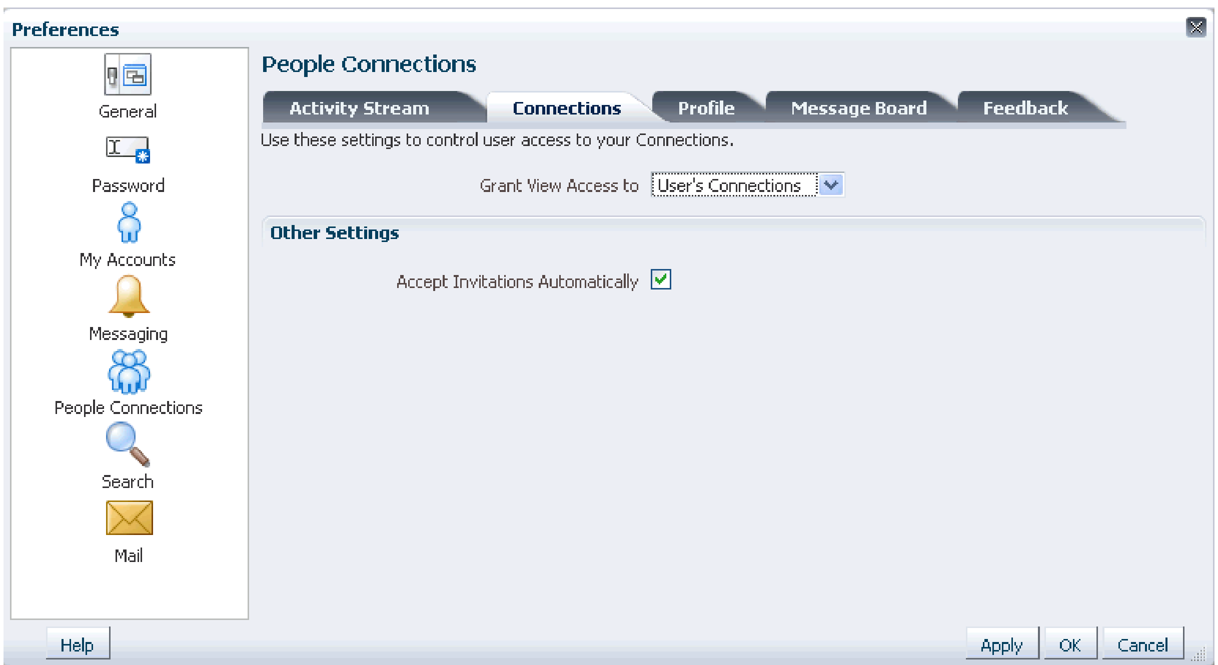
Use Connections to set up your internal social network of friends and business contacts. The users that you identify as your connections can enjoy special privileges on information relating to your application and social networking activity. For example, as a connection, you may have a greater level of access to your connections' Message Board and Feedback task flows. You may be able to view a greater level of detail in your connections' personal profiles. This all depends on the permissions you and your connections set for yourselves in People Connections Preferences.

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

To set Connections preferences:

1. Log in, and click the **Preferences** link at the top of the application to open the Preferences dialog.
2. Click **People Connections** to display People Connections preferences.
3. On the People Connections panel, click the **Connections** tab to bring it forward (Figure 3–12).

Figure 3–12 Connections Tab on the People Connections Preferences Panel



4. From the **Grant View Access to** dropdown list, select the users who can view your list of connections.

   Choose from:

   - **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 the users you have accepted as your Connections can view your connections.
   - **User Only**—Only you can view your connections.

5. Select **Accept Invitations Automatically** to automatically accept any invitation to connect with another user.

   Clear this checkbox to leave yourself the option of accepting, refusing, or ignoring an invitation to connect with another user.

6. Click **Apply** to save your settings and remain in the Preferences dialog.

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

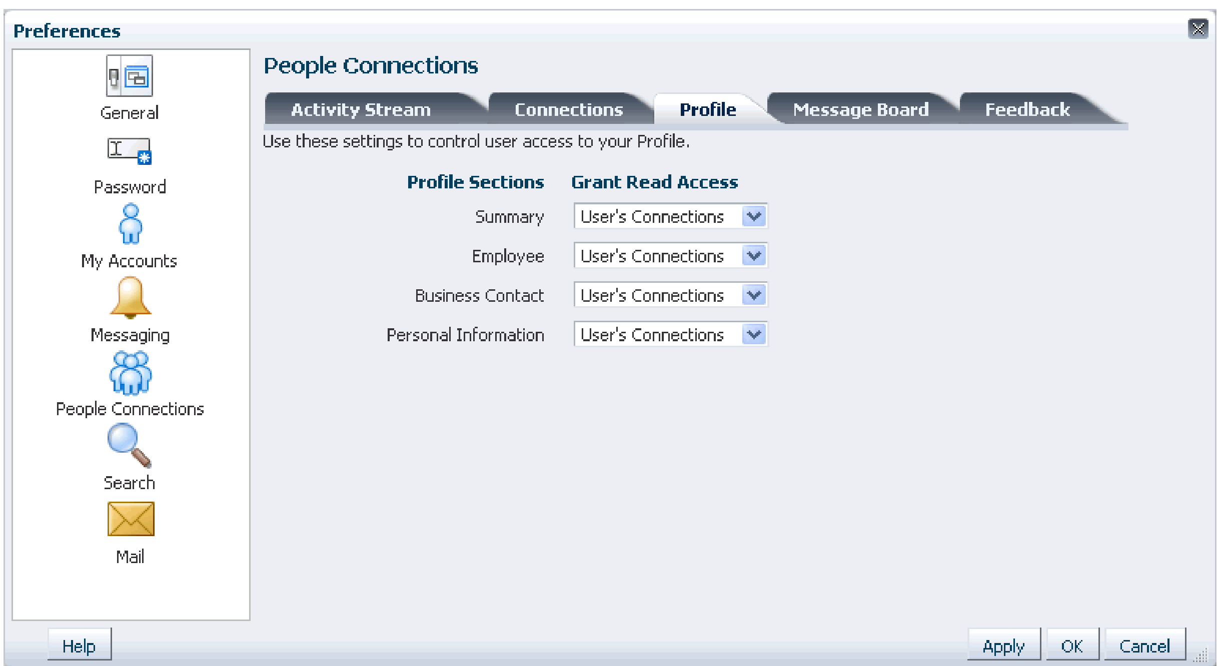
3.8.3 Setting Profile Preferences

Your People Connections personal profile is populated from the back-end identity store that provides WebCenter Spaces with users. Use Profile-related preferences to specify who can access different types of information associated with your personal profile.

To set Profile preferences:

1. Log in, and click the **Preferences** link at the top of the application to open the Preferences dialog.
2. Click **People Connections** to display People Connections preferences.
3. Click the **Profile** tab to bring it forward (Figure 3–13).

Figure 3–13 Profile Tab on the People Connections Preferences Panel



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

Using the settings on the **Profile** tab, you can specify different levels of access for different groups of users on each section of your personal profile.

Choose from:

- **Everyone**—All users, including users who are not logged in, can see the associated profile section in your profile.
- **Authenticated Users**—Only users who are logged in can view the information in the specified section of your personal profile.
- **User's Connections**—Only you and the users you have accepted as your Connections can view the information in the specified section of your personal profile.
- **User Only**—Only you can view the information in the specified section of your personal profile.

4. Click **Apply** to save your settings and remain in the Preferences dialog.

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

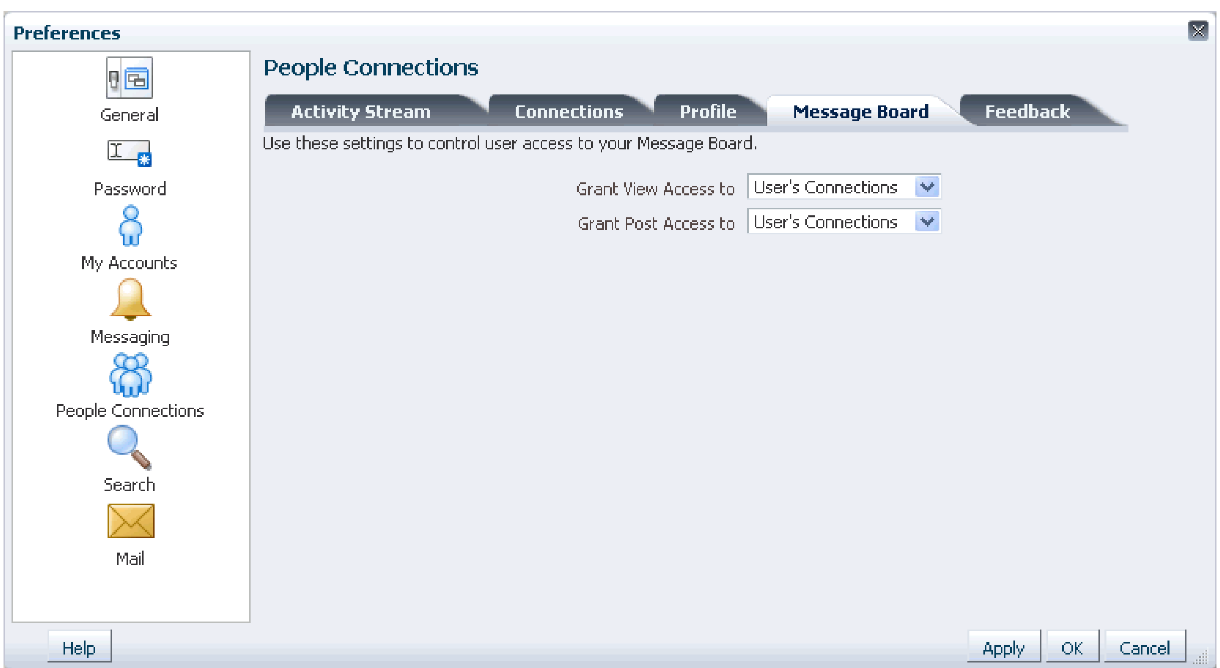
3.8.4 Setting Message Board Preferences

The Message Board is like a select community bulletin board. Use it to post your own messages and view the messages of others. Use Message Board preferences to specify who can view and post to your Message Board.

To set Message Board preferences:

1. Log in, and click the **Preferences** link at the top of the application to open the Preferences dialog.
2. Click **People Connections** to display People Connections preferences.
3. Click the **Message Board** tab to bring it forward (Figure 3–14).

Figure 3–14 Message Board Preferences



4. Set your Preferences for the Message Board.

Table 3–4 lists and describes each option.

Table 3–4 Message Board Preference Options

Option	Description
Grant View Access to	Select who can view your Message Board. Choose from: ■ **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 have accepted as 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. Choose from: ■ **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 the users you have accepted as your Connections can post messages to your Message Board. ■ **User Only**—Only you can post messages to your Message Board.

5. Click **Apply** to save your settings and remain in the Preferences dialog.

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

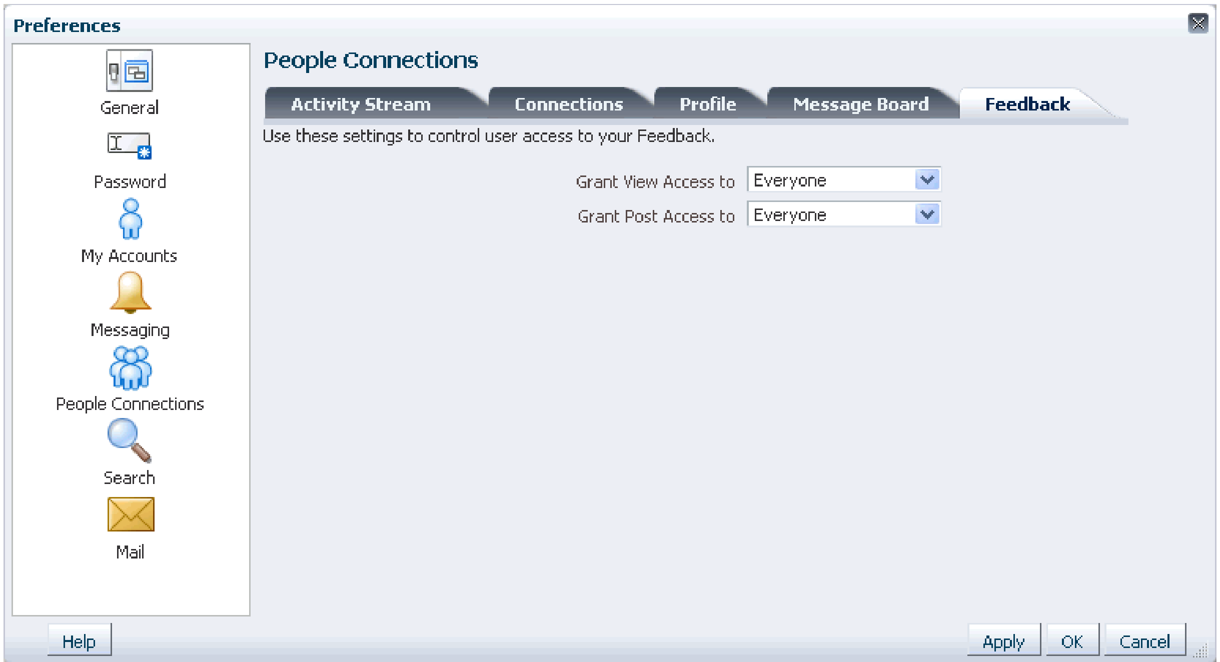
3.8.5 Setting Feedback Preferences

Feedback provides a means of viewing and posting observations about the efforts of other users and viewing observations from other users about your own efforts. Use Feedback preferences to specify who can view and post feedback about your efforts.

To set Feedback preferences:

1. Log in, and click the **Preferences** link at the top of the application to open the Preferences dialog.
2. Click **People Connections** to display People Connections preferences.
3. Click the **Feedback** tab to bring it forward (Figure 3–15).

Figure 3–15 Feedback Tab on the People Connections Preferences Panel



4. Set your Preferences for Feedback.

   Table 3–5 lists and describes each option.

Table 3–5 Feedback Preference Options

Option	Description
Grant View Access to	Select who can view Feedback given to you. Choose from: ▪ **Everyone**—All users, including users who are not logged in, can view your Feedback messages. ▪ **Authenticated Users**—Only users who are logged in can view your Feedback messages. ▪ **User's Connections**—Only you and the users you have accepted as your Connections can view your Feedback messages. ▪ **User Only**—Only you can view your Feedback messages.
Grant Post Access to	Select who can provide Feedback to you. Choose from: ▪ **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 the users you have accepted as your Connections can post Feedback messages to you. ▪ **User Only**—No one can post Feedback messages to you.

5. Click **Apply** to save your settings and remain in the Preferences dialog.

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

3.9 Setting Preferences for WebCenter Spaces Search Results

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

WebCenter Spaces search preferences provide this capability. Use search preferences to select the services to search, specify the display order for search results, and choose the information you want to display with search results. This section describes how. It contains the following subsections:

- Section 3.9.1, "Selecting the Services to Search"
- Section 3.9.2, "Specifying a Display Order for Search Results"
- Section 3.9.3, "Specifying the Type and Order of Information to Show with Search Results"

> **See Also:** For detailed information about searching in WebCenter Spaces, see Chapter 28, "Working with the Search Service." For information about a Document Library search, see Section 18.4.8, "Running Document Searches in the Document Manager Task Flow."

3.9.1 Selecting the Services to Search

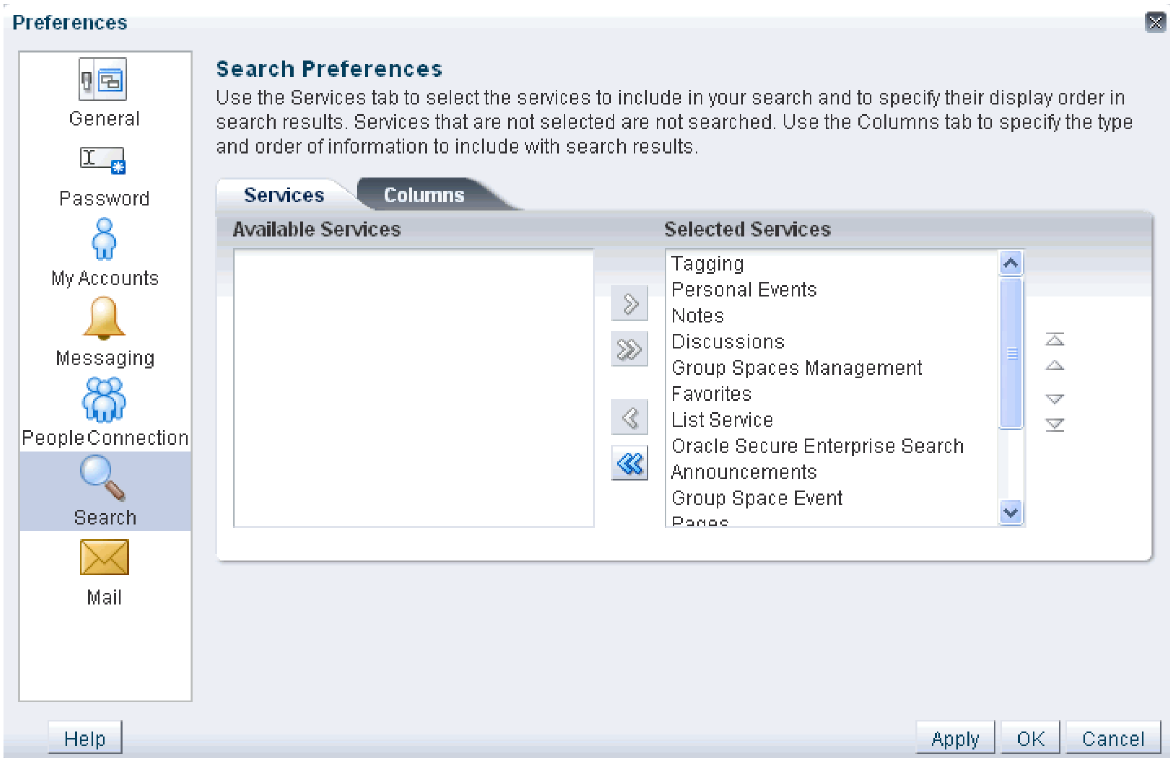
Your WebCenter Spaces administrator makes services available to the WebCenter Spaces application. Some of these services, while quite useful, may not often provide particularly useful search results. For example, if you frequently search for mention of a particular type of technology, including your personal contacts in the search is probably not useful.

By configuring the WebCenter Spaces search engine to search only those services you select, you can exclude those services most likely to return irrelevant search results. This section describes how.

To select the services to be searched:

1. Log in, and click the **Preferences** link at the top of the application.
2. Click **Search** to open the **Search Preferences** panel (Figure 3–16).

Figure 3–16 The Search Preferences Panel



3. To add a service to a search, select one or more services on the **Available Services** list by checking their checkboxes, and then click the **Move selected items to list** icon to move them to the **Selected Services** list.

   To remove services from search, select 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.

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

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

The services you add to the **Selected Services** list are included in future WebCenter Spaces searches. The services on the **Available Services** list are not searched.

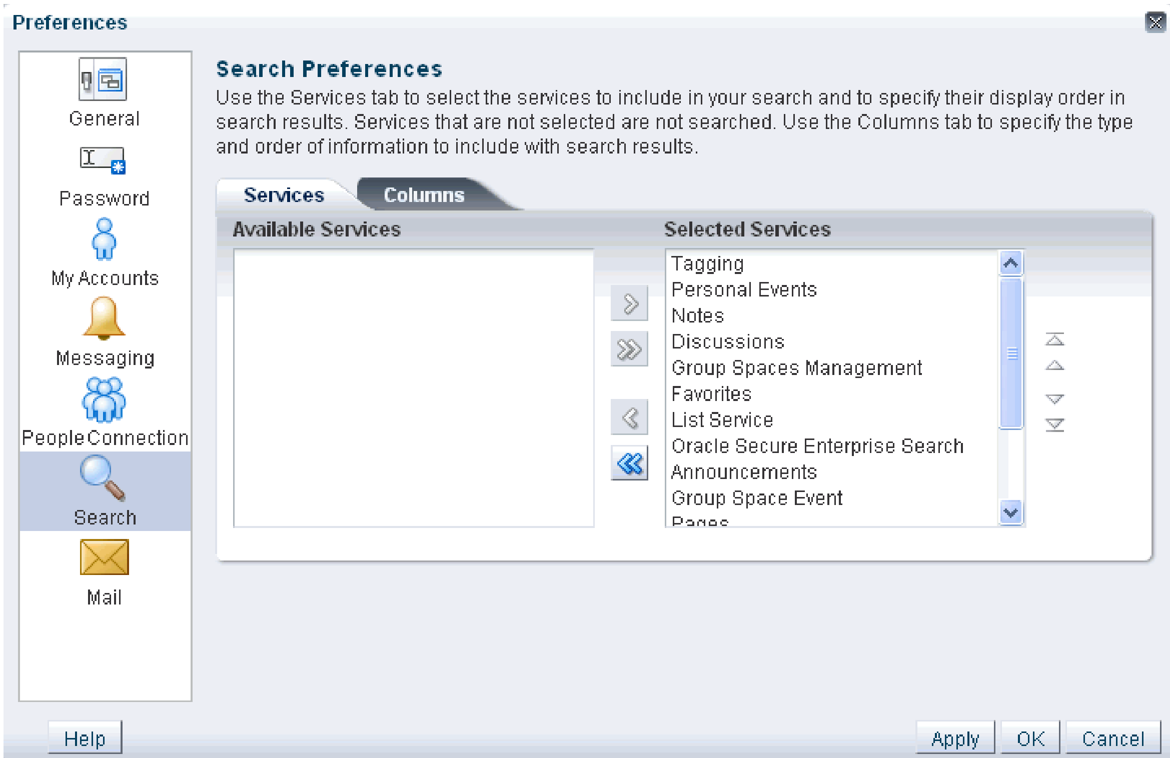
3.9.2 Specifying a Display Order for Search Results

Of all the services you include in a WebCenter Spaces search, you may find that some services provide more relevant results than others. If this proves true, you can ensure that the results from those services display first. WebCenter Spaces Preferences provide controls for specifying the order in which services are listed in search results. This section describes how to use them.

To specify a display order for search results:

1. Log in, and click the **Preferences** link at the top of the application.
2. Click **Search** to open the **Search Preferences** panel (Figure 3–17).

Figure 3–17 The Search Preferences Panel



3. Select one or more services on the **Selected Services** list by checking their checkboxes, 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 each service is 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.

3.9.3 Specifying the Type and Order of Information to Show with Search Results

You can use Search Preferences to specify the type of information to show with search results and the order in which that information is presented. Information types include *Icon*, *Title*, *Person*, *Size*, *Date*, and *Type*.

To specify the type and display order of information to show with search results:

1. Log in, and click the **Preferences** link at the top of the application.
2. Click **Search** to open the Search Preferences panel.
3. Click the **Columns** tab to bring it forward (Figure 3–18).

Figure 3–18 The Columns Tab in Search Preferences

4. To set the types of columns to show in search results, select one or more column titles on the **Available Columns** list and then click the **Move selected items to other list** icon to move your selections to the **Selected Columns** list.

   Choose from:

   - **Icon**—An icon representing a result's item type.
   - **Title**—The linked title of the search result. For a file, this is the file name. Click this link to navigate to the result.
   - **Person**—The person who owns the result. For a file, this is the user who uploaded or last modified the file. Right-click the person listed to access a context menu with options for contacting the person (for more information, see Chapter 20, "Working with the Instant Messaging and Presence Service (IMP)").
   - **Size**—The size of the result, for example, the file size.
   - **Date**—The date the result was added to WebCenter Spaces. For a file, this is the date it was uploaded or last modified.
   - **Type**—The object type of the result. For example, for a graphic this is the type *image*.

   To remove an information column from search results, select one or more column titles on the **Selected Columns** list and then click the **Remove selected items from list** icon to move your selections to **Available Columns**.

5. To set the order in which search result information is shown, select the checkbox of one or more column names in the **Selected Columns** list and then click the **Move** icons to the right of the list to rearrange column titles into the display order you prefer.

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

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

Search results present all of the information you specify here, in your preferred order.

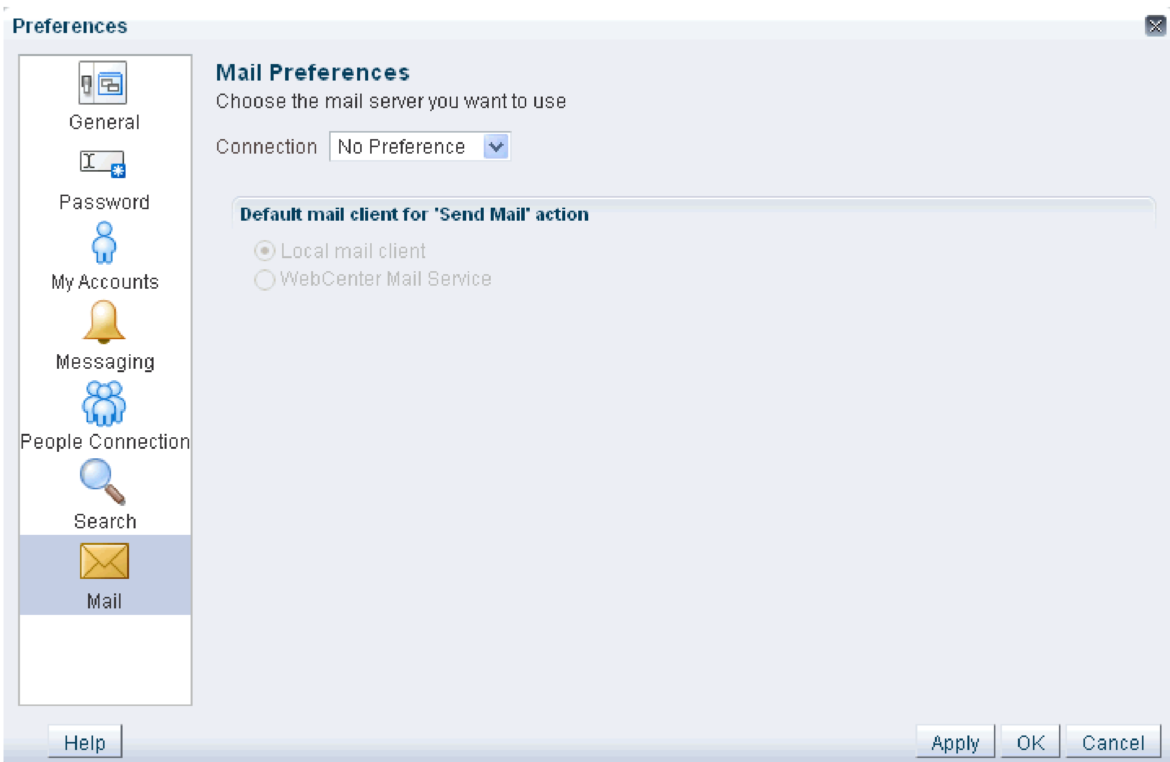
3.10 Selecting Your Preferred Mail Connection

When your WebCenter Spaces application provides access to multiple mail connections, it also provides a way for you to select which connection to use. This section describes how.

To select your preferred mail connection:

1. Log in, and click the **Preferences** link at the top of the application.
2. Click **Mail** to open the Mail Preferences panel (Figure 3–19).

Figure 3–19 The Mail Preferences Panel



3. From the **Connection** dropdown list, select the mail connection you want to use for accessing your mail through WebCenter Spaces.

   The options available on this list depend on the connections your system administrator makes available to your WebCenter Spaces application. 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 from:

- **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 Mail Service**—Select to specify to open a WebCenter 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 Spaces.

   For information about logging out, see Section 2.2.2, "Logging Out of WebCenter Spaces."
7. Log in to WebCenter Spaces.
8. If you previously saved your credentials for this mail connection to the WebCenter Spaces credential store, 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 3.6, "Providing Login Information for External Applications") or using the login link in a Mail task flow (see Section 23.3.2, "Logging in to Mail").

4 Organizing Your Environment

The WebCenter Spaces application provides many opportunities for changing its environment to suit your personal working style. These include changing the display language, managing your application password, and rearranging your view of page content. All of these options are *personalizations*, that is, they affect only your view of the application. All other users' views remain unchanged.

This chapter steps you through these and other personalizations. It contains the following sections:

- Section 4.1, "What You Should Know About Organizing Your Environment"
- Section 4.2, "Personalizing Your Page View"
- Section 4.3, "Removing Your Page Personalizations"
- Section 4.4, "Working with the WebCenter Spaces Sidebar"
- Section 4.5, "Working with External Applications"

Audience

This chapter is intended for users who want to optimize their WebCenter Spaces environment for their personal use. This includes selecting a display language, providing application login information, and arranging content on the page. This chapter is also intended for users who want a better understanding of the Sidebar.

The WebCenter Spaces application administrator has the authority to expose or hide a particular service's task flows. Tasks discussed in this chapter are not available to you if the relevant service is hidden.

4.1 What You Should Know About Organizing Your Environment

Personalizations are yours and yours alone. That is, the personalizations you set through the procedures described in this chapter affect only your view of WebCenter Spaces. No other users are affected by your changes.

For example, when you reposition page components, that change applies only to your view of the application. Other users may reorganize their own views of pages, and their changes do not affect your view—only their own.

4.2 Personalizing Your Page View

You can personalize the way pages appear in many ways without opening the page editor (Oracle Composer). For example, you can reposition components, remove components from your view of a page, resize a component's height, and collapse components to display just their headers. These actions are called *personalizations* because the changes you make when you personalize a page affect only your view of that page. No one else sees your personalizations.

> **See Also:** For more information about personalization, see Section 10.2, "Customizing and Personalizing Page Content."

Whether you can personalize a page depends on permissions granted to you or your user role and on how personalizations 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 application administrator to ask for a higher-level of access or for a configuration change. For information about contacting your application administrator, see Section 2.8, "Contacting Your Application Administrator."

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

This section describes how to perform the personalizations *rearrange*, *change layout*, *resize*, *minimize*, and *maximize*. It contains the following subsections:

- Section 4.2.1, "Rearranging Page Content"
- Section 4.2.2, "Changing Your Page Layout"
- Section 4.2.3, "Removing Components from Your View of a Page"
- Section 4.2.4, "Resizing Components"
- Section 4.2.5, "Collapsing and Expanding Components"

4.2.1 Rearranging Page Content

Using drag-and-drop or a component's **Actions** menu (Figure 4–1 and Figure 4–2), you can rearrange the positions of components on a page.

Figure 4–1 Actions Menu on an Events Task Flow

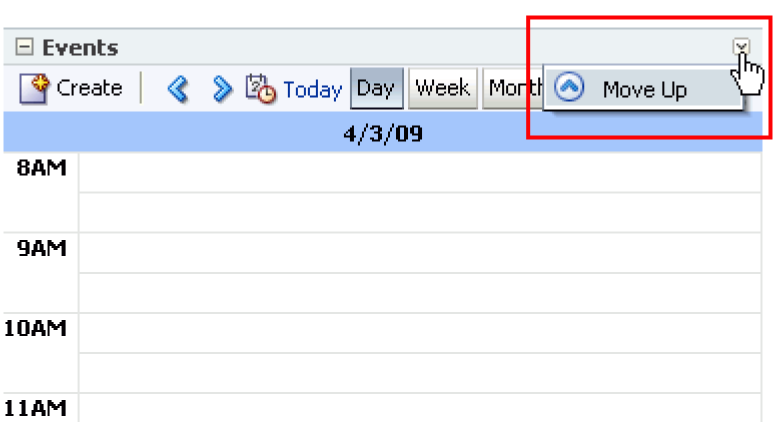
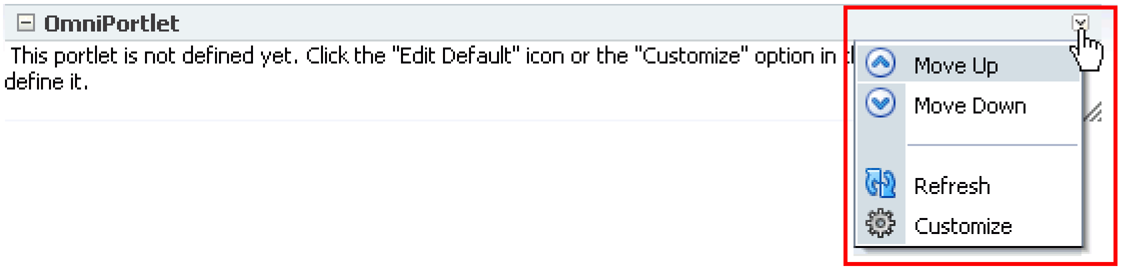


Figure 4–2 Actions Menu on an OmniPortlet



Components moved by drag-and-drop can be moved into any open position on a page. Components moved using their **Actions** menus can be moved within the layout box that contains them.

This section describes how to personalize your page view by rearranging components on a page. It contains the following subsections:

- Section 4.2.1.1, "Rearranging Components by Dragging and Dropping"
- Section 4.2.1.2, "Rearranging Components Using the Actions Menu"

4.2.1.1 Rearranging Components by Dragging and Dropping

Dragging and dropping is arguably the easiest and least restricted way to rearrange components on a page. Simply drag the component over the spot you want to place it. A solid box indicates a receptive drop location (Figure 4–3).

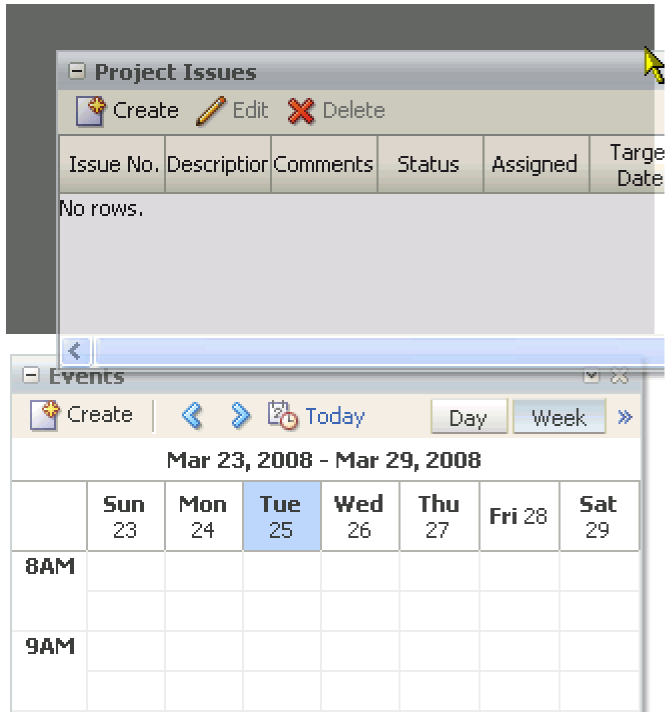
Figure 4–3 Solid Box Indicating a Receptive Drop Location

To rearrange components by dragging and dropping:

1. Log in, and go to the page where you want to rearrange components by dragging and dropping.
2. Click and hold on the header of the component you want rearrange, drag it to its target position, and drop it onto the page.

   A solid box indicates where the component is placed when you drop it (Figure 4–4).

Figure 4–4 Dragging an Issues List Above an Events Task Flow

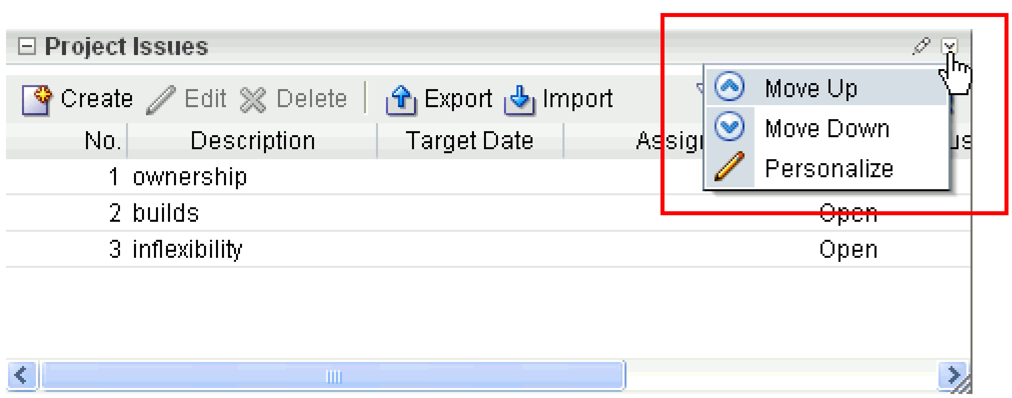


4.2.1.2 Rearranging Components Using the Actions Menu

Within a given layout box, the direction that components can move is determined by how the box is oriented. A box can be oriented vertically or horizontally. Vertical orientation allows for moving components higher or lower in the stack of components contained in the layout box. Horizontal orientation allows for moving components further left or right in the line of components contained in the layout box.

A component's **Actions** menu (Figure 4–5) provides a convenient way to reposition the component relative to other components contained in a given layout box. The **Actions** menu may appear in the component header, or it may not appear at all.

Figure 4–5 An Actions Menu Invoked from a Task Flow Header



A component may be configured to hide its **Actions** menu, in which case, you cannot reposition the component through the **Actions** menu—though you may be able to reposition other components relative to it, provided those other components show their **Actions** menus.

To rearrange components using a component's **Actions** menu:

1. Log in, and go to the page where you want to rearrange components using the **Actions** menu.
2. Click the **Actions** icon on the menu bar in the component header (see Figure 4–5).
3. Select a Move option:

   The moves available on a component **Actions** menu depend on how the layout box that contains the components is oriented (vertically for **Move Up**/**Move Down**; horizontally for **Move Left**/**Move Right**). Additionally, the available moves depend on whether the component has any components left, right, above, or below it.

   - **Move Up**—Reposition over the component immediately above.
   - **Move Down**—Reposition over the component immediately below.
   - **Move Right**—Reposition to the right of the component to the right.
   - **Move Left**—Reposition to the left of the component to the left.

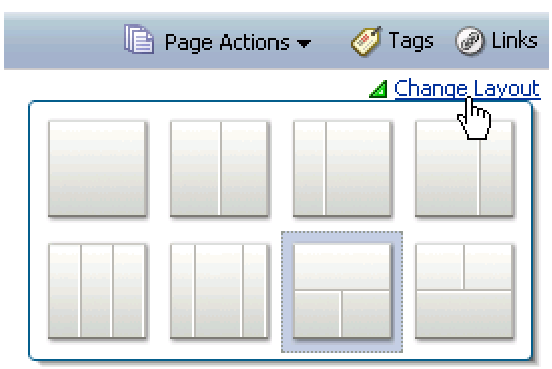
4.2.2 Changing Your Page Layout

Page designers can make a layout switcher available for changing your view of a page to a different page layout. If you see a **Change Layout** button or link on a page, you can personalize your page view by selecting a different layout model. This section tells you how.

To change to a different page layout:

1. Log in, and go to the page where you want to change your page layout.
2. Click the **Change Layout** link (Figure 4–6).

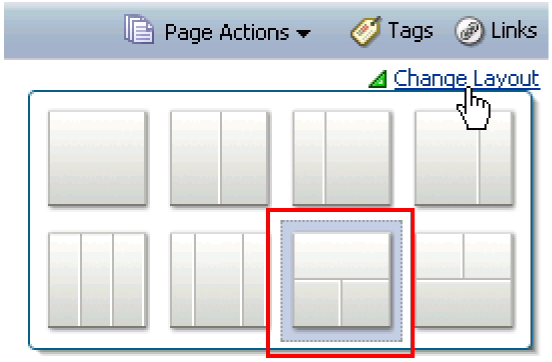
   Figure 4–6 Change Layout Link

   The link's default position is in the upper-right corner of the page. This may vary in your application. Page designers can hide this control, so it may not be available to you. Additionally, they can change the link label, so it may be something other than "Change Layout."
3. From the resulting pop-up, select a new page layout.

   The currently-selected layout is highlighted (Figure 4–7).

Figure 4–7 Current Selection in Change Layout Pop-Up



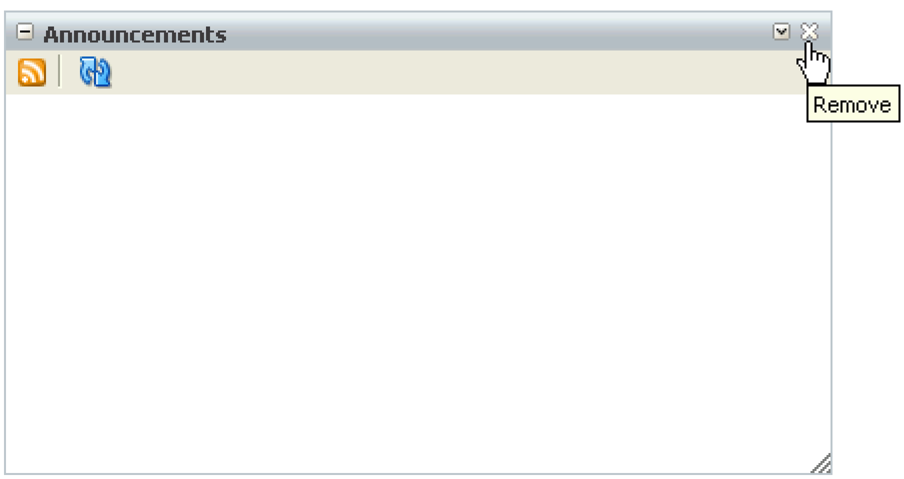
The page is rerendered using your selection for the new layout.

> **See Also:** For information about changing everyone's page layout, see Section 8.4.3, "Changing Everyone's Page Layout." For information about making the Change Layout link available in page view mode, see Section 9.3.9.3, "Working with Change Layout/Layout Customizable Properties."

4.2.3 Removing Components from Your View of a Page

If you find a component, such as a task flow or portlet, is not useful to you and the component displays a **Remove** icon (Figure 4–8), you can remove it from your view of the page.

Figure 4–8 Remove Icon on a Component Header



You can restore a removed component with the **Reset Layout** command on the **Page Actions** menu (for more information, see Section 4.3, "Removing Your Page Personalizations")—provided the component was seeded on the original page—or by editing the page and adding a new component instance (for more information, see Section 10.1, "Adding Content to a Page").

To remove a component from your view of a page:

1. Log in, and go to the page where you want to remove a component from your page view.

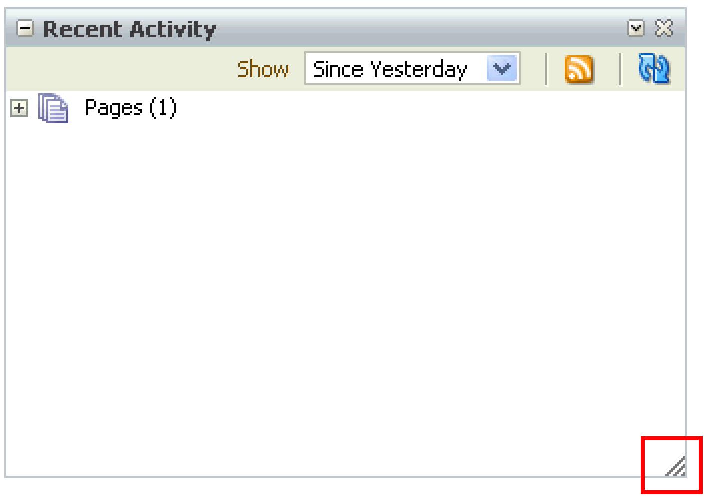
2. Click the **Remove** icon on the component header (see Figure 4–8).

   The component is removed from your view of the page.

4.2.4 Resizing Components

The border and header surrounding a component, such as a task flow or a portlet, is also known as *chrome*. Chrome not only delineates the component, but also provides 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 includes a **Resize** handle that you can use to increase or decrease the height of the component (Figure 4–9).

Figure 4–9 Resize Handle on Task Flow Chrome



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 opposite side depicted in Figure 4–9.

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.

4.2.5 Collapsing and Expanding Components

With one click, you can collapse some components, such as task flows or portlets, so that they roll up like a window shade, leaving only their headers in view (Figure 4–10).

Figure 4–10 A Collapsed/Minimized Task Flow

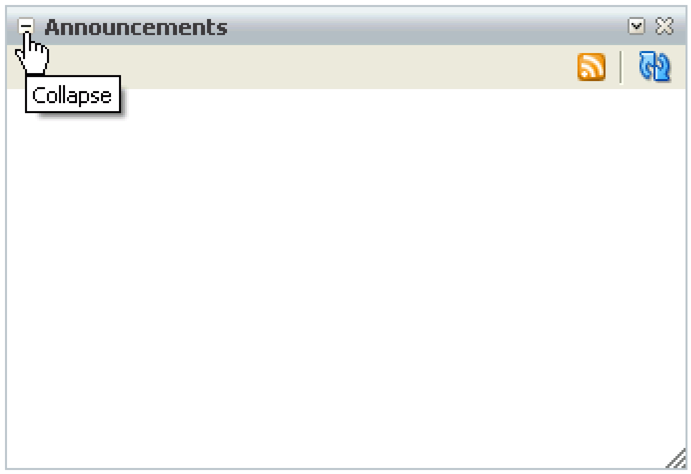
With another click, you can expand a collapsed component.

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

To collapse and expand components:

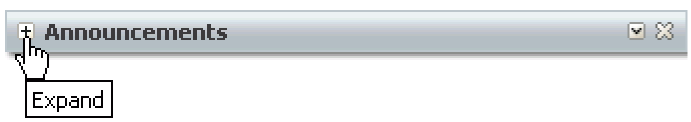
1. Log in, and go to the page you want to personalize.
2. Click the **Collapse** icon on the component header to roll the component up like a window shade (Figure 4–11).

Figure 4–11 The Collapse Icon on a Task Flow Header



3. Click the **Expand** icon on the component header to restore the full component to view (Figure 4–12).

Figure 4–12 The Expand Icon on a Task Flow Header



4.3 Removing Your Page Personalizations

If you have the *Personalize* privilege on a page, you can use the **Reset Layout** command on the **Page Actions** menu to remove all the personalizations you made to the page. Collapsed components are expanded; resized components are returned to their original dimensions; rearranged components are returned to their original positions; and removed components are restored to view.

> **See Also:** For information about WebCenter Spaces seeded user roles and permissions, see the "Default Policy Store Permissions for WebCenter Spaces" section in the *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter*.

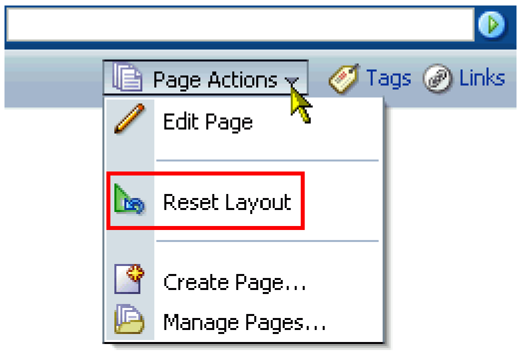
Because personalizations are easy to do, resetting the page layout provides a safe, efficient way to undo try-outs, such as removing a rarely-used task flow or repositioning components for easier access. If a personalization does not work out, simply reset the page layout, and re-do the personalizations you like.

> **Caution:** It is important to understand that **Reset Layout** removes all of your page personalizations in one operation. It does not back out of them one-by-one.

To reset a page layout:

1. Log in, and go to the page where you want to reset the page layout.
2. From the **Page Actions** menu, select **Reset Layout** (Figure 4–13).

Figure 4–13 Reset Layout Command on Page Actions Menu



> **Note:** If the **Page Actions** menu does not appear, it is likely that you do not have sufficient page access privileges. If this is the case, ask your application administrator for the privilege to edit pages. For more information, see Section 2.8, "Contacting Your Application Administrator."

3. In the resulting confirmation dialog, click the **Reset** button.

   The page is refreshed with all of your personalizations removed.

4.4 Working with the WebCenter Spaces Sidebar

The WebCenter Spaces Sidebar provides easy access to many useful services. This section provides information about the Sidebar and describes what you can do with it. It contains the following subsections:

- Section 4.4.1, "What You Should Know About the Sidebar"
- Section 4.4.2, "Toggling Sidebar Views"
- Section 4.4.3, "Hiding and Showing Task Flows in the Sidebar"
- Section 4.4.4, "Opening Task Flows from the Sidebar"
- Section 4.4.5, "Jumping to a Task Flow Main View from the Sidebar"

4.4.1 What You Should Know About the Sidebar

The Sidebar offers quick access to your WebCenter Spaces mail, watched discussion topics and forums, worklist assignments, personal contacts, recent documents, enterprise applications, and other useful functions.

> **Note:** Your WebCenter Spaces administrator controls which task flows appear in the Sidebar and the order in which they appear. Accordingly, your view of the Sidebar may vary from the examples presented here.

Everything that appears in the WebCenter Spaces Sidebar is personal. Your view of the Sidebar is unique to you.

You can view the Sidebar as an expandable list of task flows or as a set of individual task flow icons (Figure 4–14). Additionally, you can hide the Sidebar from view (for more information, see Section 4.4.2, "Toggling Sidebar Views").

Figure 4–14 Sidebar List and Icon Views

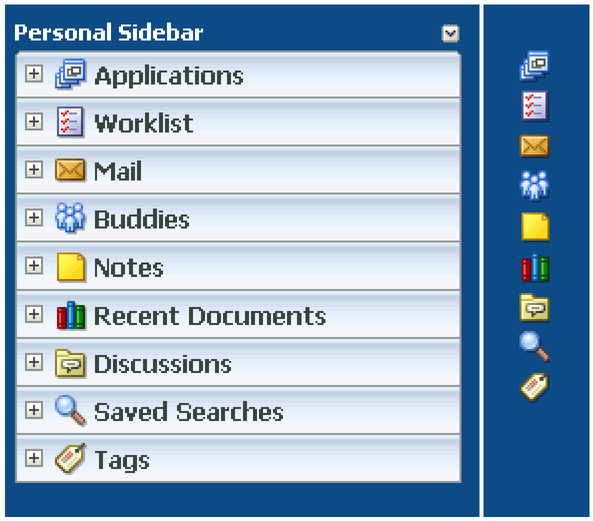


Table 4–1 lists the Sidebar icons and briefly describes the purpose of the task flow or application each icon represents.

Table 4–1 Sidebar Icons

Icon	Name	Provides Easy Access to ...
	Applications	External applications and custom task flows registered with WebCenter and accessible to you For more information about external applications, see Section 4.5, "Working with External Applications."
	Worklist	The Worklist, which contains notifications and action items assigned to you For more information about the Worklist, see Chapter 31, "Working with the Worklist Service."
	Personal mail inbox	Your email For more information about WebCenter Mail, see Chapter 23, "Working with the Mail Service."
	Buddies	Your personal contacts list (your chat buddies) For more information about the Buddies list, see Section 20.2.6, "Working with the Buddies List."
	Personal notes	Your personal notes, which are somewhat comparable to electronic post-it notes. For more information about Notes, see Chapter 24, "Working with the Notes Service."

Table 4–1 (Cont.) Sidebar Icons

Icon	Name	Provides Easy Access to ...
	Recent Documents	The last documents you accessed, created, or interacted with in some way Click a document link to open the document. For more information about the Document Library, see Chapter 18, "Working with the Documents Service."
	Discussion forums	The discussion forums and forum topics on your Watch List For more information about discussion forums and watch lists, see Chapter 17, "Working with the Discussions Service."
	Saved searches	Your saved searches For more information about WebCenter Search, see Chapter 28, "Working with the Search Service."
	Personal tags	Tags you have added or the items you have tagged For more information, see Chapter 29, "Working with the Tags Service."

4.4.2 Toggling Sidebar Views

The WebCenter Spaces Sidebar has three states: expandable panes, icons, and hidden. This section describes how to move between each of these states.

To toggle between the Sidebar panes, Sidebar icons, and a hidden Sidebar:

1. Log in, and, assuming you are starting with the Sidebar in icon view, click the **Expand** icon to the lower right of the Sidebar (Figure 4–15) to open the Sidebar in list view (Figure 4–16).

Figure 4–15 Collapse and Expand Icons

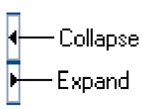
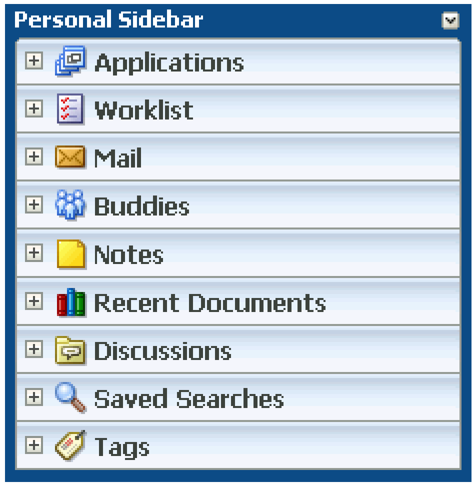
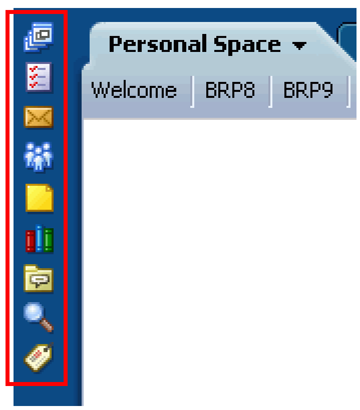


Figure 4–16 Sidebar List View



2. Click the **Collapse** icon to return to icon view (Figure 4–17).

Figure 4–17 Sidebar Icon View



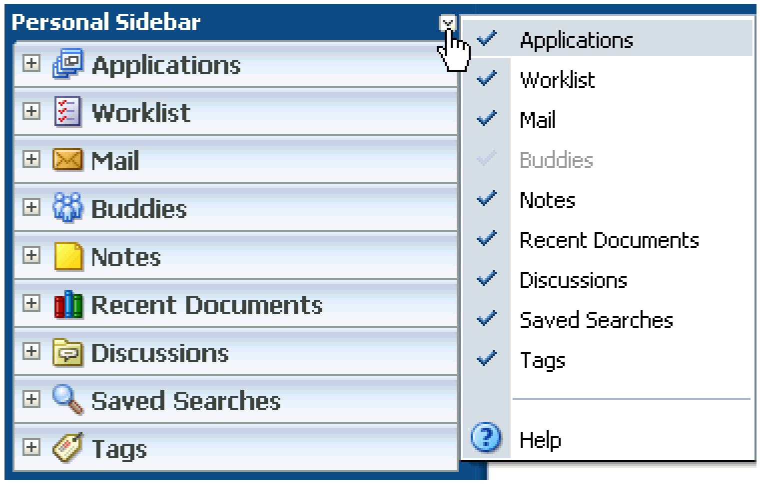
3. Click the **Collapse** icon to hide the Sidebar.
4. Click the **Expand** icon to return the Sidebar to icon view.

4.4.3 Hiding and Showing Task Flows in the Sidebar

Although your application administrator determines the task flows that appear by default in your Sidebar, you have the power to hide or show any task flow that is available to you. At different times, you may find some task flows more useful than others. WebCenter Spaces provides the means to place the ones that are not currently useful to you out of view.

It is easy to hide or show task flows in your Sidebar. Toggle to Sidebar list view (for more information, see Section 4.4.2, "Toggling Sidebar Views"), and select or deselect the task flows you want to hide or show from the **Hide or show Sidebar panels** list (Figure 4–18).

Figure 4–18 The Hide or Show Sidebar Panels List

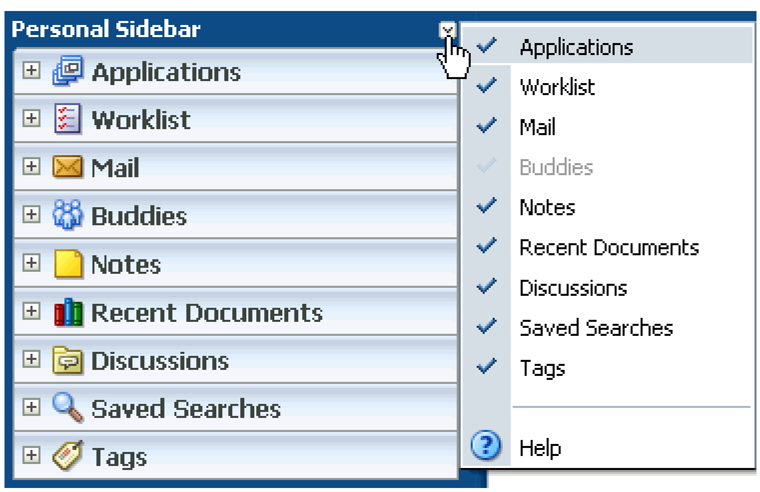


When you toggle back to the Sidebar's icon view, the task flows you hid in list view remain hidden.

To hide or show task flows in the Sidebar:

1. Log in, and toggle the Sidebar to list view.
2. Expand the list of task flows at the top of the Sidebar (Figure 4–19), and click a task flow to show it (checked), or deselect it to hide it (unchecked).

Figure 4–19 The List of Sidebar Task Flows



4.4.4 Opening Task Flows from the Sidebar

The task flows that appear in the Sidebar may be in a state that requires a simple step to move from closed to open. They might be collapsed, they might be displayed as icons, or they might be displaced by other open task flow panels. This section describes how to open a task flow from the Sidebar.

To open task flows from the Sidebar:

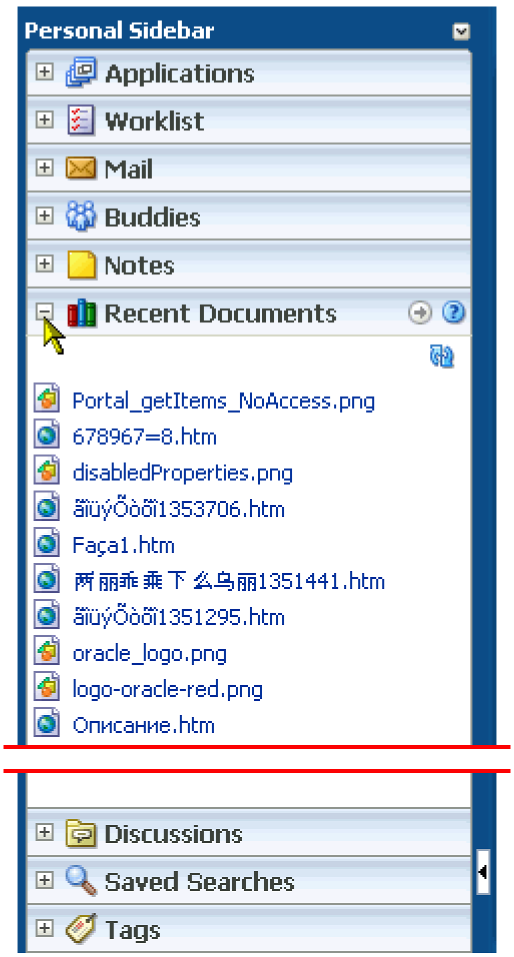
1. Log in to WebCenter Spaces.

2. If the Sidebar is rendered as a list, go to the task flow you want to view, and, if necessary, expand it by clicking its **Show this panel** icon in the panel header.

    See Also: For more information about the WebCenter Spaces Sidebar, see Section 4.4.1, "What You Should Know About the Sidebar."

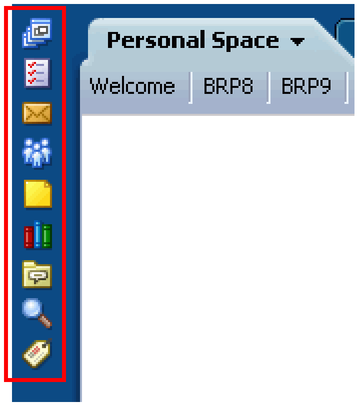
    The task flow opens within the context of the Sidebar (Figure 4–20).

Figure 4–20 The Documents Task Flow Opened in the Sidebar



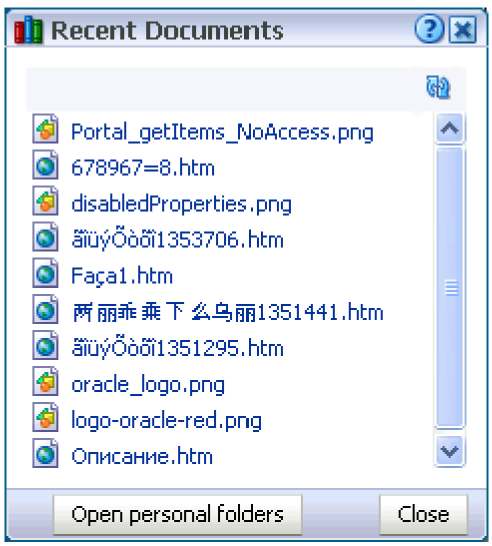
If the Sidebar is rendered as icons (Figure 4–21), click the icon associated with the task flow you want to view (for a description of task flow icons, see Table 4–1).

Figure 4–21 Sidebar Icons



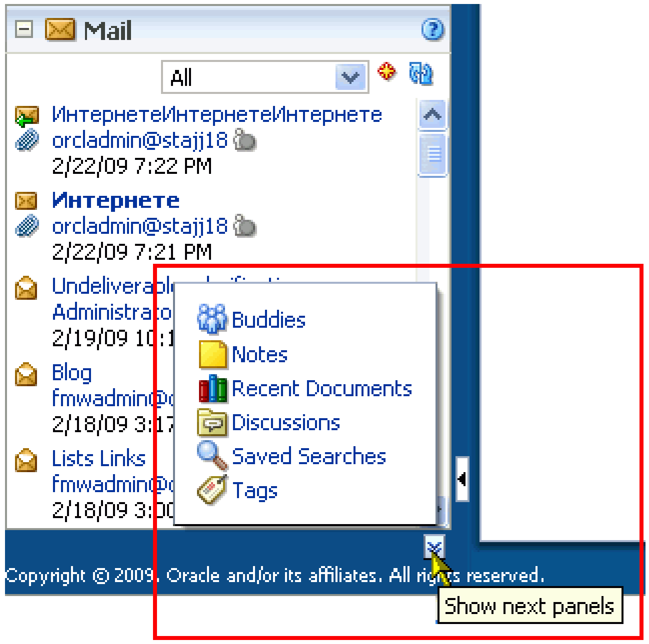
The task flow opens in its own, undocked view (Figure 4–22).

Figure 4–22 The Undocked View of the Recent Documents Task Flow from the Sidebar



If the task flow is displaced by other open task flow panels, click the **Show next panels** icon to open and select from a list of displaced task flows (Figure 4–23).

Figure 4–23 Show Next Panels List

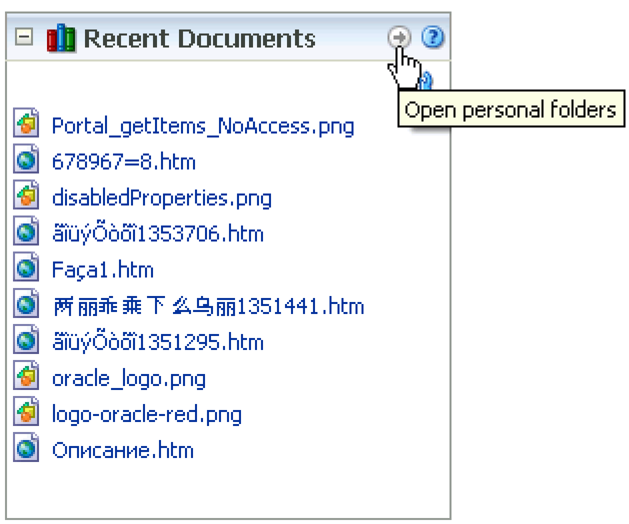


4.4.5 Jumping to a Task Flow Main View from the Sidebar

Some Sidebar task flows provide instant navigation to a main task flow view. When the Sidebar is shown as a list of expandable panels, an icon may appear in the header of an expanded panel. Click the icon to jump to a main view of the task flow.

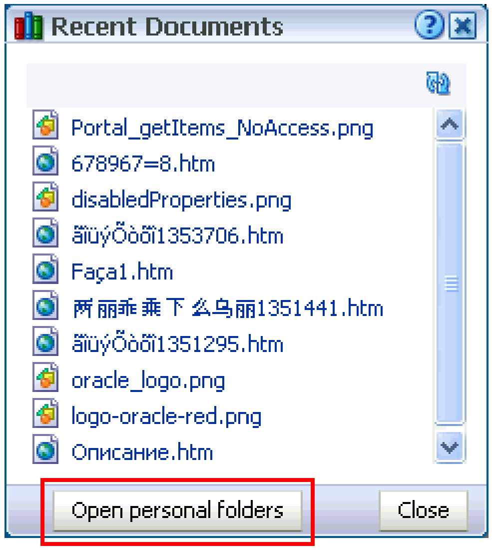
For example, Figure 4–24 shows the **Open personal folders** icon on the Recent Documents panel in the Sidebar.

Figure 4–24 The Open Personal Folders Icon on the Recent Documents Panel



With an undocked view of a Sidebar task flow, the navigation appears as a button (Figure 4–25).

Figure 4–25 The Open Personal Folders Button on the Recent Documents Panel



By default, the following task flows provide navigation to main task flow views from the Sidebar:

- Recent Documents—Navigates to the **Documents** page in your personal space.
- Saved Searches—Navigates to a dynamically-generated, top-level **Search** page.
- Tags—Navigates to the dynamically-generated, top-level Tag Center.

4.5 Working with External Applications

The WebCenter Spaces administrator may expose different enterprise applications in the Sidebar's Applications pane. This provides login management and convenient access through WebCenter Spaces to your frequently used enterprise applications.

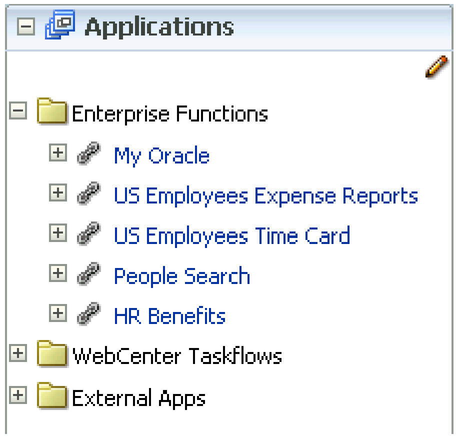
This section provides information about the Applications pane in the Sidebar. It contains the following subsections:

- Section 4.5.1, "What You Should Know About External Applications"
- Section 4.5.2, "Logging In to an External Application"
- Section 4.5.3, "Personalizing the Applications Pane"
- Section 4.5.4, "Managing Your External Application Login Credentials"

4.5.1 What You Should Know About External Applications

The **Applications** pane in the Sidebar (Figure 4–26) provides quick access to your most frequently-used enterprise applications.

Figure 4–26 The Applications Pane in the Sidebar



These can include such applications as your enterprise expense reporting system, human resources-related request applications, time-reporting, company directory, and the like.

The **Applications** pane is personal. The applications that are shown in the pane are those you can access using an application login.

External applications require login credentials, such as your user name and password. You can supply login credentials each time you access an application, or you can let WebCenter Spaces store and manage your login credentials (for more information, see Section 3.6, "Providing Login Information for External Applications"). After your credentials for a particular application are stored, you are logged in to that application automatically when you log in to WebCenter Spaces.

Your WebCenter administrator manages the presentation and range of applications available in the **Applications** pane. If an application you access frequently is not listed, ask your WebCenter administrator to add it for you.

> **See Also:** For more information about adding applications to the Applications pane, see *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter*.
>
> For more in-depth information about external applications, see *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter*.
>
> For information about contacting your application administrator, see Section 2.8, "Contacting Your Application Administrator."

4.5.2 Logging In to an External Application

To access and log in to an external application:

> **Note:** Due to browser limitations, automated login is not supported for external applications using BASIC authentication.
>
> Login to external applications that do not support UTF-8 encoding is not supported.

1. Log in, and, in the Sidebar, either expand the **Applications** pane or click the **Applications** icon (Figure 4–27).

Figure 4–27 The Applications Icon

See Also: For information about the Sidebar, see Section 4.4, "Working with the WebCenter Spaces Sidebar."

2. Click an application link.
3. If a login form opens (similar to that shown in Figure 4–28):

Figure 4–28 Logging in to External Applications

a. Enter your login credentials in the fields provided.

b. Select **Remember my login information** to save your user name, password, and any other login credentials you have entered.

   The next time you launch the application from the Applications pane you login automatically.

   If you do not select the option **Remember my login information**, the login information you enter here is used for this session only. The next time you access this application through the **Applications** pane, you must reenter your login credentials.

   Note: If you change your application account information—for example, change your application password—you can update the login credentials you entered here through your WebCenter Spaces preferences. For more information, see Section 4.5.4, "Managing Your External Application Login Credentials."

   ---

c. Click **Login** to log in.

4.5.3 Personalizing the Applications Pane

You may not want to see all the task flows and applications offered through the **Applications** pane. If this is the case, you can personalize your view by showing only the applications you use and hiding the applications you do not use. This section describes how.

To personalize the **Applications** pane:

1. Log in, and, in the Sidebar, either expand the **Applications** pane, or click the **Applications** icon (Figure 4–29).

Figure 4–29 The Sidebar Applications Icon

> **See Also:** For information about the Sidebar, see Section 4.4, "Working with the WebCenter Spaces Sidebar."

2. In the **Applications** pane, click the **Personalize applications** icon (Figure 4–30) at the top of the pane.

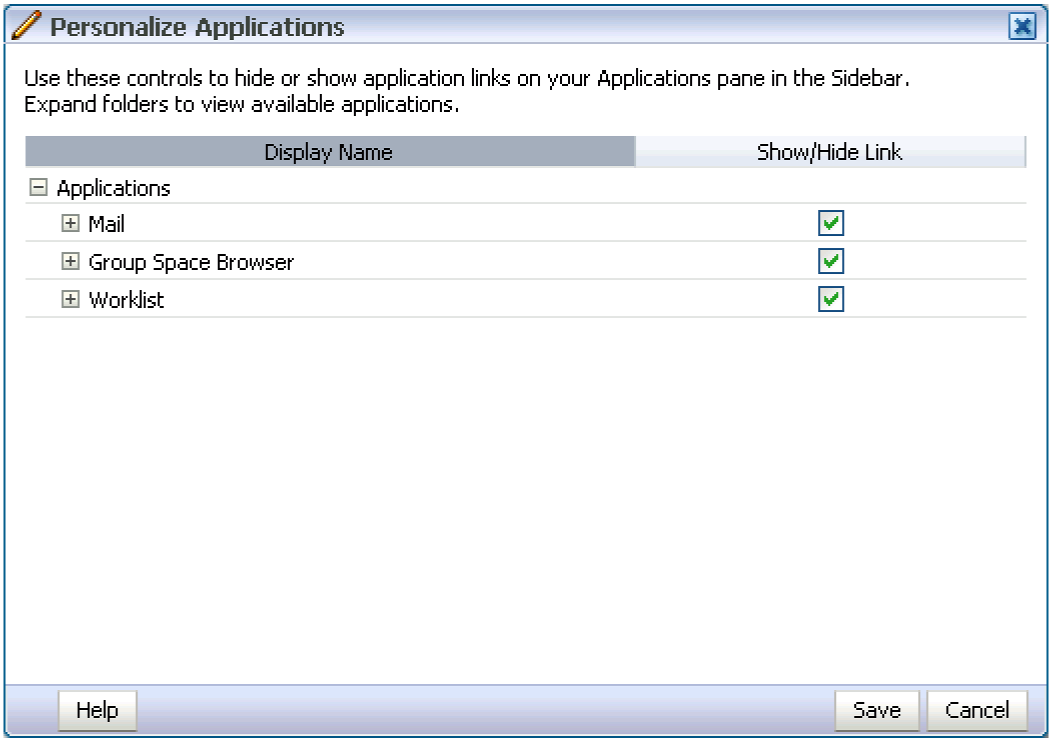
Figure 4–30 The Personalize Icon in the Applications Pane

If your Sidebar is open in icon view, click the **Applications** icon and select **Personalize applications** from the resulting menu (Figure 4–31).

Figure 4–31 The Personalize Applications Option

The **Personalize Applications** window opens, listing all external applications available to you (Figure 4–32).

Figure 4–32 The Personalize Applications Window



3. The next step you take depends on what you want to accomplish:
   - To hide an application link, clear its **Show/Hide Link** checkbox.
   - To show an application link, select its **Show/Hide Link** checkbox.

   Note: You cannot hide links to applications that your WebCenter administrator has *locked*. Locked applications always appear, and their **Show/Hide Link** checkboxes cannot be selected (they are grayed out).

   ---

4. Click **Save** to save your changes and return to the **Applications** pane.

   The applications you cleared no longer appear. The applications you checked now appear.

4.5.4 Managing Your External Application Login Credentials

WebCenter Spaces Preferences provide a central place for you to manage and store login credentials for all the enterprise applications you access through WebCenter Spaces. You need only enter credentials for your password-protected applications once. WebCenter Spaces stores your login details; so the next time you access the application through the Sidebar, you login automatically.

If you prefer, you can provide login credentials before you launch the application in WebCenter Spaces. You can also change your stored login credentials if you change them in the original application.

For more information, see Section 3.6, "Providing Login Information for External Applications."

5 Creating and Managing Favorites

Use Favorites to keep your own personal list of links to favorite WebCenter Spaces pages and to external web sites. This section describes how to create, organize, and manage a list of personal favorites. It contains the following subsections:

- Section 5.1, "What You Should Know About Favorites"
- Section 5.2, "Adding Favorites"
- Section 5.3, "Adding Favorites Folders"
- Section 5.4, "Managing Favorites"

Audience

This chapter is intended for users who want to optimize their WebCenter Spaces environment for their personal use. This includes selecting a display language, providing application login information, and arranging content on the page. This chapter is also intended for users who want a better understanding of the Sidebar.

The WebCenter Spaces application administrator has the authority to expose or hide a particular service's task flows. Tasks discussed in this chapter are not available to you if the relevant service is hidden.

5.1 What You Should Know About Favorites

The great advantage to WebCenter Spaces Favorites is their portability. They are not dependent on a particular web browser, so any browser you use to access your WebCenter Spaces application provides access to your WebCenter Spaces Favorites. You can create favorite links to sites internal or external to WebCenter Spaces. This makes WebCenter Spaces 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 not associated with the space that was open when you created them. That is, when you move from your personal space to a group space or from one group space to another, the favorites on the **Favorites** menu stay the same.

WebCenter Spaces provides a **Manage Favorites** window, which you can use to further personalize your favorites. Use the **Manage Favorites** window 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** window, see Section 5.4, "Managing Favorites."

5.2 Adding Favorites

Add favorite links for quick access to your most frequently used web sites and to WebCenter Spaces pages. 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** window. For more information, see Section 5.4.1, "Adding a Favorite Through the Manage Favorites Window."

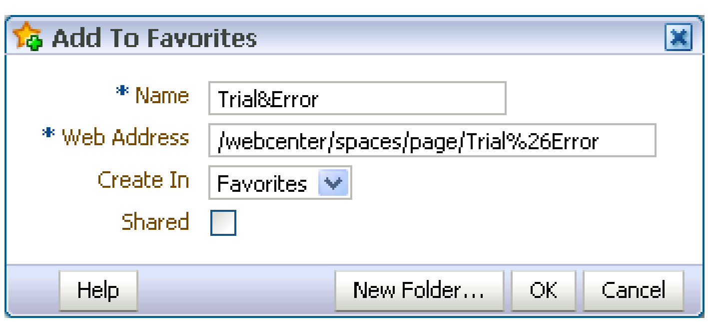
To add a favorite:

1. The way you obtain your favorite's URL differs depending on the circumstances:
   - For pages external to WebCenter Spaces, go to a favorite web location and copy its URL.
   - For WebCenter Spaces pages, log in and go to the page you want to make a favorite.
   - If you know the URL, enter it manually when the time comes.
2. Log in, and, from the **Favorites** menu at the top of the application, select **Add to Favorites** (Figure 5–1).

Figure 5–1 Add to Favorites on the Favorites Menu

3. In the **Name** field of the Add To Favorites dialog (Figure 5–2), enter a name for the favorite.

Figure 5–2 Add To Favorites Dialog



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 Spaces page; you have three options:

   - Leave the default entry 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.

   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 5.3, "Adding Favorites Folders."

6. To allow this favorite to be discovered by other users during a search, select the **Shared** check box.

   Clear the **Shared** check box if you do not want other users to have any kind of access to this favorite.

7. Click **OK** to add the favorite to the **Favorites** menu and the **Manage Favorites** window.

5.3 Adding Favorites Folders

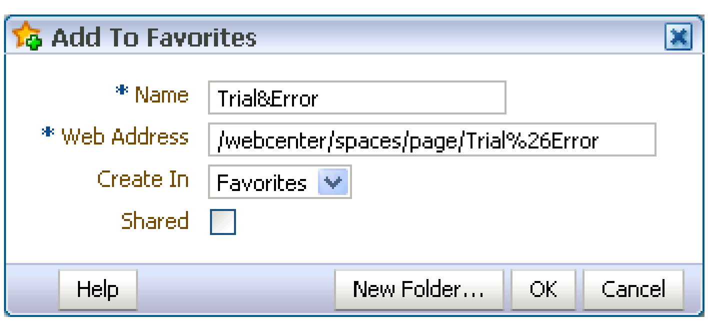
To keep your list of favorites manageable, you can organize them into folders. The folder hierarchy you create appears on the **Favorites** menu and in the **Manage Favorites** window. Because the favorite folders you create are personalizations, they display only in your application view and not in any other user's.

> **Note:** This section describes one way to create favorites folders. You can also create them in the **Manage Favorites** window. For more information, see Section 5.4.3, "Editing Favorites and Favorites Folders."

To add a favorites folder:

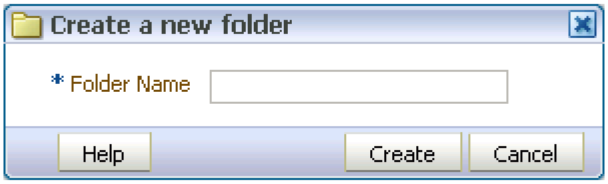
1. Log in, and, from the **Favorites** menu at the top of the application, select **Add to Favorites** to open the Add to Favorites dialog (Figure 5–3).

Figure 5–3 Add To Favorites Dialog



2. Click the **New Folder** button to open the Create a new folder dialog (Figure 5–4).

Figure 5–4 The Create a New Folder Dialog



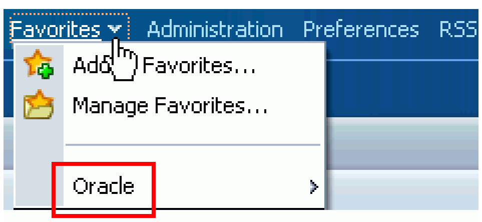
3. In the **Folder Name** field, enter a name for the new folder.
4. Click **OK** to save the new folder and close the Create a new folder dialog.

   The new folder appears as a selection in the Add To Favorites dialog on the **Create In** pick list.
5. Click **OK** to close the Add To Favorites dialog.

   Alternatively, before exiting the Add To Favorites dialog, add a new favorite to the new, selected folder. For more information, see Section 5.2, "Adding Favorites."

   The new folder now appears as a selection on the **Favorites** menu (Figure 5–5).

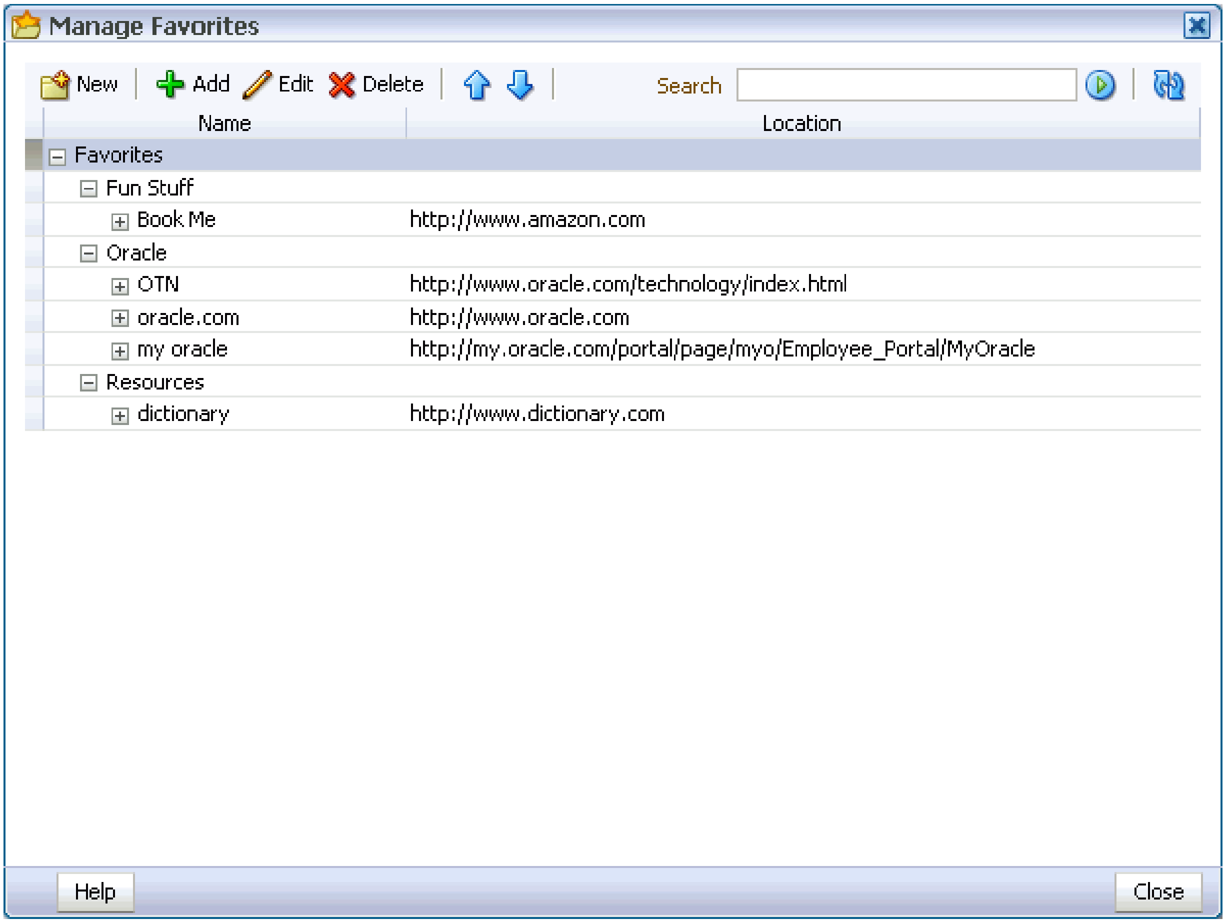
Figure 5–5 A New Folder (Oracle) on the Favorites Menu



5.4 Managing Favorites

The WebCenter Spaces **Manage Favorites** window (Figure 5–6) 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 5–6 The Manage Favorites Window



This section describes how to use the controls available in the **Manage Favorites** window. It contains the following subsections:

- Section 5.4.1, "Adding a Favorite Through the Manage Favorites Window"
- Section 5.4.2, "Adding a Favorites Folder Through the Manage Favorites Window"
- Section 5.4.3, "Editing Favorites and Favorites Folders"
- Section 5.4.4, "Rearranging Favorites and Favorites Folders"
- Section 5.4.5, "Searching for Favorites"
- Section 5.4.6, "Deleting Favorites and Favorites Folders"

5.4.1 Adding a Favorite Through the Manage Favorites Window

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

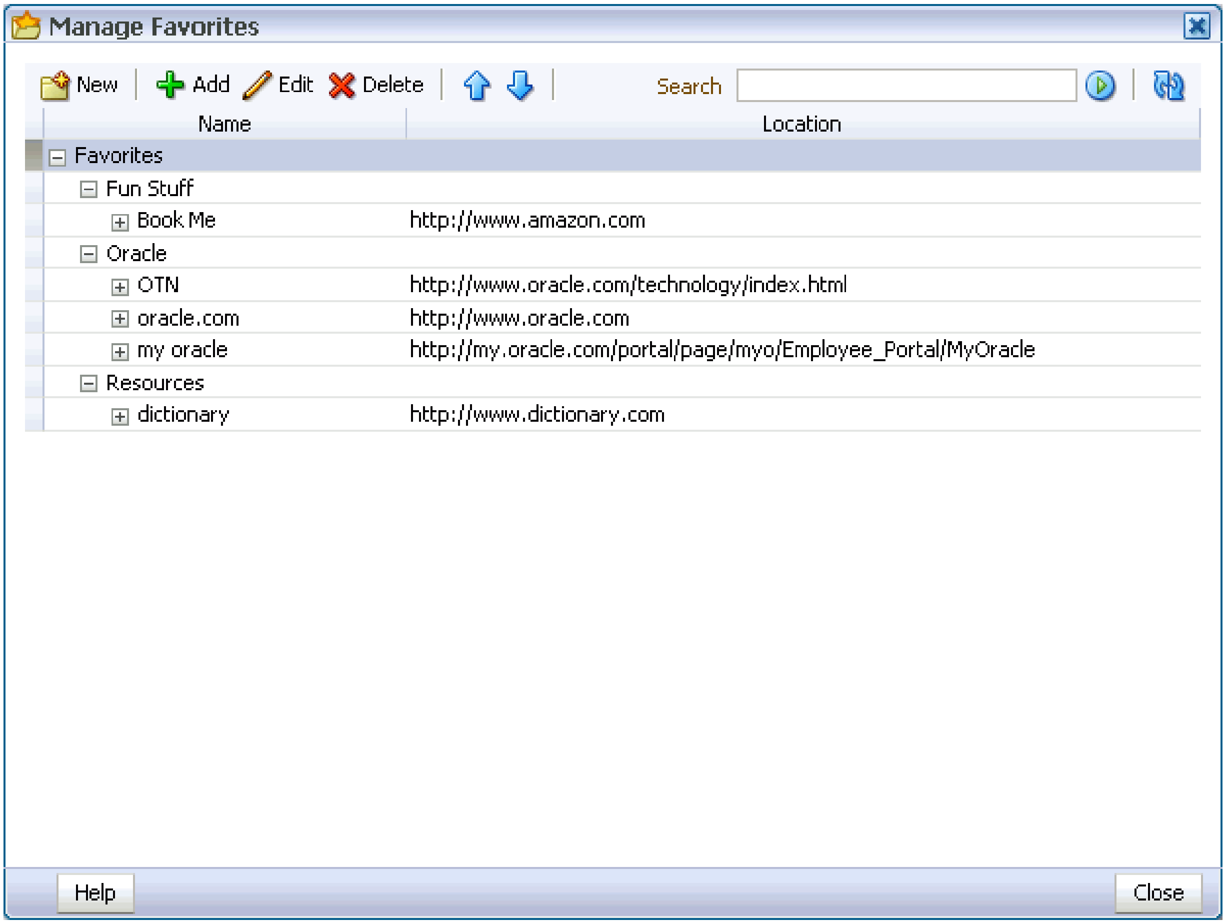
To add favorites through the **Manage Favorites** window:

1. Go to the web page you want to make a favorite, and copy its URL.

   You can skip this step if you plan to enter the URL manually.

2. Log in, open the **Favorites** menu at the top of the application, and select **Manage Favorites** to open the **Manage Favorites** window (Figure 5–7).

Figure 5–7 The Manage Favorites Window

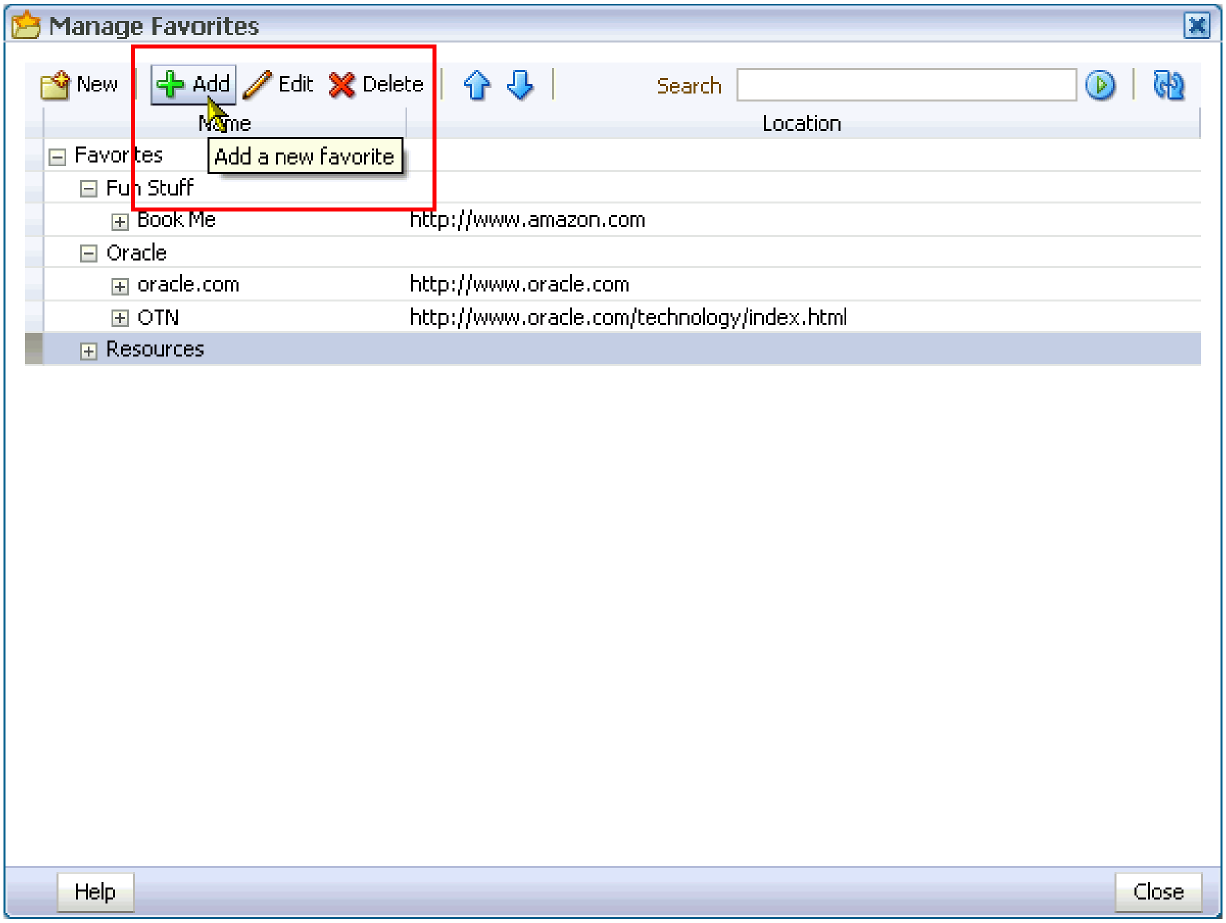


3. Select the folder to which you want to add the favorite.

   Select a folder by clicking in its row.

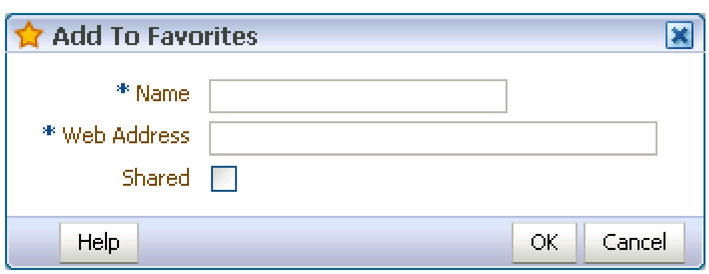
4. Click the **Add** button in the toolbar at the top of the window (Figure 5–8).

Figure 5–8 The Add Button in the Manage Favorites Window



5. In the resulting Add Favorites dialog (Figure 5–9), go to the **Name** field and enter a display name for the favorite.

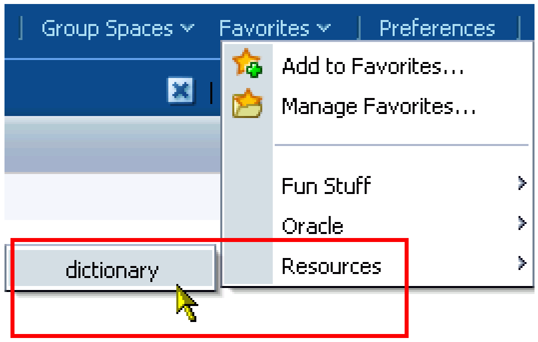
Figure 5–9 The Add To Favorites Dialog from the Manage Favorites Window



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** window and on the **Favorites** menu (Figure 5–10).

Figure 5–10 New Favorite on Favorites Menu



9. Click **Close** to exit the **Manage Favorites** window.

5.4.2 Adding a Favorites Folder Through the Manage Favorites Window

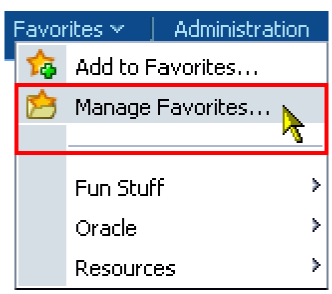
To keep your list of favorites manageable, you can organize them into folders. The folder hierarchy you create appears on the **Favorites** menu and in the **Manage Favorites** window. Because the favorite folders you create are personalizations, they display only in your application view and not in any other user's.

In addition to adding favorites folders through the Add To Favorites dialog (see Section 5.3, "Adding Favorites Folders") you can add them through the **Manage Favorites** window. This section describes how.

To add a favorites folder through the **Manage Favorites** window:

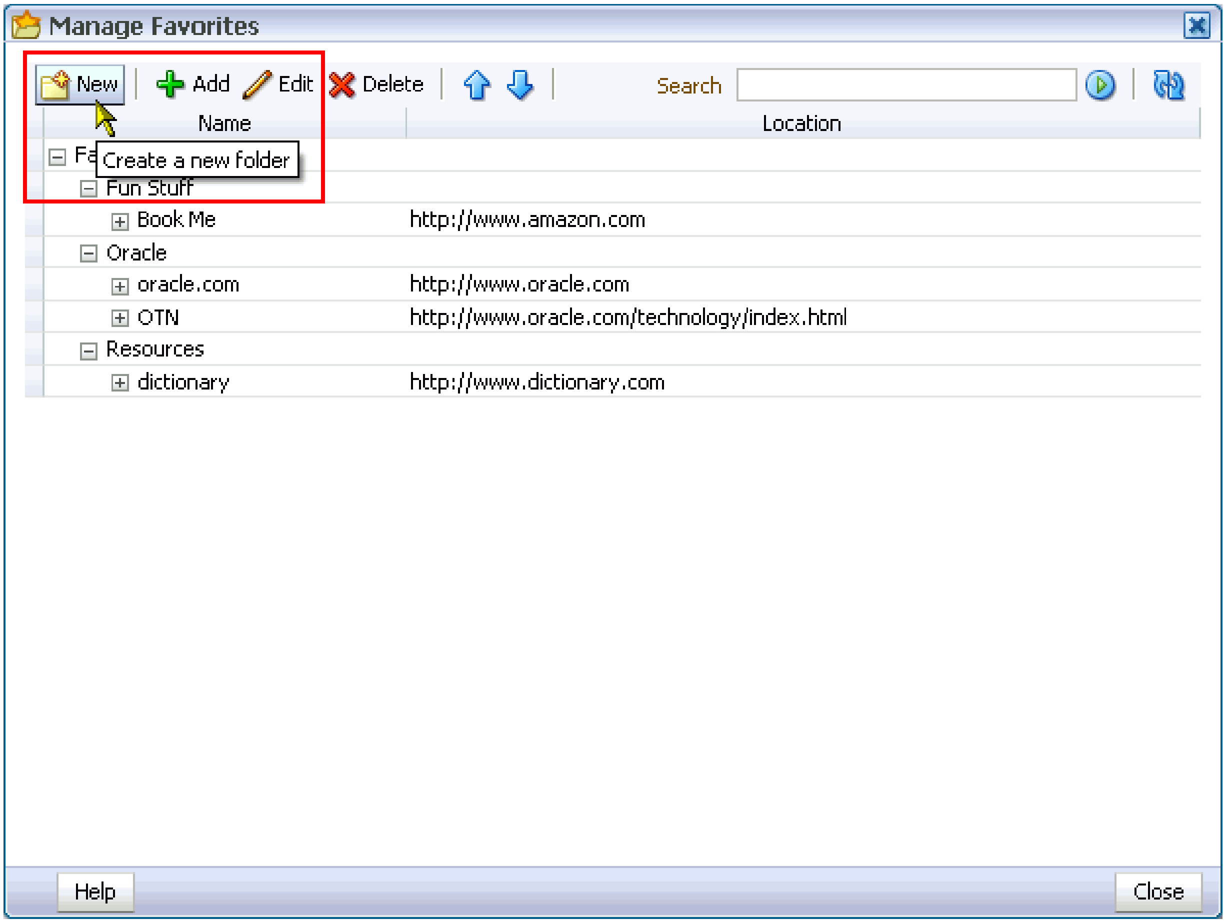
1. Log in, open the **Favorites** menu at the top of the application, and select **Manage Favorites** (Figure 5–11).

Figure 5–11 Manage Favorites on the Favorites Menu



2. In the resulting **Manage Favorites** window, 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 5–12).

Figure 5–12 New (Favorite Folder) Button in the Manage Favorites Window



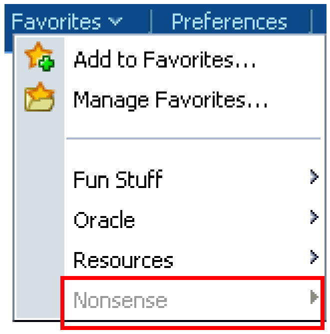
3. In the resulting Create a new folder dialog (Figure 5–13), go to the **Folder Name** field and enter a display name for the favorite. folder

Figure 5–13 The Create a New Folder Dialog from the Manage Favorites Window

4. Click **Create**.

   The new folder appears in the **Manage Favorites** window and on the **Favorites** menu (Figure 5–14).

Figure 5–14 New Favorite Folder on the Favorites Menu



5. Click **Close** to exit the **Manage Favorites** window.

5.4.3 Editing Favorites and Favorites Folders

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

Open behavior determines how a favorite target URL opens from the **Favorites** menu or the Manage Favorites dialog. Choose from opening a favorite target in the current browser window, in a new browser window, or on a new WebCenter Spaces tab.

> **Note:** The open behavior you specify for a Favorite does not apply to Favorites returned in a search. To control the open behavior of Favorites returned in a search, right-click the search result and select an open behavior from your browser's context menu.
>
> Open behavior does not affect WebCenter Spaces targets. Such pages always open as a tab in WebCenter Spaces. Open behavior affects URL targets outside the WebCenter Spaces context, such as www.google.com and the like.

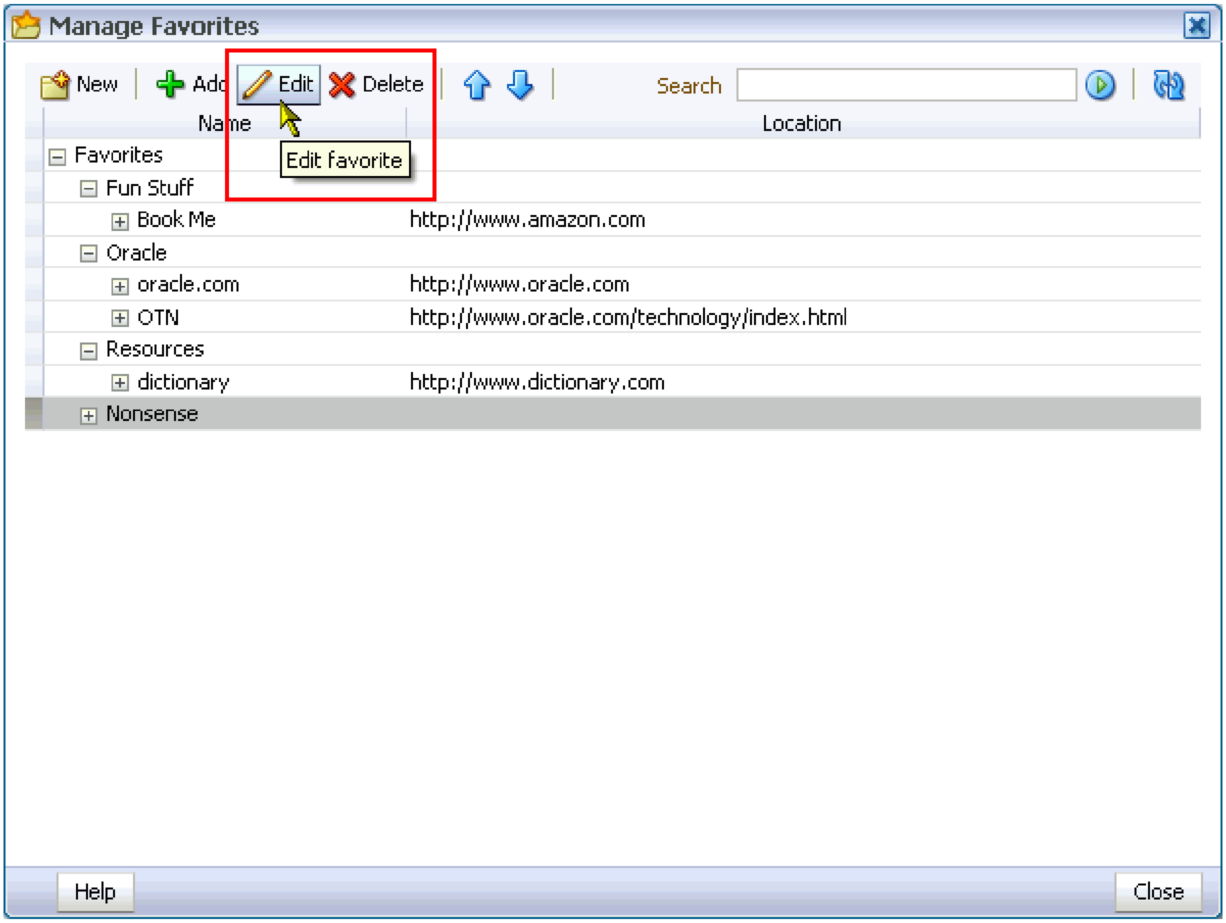
To edit a favorite or favorite folder:

1. Log in, and from the **Favorites** menu at the top of the application select **Manage Favorites** to open the **Manage Favorites** window.
2. If necessary, expand favorites folders to access the favorite or folder you want to edit.

   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 (Figure 5–15).

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

Figure 5–15 The Edit Button in the Manage Favorites Window



Depending on your selection, the **Edit Folder** (Figure 5–16) or Edit Favorite (Figure 5–17) dialog opens.

Figure 5–16 Edit Folder Dialog

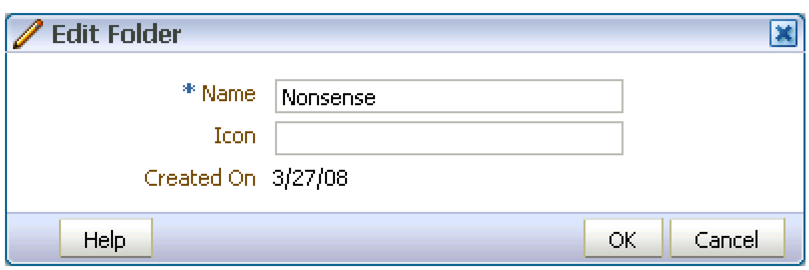


Figure 5–17 The Edit Favorite Dialog

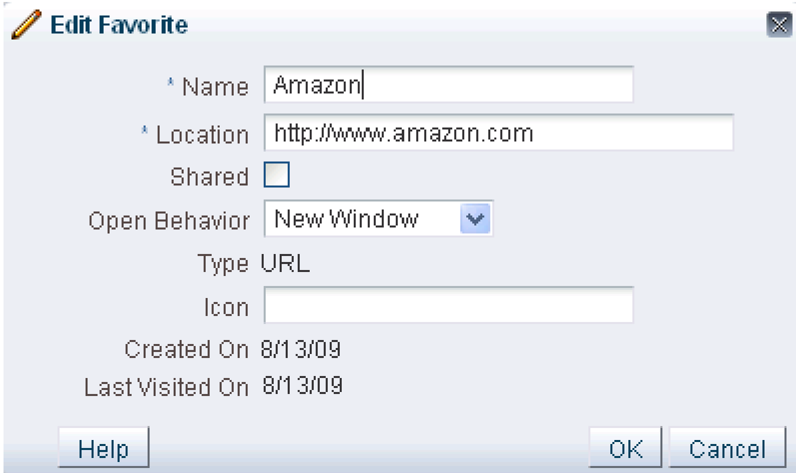


Table 5–1 lists and describes the types of values you can enter for either dialog.

Table 5–1 Values Taken By Edit Favorite and Edit Folder Dialogs

Label	Applies To	Value
Name	Favorite and Folder	The display name of the favorite or folder. This is the name that appears on the **Favorites** menu and in the **Manage Favorites** window. This field is editable.
Location	Favorite	The favorite target URL. This field is editable
Shared	Favorite	Specify whether to allow other users to discover this favorite through their search results. Checked means yes, cleared means no. This check box is editable.
Open Behavior	Favorite	An option for specifying how a favorite opens. Choose from: ■ **New Window**—The favorite opens in a new browser window. ■ **WebCenter Tab**—The favorite opens on a new WebCenter Spaces tab. For information about how to close the tab, see Section 2.5.5, "Closing Group Spaces and Other Top-Level Tabs." ■ **Current Window**—The current browser window redraws, displaying the favorite target. This field is editable. **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. Open behavior does not affect WebCenter Spaces targets. Such pages always open as a tab in WebCenter Spaces. Open behavior affects URL targets outside the WebCenter Spaces context, such as www.google.com and the like.

Table 5–1 (Cont.) Values Taken By Edit Favorite and Edit Folder Dialogs

Label	Applies To	Value
Type	Favorite	The link type, always URL. This field is read-only.
Icon	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. This field is editable.
Created On	Favorite and Folder	The date the favorite or folder was created. This field is read-only.
Last Visited On	Favorite	The date the favorite was last visited using the favorites link. This field is read-only.

4. Make your changes to the fields and pick lists.
5. Click **OK** to save your changes and close the window.

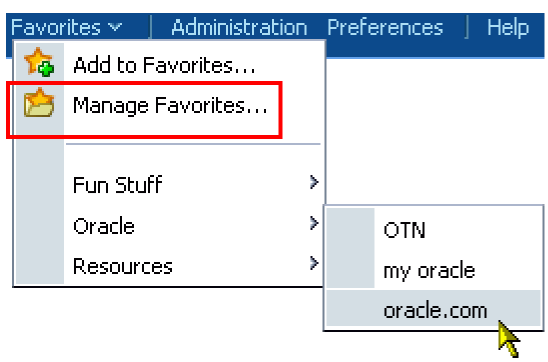
5.4.4 Rearranging Favorites and Favorites Folders

The **Manage Favorites** window provides controls for moving a favorite or a favorite folder higher or lower on 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. Log in, open the **Favorites** menu at the top of the application, and select **Manage Favorites** (Figure 5–18).

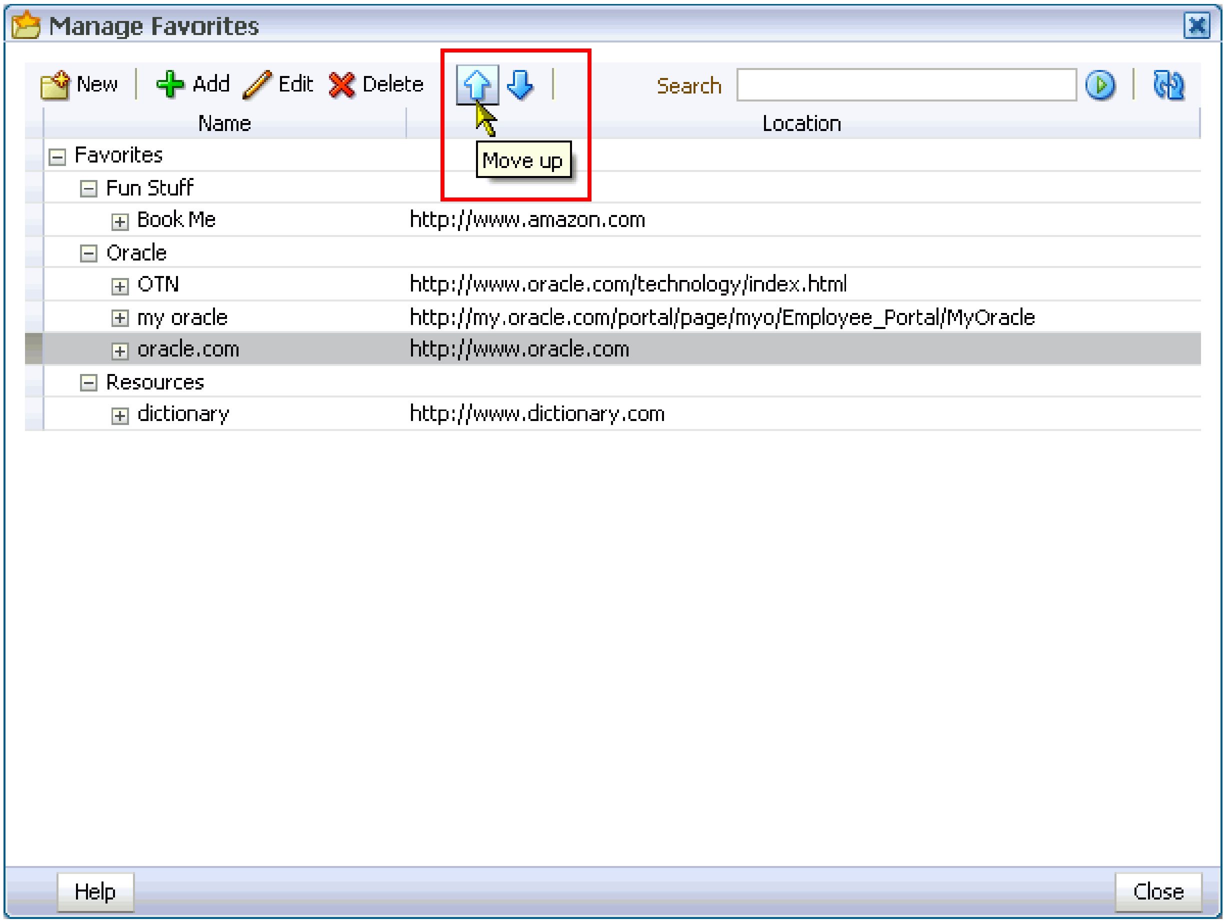
Figure 5–18 The Favorites Menu (Before)



2. If necessary, in the **Manage Favorites** window, expand favorites folders and then select the favorite or folder you want to rearrange.

   To select a favorite or a folder, click in its row.
3. Click the **Move Up** or **Move Down** icon in the Manage Favorites toolbar to rearrange the selected favorite or folder (Figure 5–19).

Figure 5–19 The Move Up and Down Icons on the Favorites Manager Toolbar



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

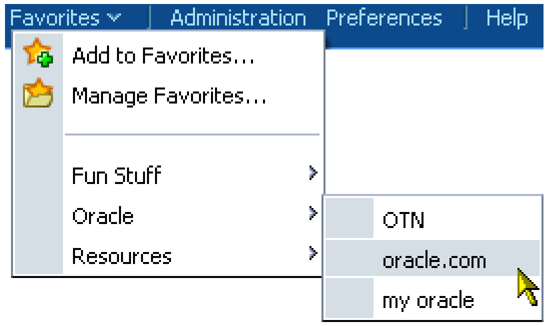
Accessibility Note: In WebCenter Spaces, you cannot move a favorite into an existing folder using only the keyboard. To work around this issue, create a duplicate favorite within the existing folder, then delete the original favorite.

---

4. Click **Close** to exit the **Manage Favorites** window.

   The favorite or folder is repositioned in the **Manage Favorites** window and on the **Favorites** menu (Figure 5–20).

Figure 5–20 The Favorites Menu (After)



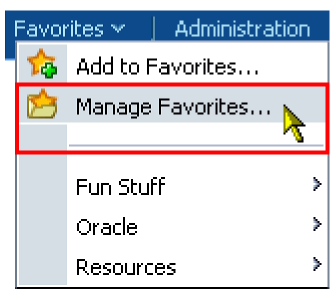
5.4.5 Searching for Favorites

The **Manage Favorites** window includes a search feature that enables you to locate favorites. You can use the favorites search feature to search for favorite display names or target URLs. This search feature does not search for favorite folder names. Search results display in the **Manage Favorites** window.

To search for favorites:

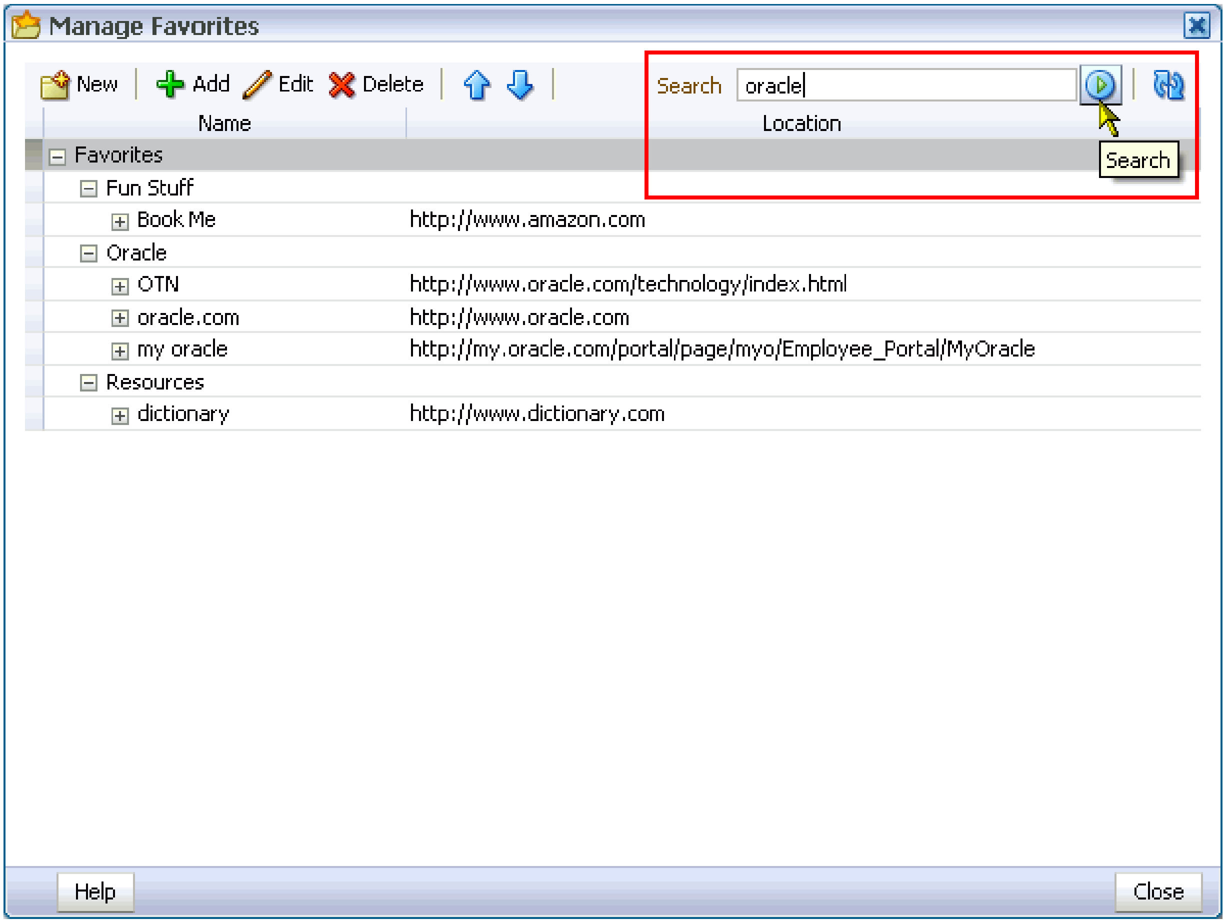
1. Log in, open the **Favorites** menu at the top of the application, and select **Manage Favorites** (Figure 5–21).

Figure 5–21 The Favorites Menu



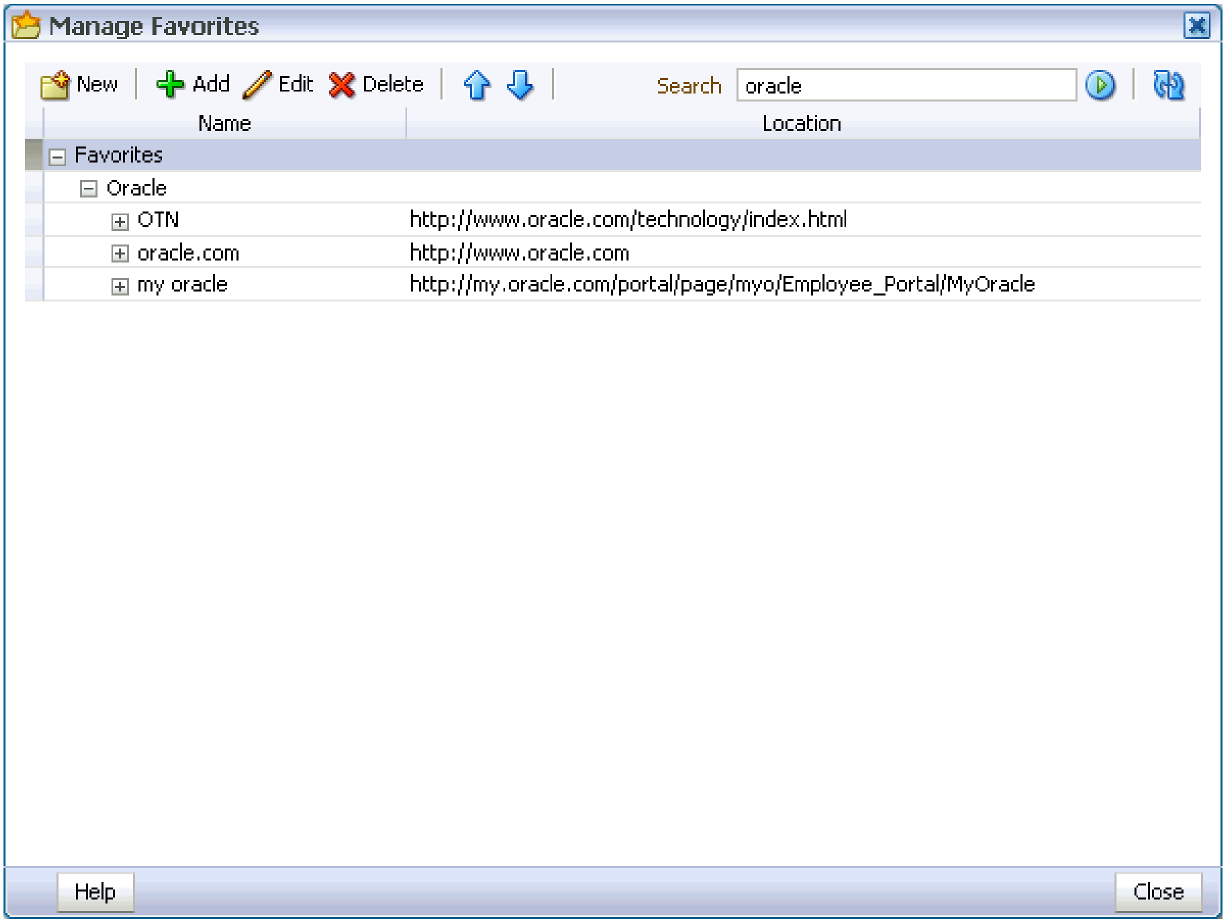
2. In the resulting **Manage Favorites** window, enter a search term in the **Search** field, and click the **Search** icon (Figure 5–22).

Figure 5–22 The Favorites Search Field and Search Icon



Results display in the **Manage Favorites** window (Figure 5–23).

Figure 5–23 Search Results in the Manage Favorites Window



To exit search results, you must exit the **Manage Favorites** window. Alternatively, you can delete the search term from the **Search** field and click the **Search** icon. A search without a search term returns the **Manage Favorites** window to its default view.

3. Click **Close** to close the **Manage Favorites** window.

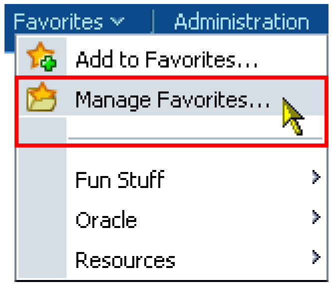
5.4.6 Deleting Favorites and Favorites Folders

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

To delete favorites and favorites folders:

1. Log in, open the **Favorites** menu at the top of the application (Figure 5–24), and select **Manage Favorites**.

Figure 5–24 The Favorites Menu

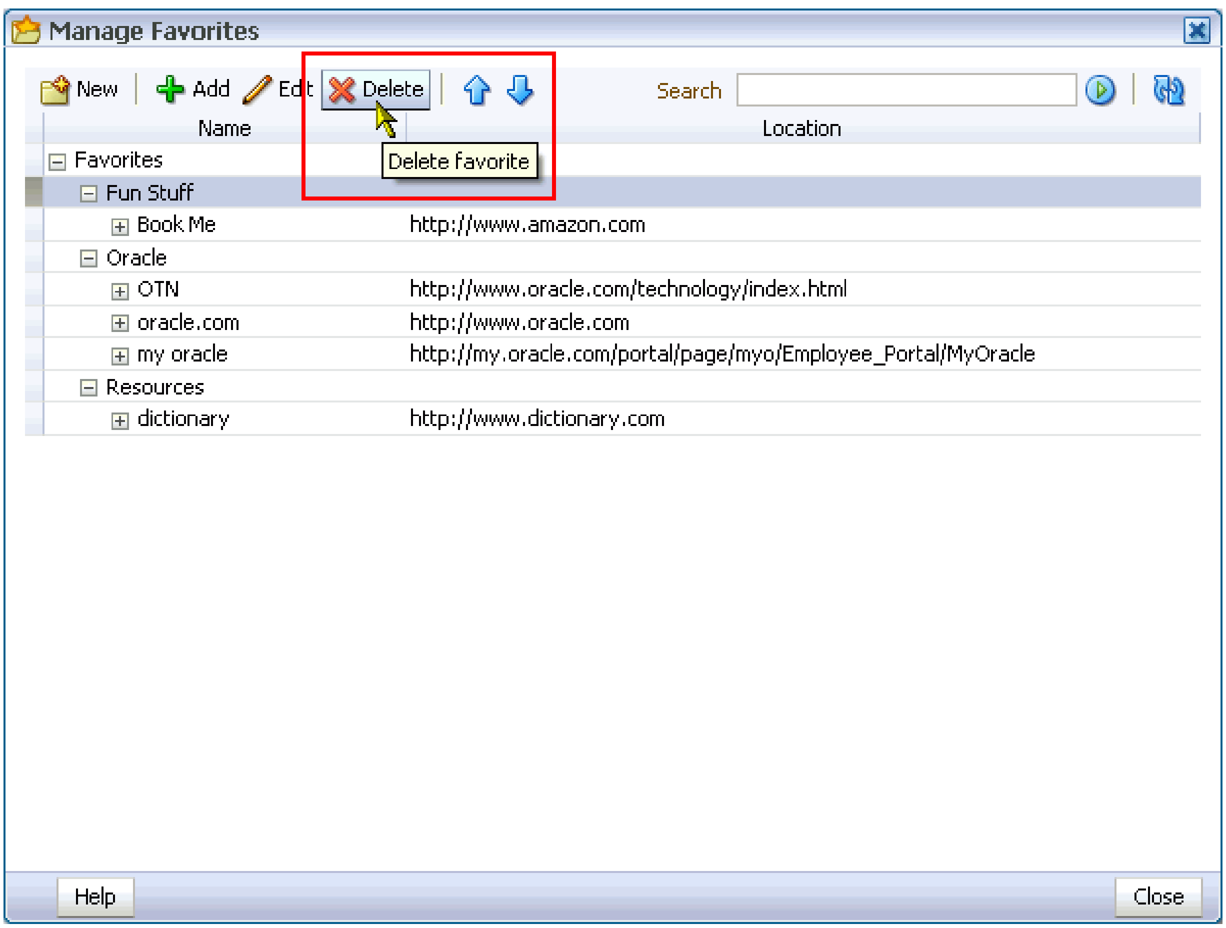


2. In the resulting **Manage Favorites** window, select the favorite or favorite folder you want to delete.

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

3. Click the **Delete** button on the **Manage Favorites** toolbar (Figure 5–25).

Figure 5–25 The Delete Button on the Manage Favorites Toolbar



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

4. Click **Close** to close the **Manage Favorites** window.

Part II

Working with WebCenter Spaces Pages

Part II of this guide provides information about creating, populating, configuring, securing, and deleting pages in WebCenter Spaces. It contains the following chapters:

6 Understanding the Page Service and Oracle Composer

The Page service provides a means of adding, managing, and securing application pages. It works with Oracle Composer, which provides personalization features in page view mode and customization features in page edit mode.

This chapter provides an introduction to the WebCenter Page service and an overview of Oracle Composer. It includes the following sections:

- Section 6.1, "Understanding Pages and Page Management in WebCenter Spaces"
- Section 6.2, "Introducing Oracle Composer"

Audience

This chapter is for users seeking an understanding of the Page service, and Oracle Composer. Much of this information also applies to custom WebCenter applications, though it is written with WebCenter Spaces users in mind. (For information about the Page service in custom WebCenter applications, see the chapter "Enabling the Runtime Creation and Management of Pages" in *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter*.)

6.1 Understanding Pages and Page Management in WebCenter Spaces

Out-of-the-box, WebCenter Spaces provides a variety of page types and page management tools that streamline the creation and management of application pages. This section provides a brief overview of these page types and tools. It includes the following subsections:

- Section 6.1.1, "Understanding WebCenter Spaces Page Types"
- Section 6.1.2, "Introducing the Page Actions Menu"
- Section 6.1.3, "Introducing the Manage Pages Dialog"
- Section 6.1.4, "Introducing Page Styles and Schemes"

6.1.1 Understanding WebCenter Spaces Page Types

All WebCenter Spaces pages start out the same: Log on to WebCenter Spaces, and create a page (for more information, see Chapter 8, "Creating, Editing, and Deleting Pages"). The way you create different page types depends on the page style you select when you create the page or the actions you take after the page is created.

WebCenter Spaces includes the following types of pages:

- **Personal pages**

Personal pages are exposed in your personal space and are viewable only by you and the people to whom you specifically grant access. All of the pages you create while in your personal space are personal pages.

Note: A shared personal page appears by default in the Manage Pages dialog of the users with whom you have shared it. For more information about the Manage Pages dialog, see Chapter 7, "Managing Pages."

Personal pages can combine with other page types. For example, you can have a personal page that exposes a wiki service or a blog.

For information about creating personal pages, see Chapter 8, "Creating, Editing, and Deleting Pages." For information about setting page creation defaults for your personal pages, see Section 7.5, "Setting Page Creation Defaults for Your Personal Pages." For information about sharing personal pages, see Section 7.7, "Setting and Revoking Page Access Permissions."

- **Secured application pages**

  Because the WebCenter Spaces application is secured, secured application pages are simply the pages you create in WebCenter Spaces. For a page not to be secured, that is, for a page to be public, you must override the default page security.

  Like personal pages, secured application pages can combine with other page types. For example, you can have a secured application page that exposes a wiki service or a blog.

  For information about creating a page, see Chapter 8, "Creating, Editing, and Deleting Pages."

- **Public pages**

  Public pages are pages that anyone can access without having to log on to the WebCenter Spaces application. Creating public pages is a simple operation, which can be performed by the application administrator or by you, through custom page access settings. For more information, see the "Setting Up the Public User Experience" section in the *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter* and Section 7.7, "Setting and Revoking Page Access Permissions."

- **Business role pages**

  Your personal space may provide pages targeted to your professional role. These are called *business role pages*. A business role page is a page specifically provided for a given role in your organization. After you create a business role page, it appears by default among the other pages provided in the targeted users' personal spaces.

  For example, an administrator can create business role pages targeted to each line of business. When a sales person logs in and goes to his personal space, he sees the **Sales** business role page. When an engineer logs in and goes to her personal space, she sees the **Engineering** business role page. Information that is timely and relevant to a specific business role can be provided instantly, without the noise of irrelevant information from other lines of business.

  For more information about business role pages, see the "Managing Business Role Pages" section in the *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter*.

- **Wiki pages**

  Wiki pages fully realize the potential of a collaborative environment by their absence of restrictions on content providers and editors. At runtime, all authorized users can create, populate, revise, and delete the same family of wiki pages. Group knowledge can be aggregated, vetted, published, and retained through wikis. Additionally, wiki pages are useful for publication of spontaneous documents that share vital information with a targeted group instantaneously.

  In WebCenter Spaces, wikis are simple to create: create a page using the Wiki style, and then provide wiki connection information—typically a URL to your wiki server.

  For information about creating wiki pages, see Chapter 30, "Working with Wikis and Blogs."

- **Blogs**

  Blog pages provide an opportunity to capture the expertise and lore of your enterprise subject matter experts and evangelists. Blog pages are exposed in WebCenter Spaces in the same way as wiki pages. That is, you create a page using the Blog style, and then you provide the blog connection information.

  For information about creating blogs, see Chapter 30, "Working with Wikis and Blogs."

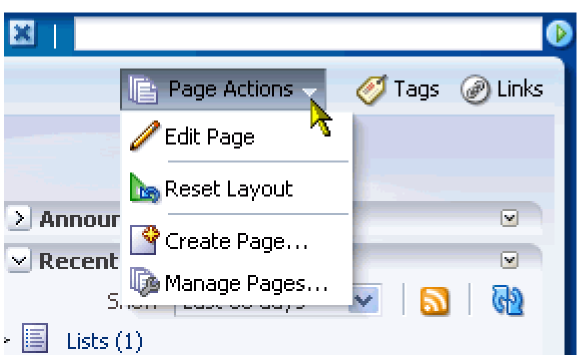
- **Dynamically generated pages**

  Dynamically generated pages are pages that are created on the spot as the result of a user action, such as a search or a mouse-click on a tag. Dynamically generated pages are not stored anywhere; they are created as needed, and when they are closed, they cannot be navigated to and re-opened. They can be regenerated, simply by taking the same action that caused the page to open in the first place. Dynamically generated pages always open as top-level tabs.

6.1.2 Introducing the Page Actions Menu

The **Page Actions** menu provides access to a useful selection of actions you can perform on the current page (Figure 6–1).

Figure 6–1 Page Actions Menu



The options that appear on the menu depend on the level of permission you have on the current page. Table 6–1 lists and describes the full range of options that can appear on a **Page Actions** menu.

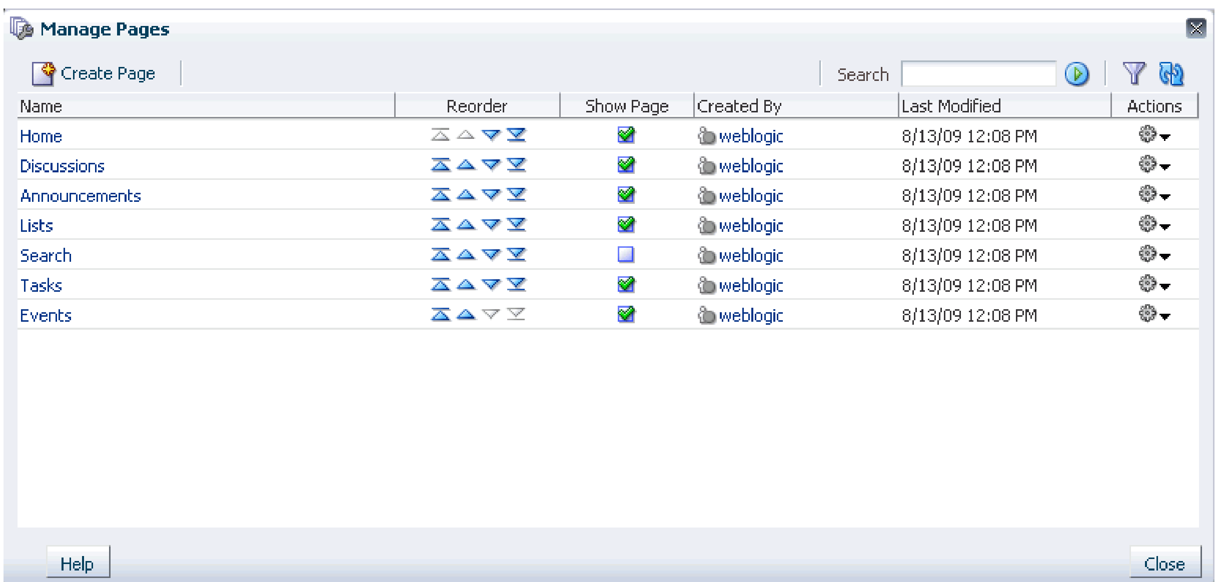
Table 6–1 Options on the Page Actions Menu

Option	Description
Edit Page	Opens the current page in Oracle Composer, the WebCenter Spaces page editor. For information, see Section 6.2, "Introducing Oracle Composer."
Reset Layout	Removes all of the personalizations you have applied to the current page. For information, see Section 4.3, "Removing Your Page Personalizations."
Create Page	Opens the Create Page dialog. For information, see Section 8.1, "Creating Pages."
Manage Pages	Opens the Manage Pages dialog, which you can use to hide, show, rearrange, and perform many other actions on the pages in the current space. For information, see Section 6.1.3, "Introducing the Manage Pages Dialog."

6.1.3 Introducing the Manage Pages Dialog

The Manage Pages dialog provides quick access to page information and enables you to perform a wide range of page-related tasks (Figure 6–2).

Figure 6–2 The Manage Pages Dialog



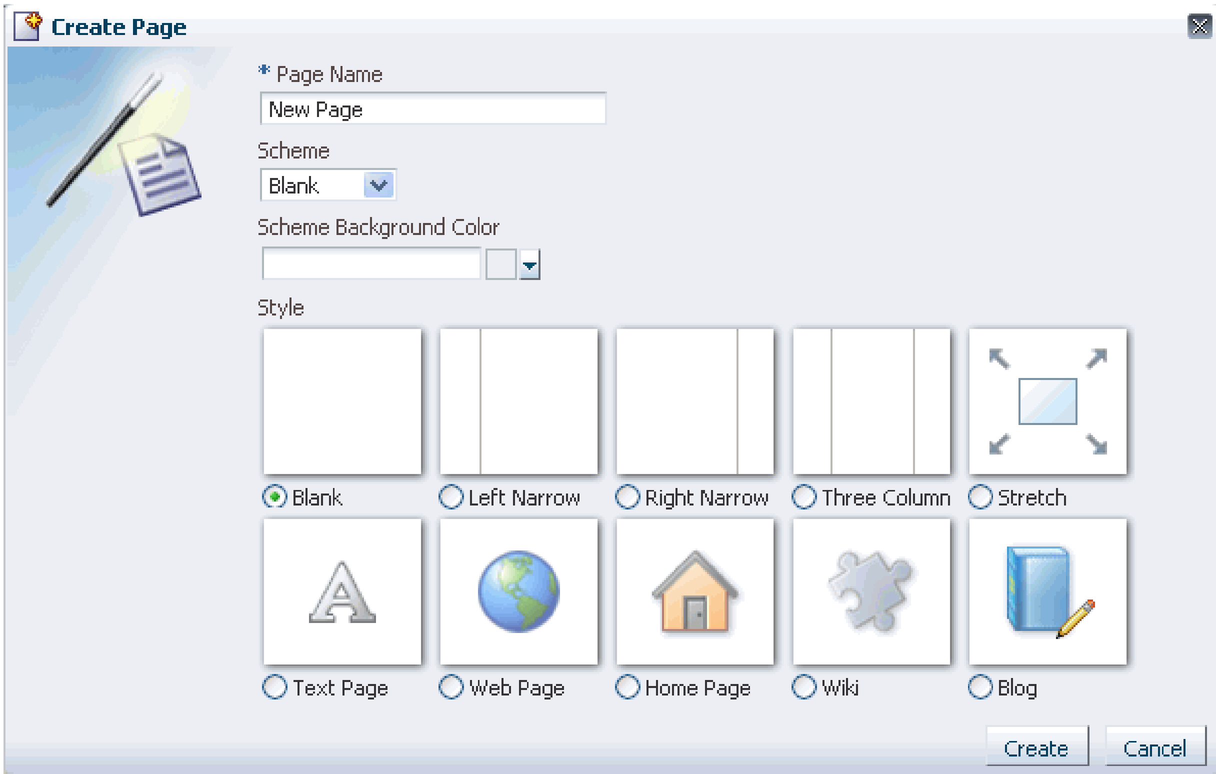
The Manage Pages dialog provides controls for reordering the display of pages and hiding and showing pages within your view of the application. Additionally, it provides a set of **Actions** icons you can click to start the process of editing a page, copying a page, deleting a page, and setting page-level security.

For more information about the Manage Pages dialog, see Chapter 7, "Managing Pages."

6.1.4 Introducing Page Styles and Schemes

Through the **Create Page** dialog (Figure 6–3), WebCenter Spaces provides seeded page styles and schemes to enable rapid creation of stylish application pages.

Figure 6–3 The Page Style Selection in the Create Page Dialog



Page styles describe the positioning of content layout areas and the content flow. Out-of-the-box page styles include a style for text-heavy pages, and a style for exposing web content, styles for exposing wikis and blogs. Another style is provided to give you a jump start on your personal and group space home pages.

Page schemes define the color and image that render in the page background. If you want to promote company branding or you have your own ideas about a page's look and feel, you can ignore out-of-the-box schemes and provide your own.

For more information about page styles and schemes, see Chapter 8, "Creating, Editing, and Deleting Pages."

6.2 Introducing Oracle Composer

One of the most powerful offerings in WebCenter Spaces is the ability to add and edit page content at application runtime. This capability is delivered through Oracle Composer, a fully-integrated page editor for revising the layout and content of application pages.

Use Oracle Composer to change a page layout and to add task flows, portlets, documents, layout components, and other objects to a page. You can also use Oracle Composer to provide values for the properties associated with pages and the objects they contain and to wire pages, task flows, and portlets to each other.

This section provides an overview of Oracle Composer. It contains the following subsections:

- Section 6.2.1, "Accessing Oracle Composer"
- Section 6.2.2, "Introducing Design View and Source View"

- Section 6.2.3, "Introducing the Oracle Composer Catalog"
- Section 6.2.4, "Introducing the Component Properties Dialog"
- Section 6.2.5, "Introducing the Page Properties Dialog"
- Section 6.2.6, "Introducing the Reset Page Button"

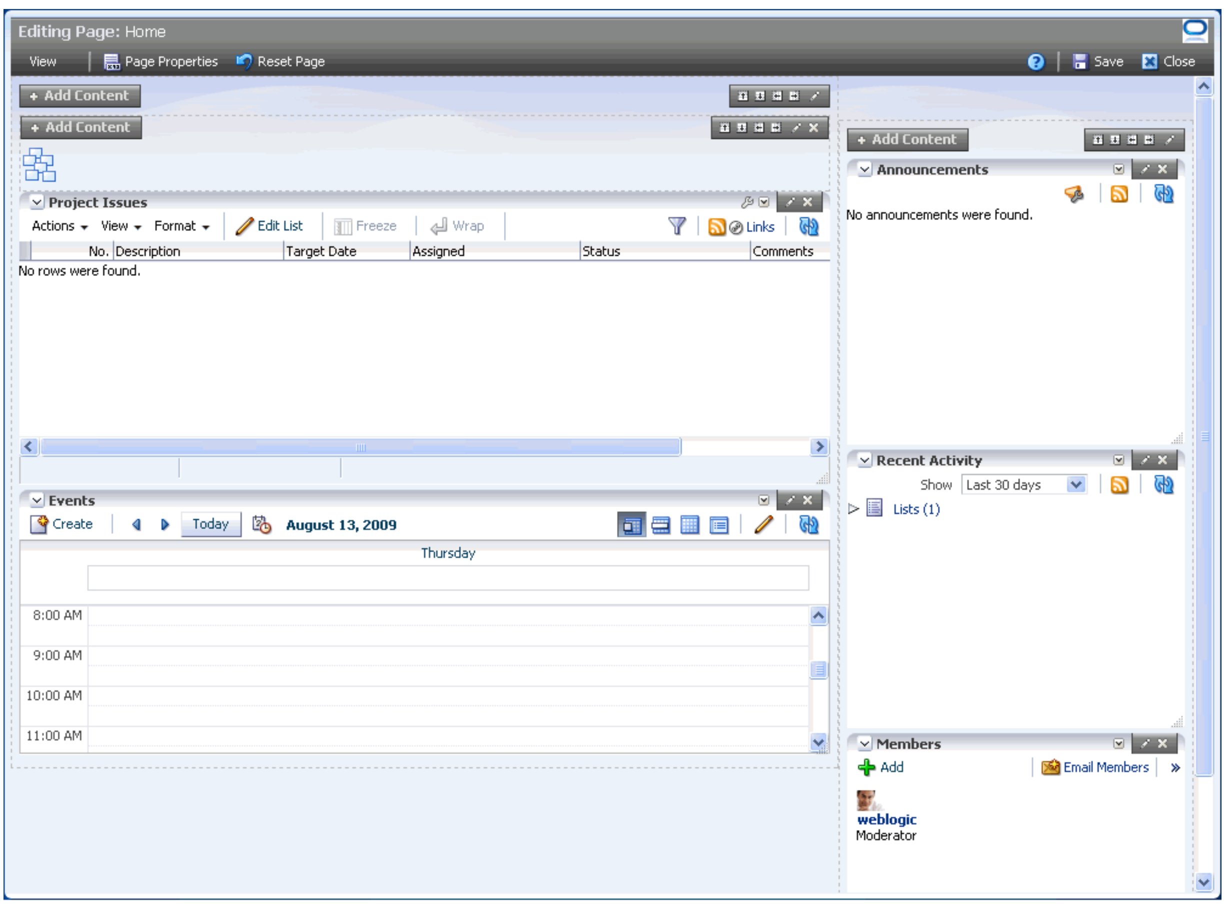
6.2.1 Accessing Oracle Composer

WebCenter applications provide many ways to enter Oracle Composer:

- When you first create a page (for more information, see Section 8.1, "Creating Pages")
- When you select **Edit Page** from the **Page Actions** menu (for more information, see Section 8.2.1, "Entering and Exiting Page Edit Mode")
- When you select the **Edit Page** option from the **Actions** menu in the Manage Pages dialog (for more information, see Section 7.9, "Entering Edit Mode Through the Manage Pages Dialog")

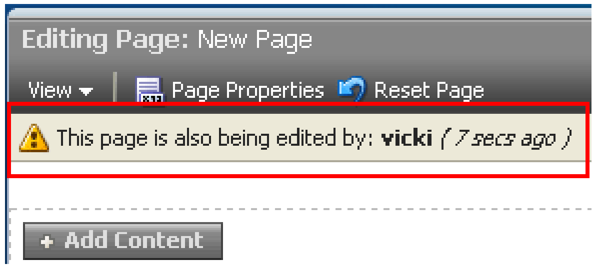
In page edit mode, page-related controls appear across the top of the page, boundaries for content regions are indicated by dashed lines, an **Add Content** button appears on each content region, and an **Edit** icon appears on each component (Figure 6–4).

Figure 6–4 A Page Opened in Design View in Oracle Composer



Because users access WebCenter applications from the Web, multiple users may attempt to edit the same page at the same time. In such cases, a concurrency warning appears in Oracle Composer that alerts each user to the others (Figure 6–5).

Figure 6–5 A Concurrency Warning in Oracle Composer



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

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

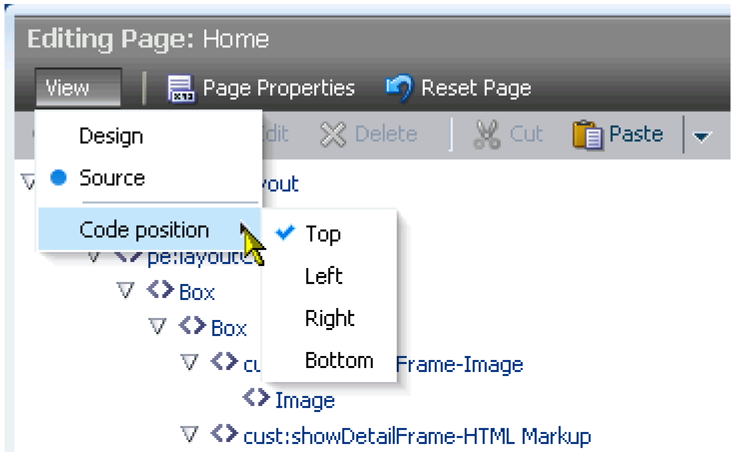
Because concurrent page editing is supported, there may be occasions when one user deletes a page that another user is editing. In such cases, the user performing the edits sees an error message with each action. For example, a message saying the user does not have permission to edit the page may appear.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

> **Note:** WebCenter applications do not support single-user concurrency. That is, one user cannot log in to the same WebCenter application at the same time more than once.
>
> When you revise a component in page view mode while another user deletes the same component in page edit mode, a WebCenter error page opens. Simply navigate back to the original page. The deleted component does not appear, and you can continue working on other components.

6.2.2 Introducing Design View and Source View

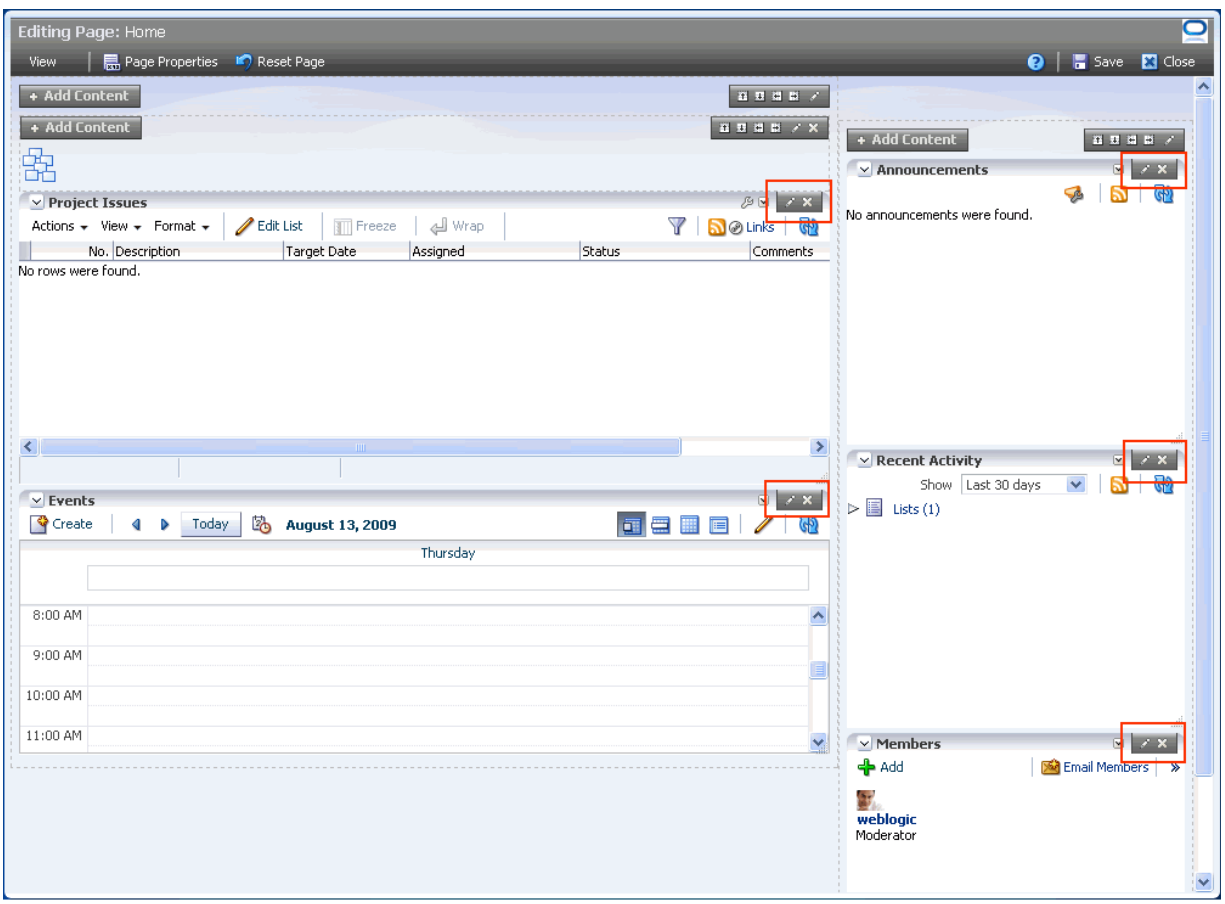
Oracle Composer provides two views for working with page content: Design view and Source view. To open either of these views, enter Oracle Composer, and select **Source** or **Design** from the **View** menu (Figure 6–6).

Figure 6–6 View Menu in Oracle Composer



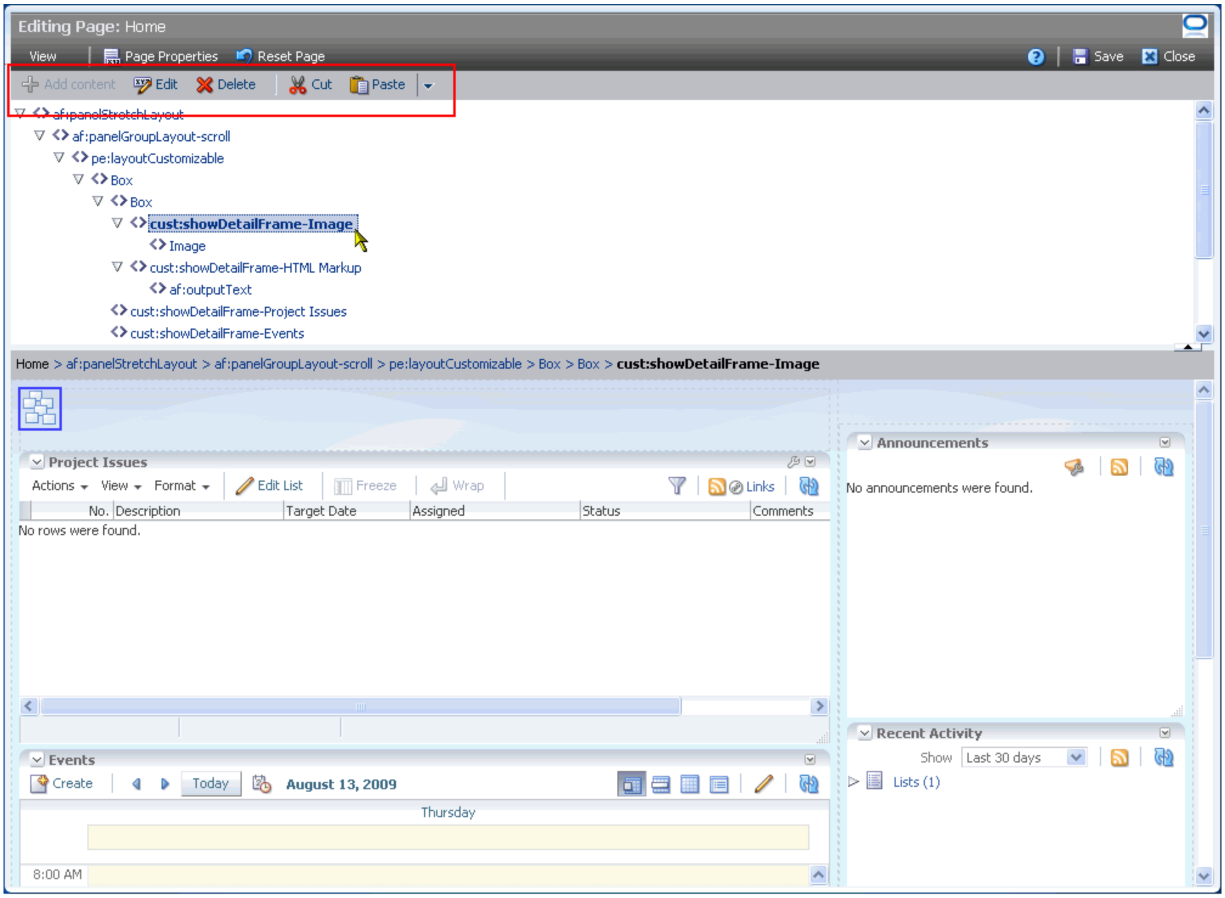
Design view provides a WYSIWYG rendering of the page and its content, where Edit and Delete controls are directly selectable on each component (Figure 6–7).

Figure 6–7 Edit and Delete Controls on Page Components in Design View in Oracle Composer



Source view provides a combined WYSIWYG and hierarchical rendering of page components, where Edit, Delete, and Refresh controls are available on the header of the hierarchical list (Figure 6–8).

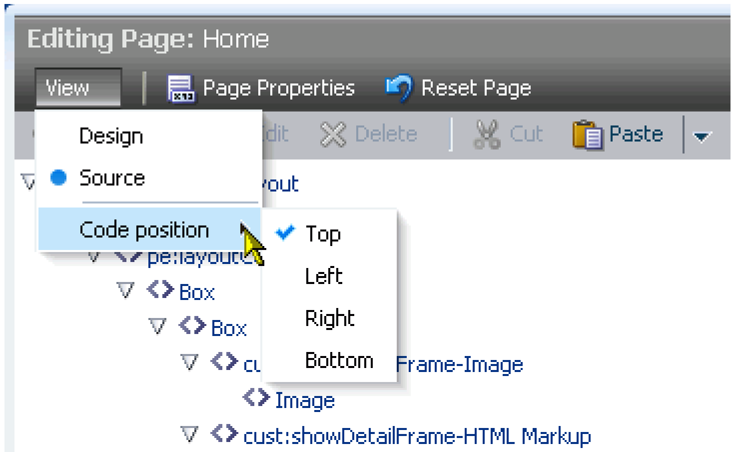
Figure 6–8 A Page Opened in Source View in Oracle Composer



Note: No component actions, such as the **Actions** menu, the **Collapse** icon, or the **Resize** icon, are active when the page editor is set to Source view.

The **Code position** option on the **View** menu becomes active when the page is open in Source view (Figure 6–9).

Figure 6–9 View Menu in Oracle Composer

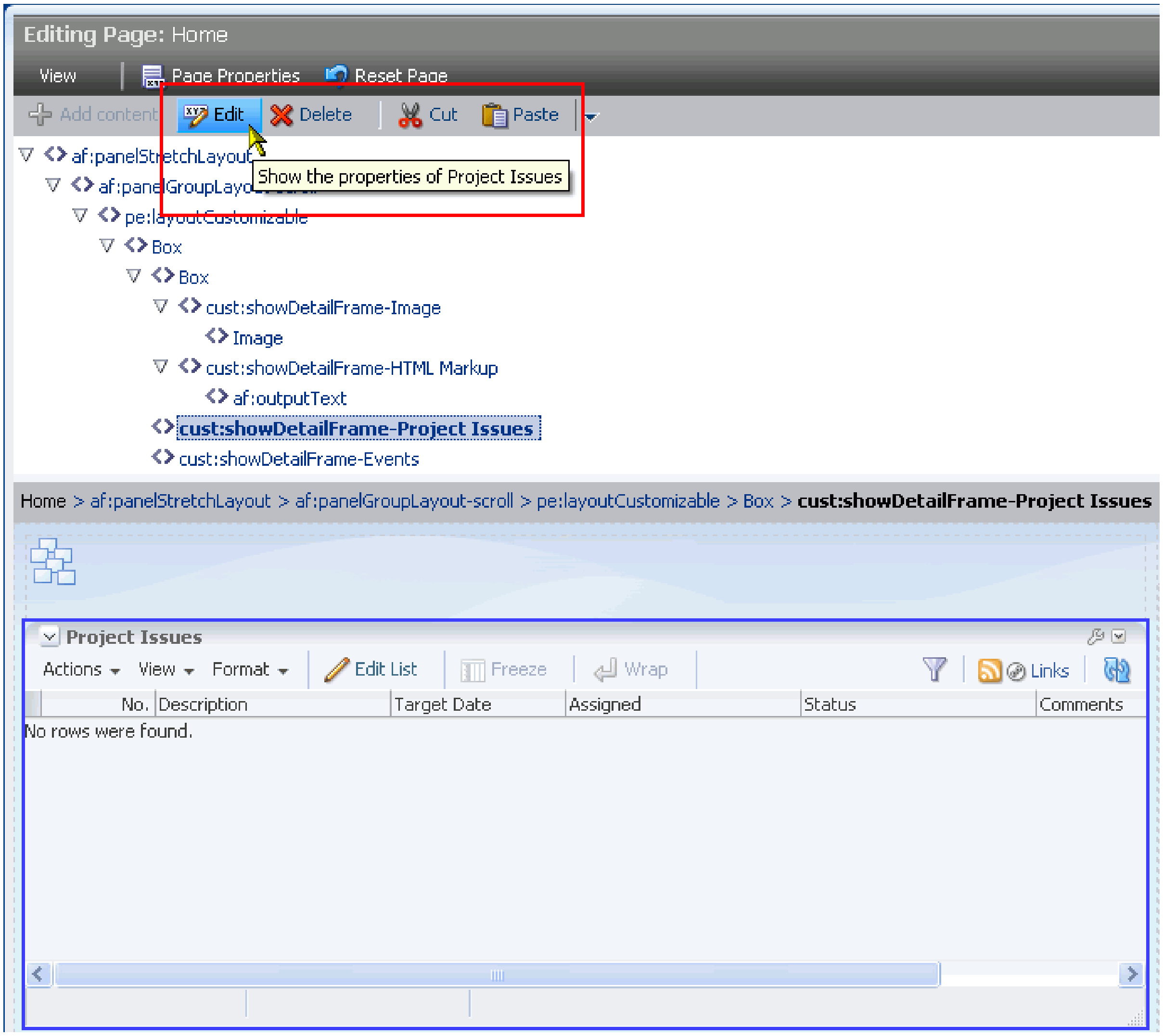


Use the selections under **Code position** to specify whether the page source code is presented on the top, bottom, left, or right of the WYSIWYG portion of the page.

Source view additionally provides access to page layout components that are otherwise not exposed on the page. Source view enables the selection and configuration of such components. Select a component on the hierarchical list, and it is automatically selected on the page. For more information, see Section 9.1.8, "Hidden Layout Components."

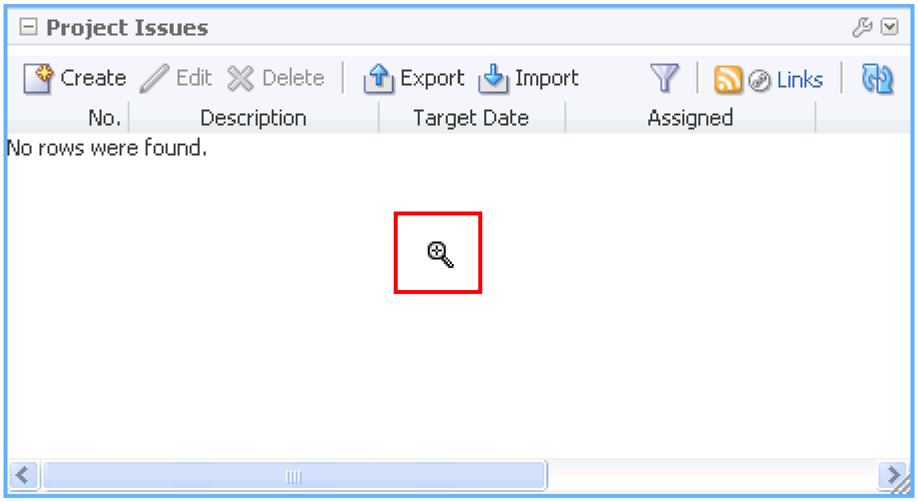
Component selection is indicated by a dark blue outline. Access the selected component's properties by clicking the **Show the properties of *component name*** icon on the Source view header (Figure 6–10).

Figure 6–10 Show the properties of [component name] Icon in Source View



You can also select components in Source view by clicking them directly on the page. In Source view, your mouse cursor changes to a magnifying glass when you move it over selectable a component (Figure 6–11).

Figure 6–11 Selection Cursor in Source View

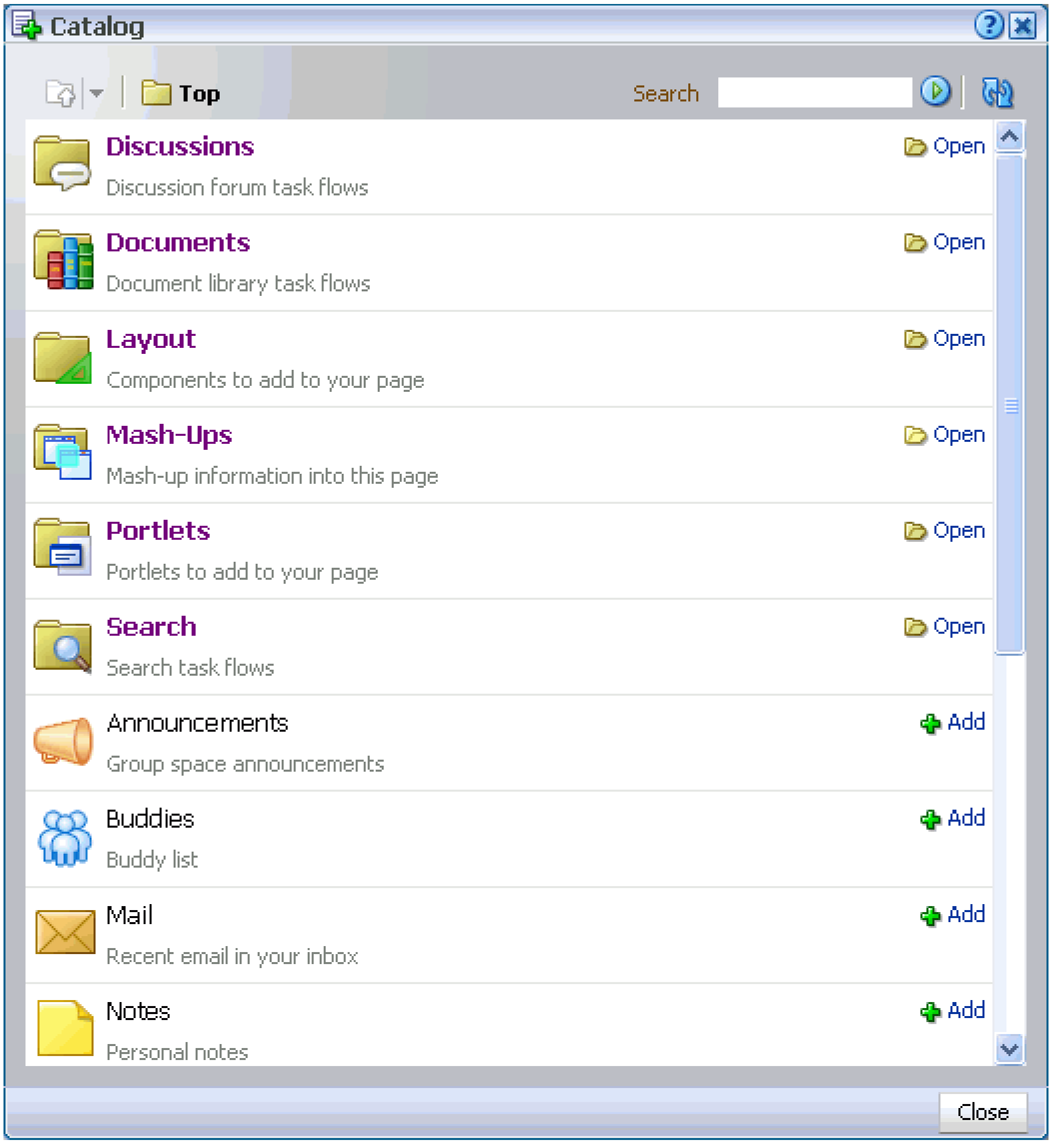


Note: If you use the Reset Page feature while in Source view, the selection cursor goes away. To get it back, simply click a component on the hierarchical list of components.

6.2.3 Introducing the Oracle Composer Catalog

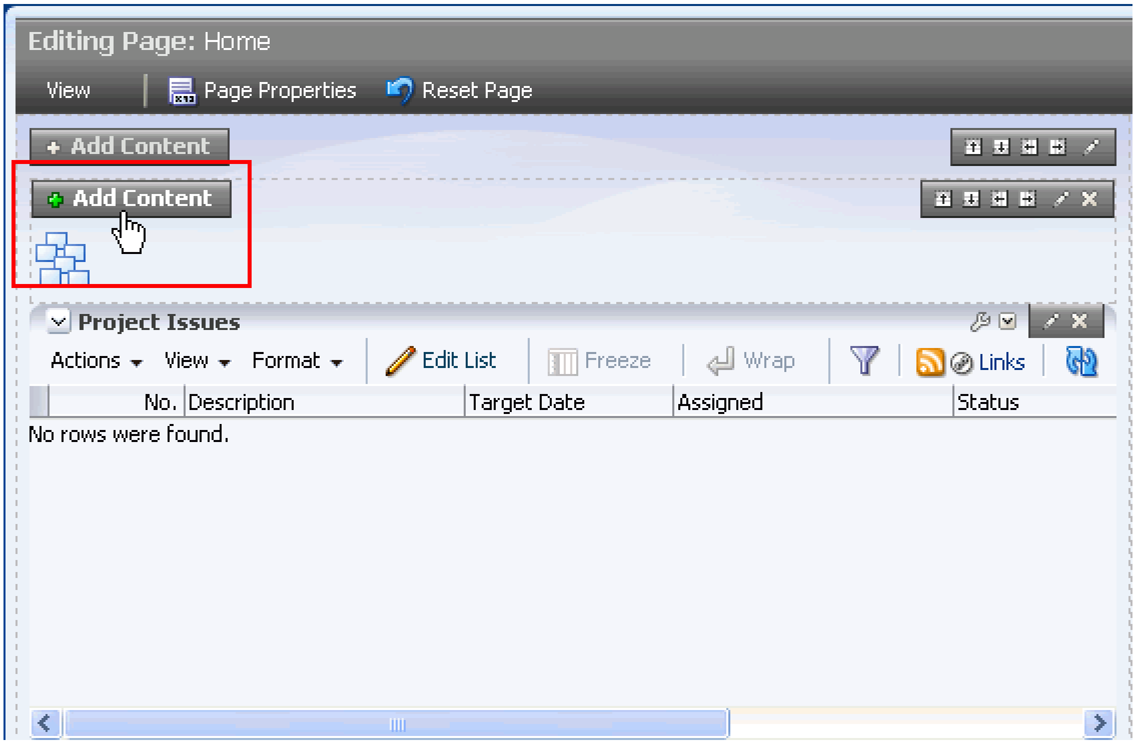
Users with page edit privileges have access to the Oracle Composer Catalog, a gateway to a wide range of task flows, portlets, and layout components (Figure 6–12).

Figure 6–12 The Oracle Composer Catalog



Open the Catalog by clicking the **Add Content** button in the region where you want to add content (Figure 6–13).

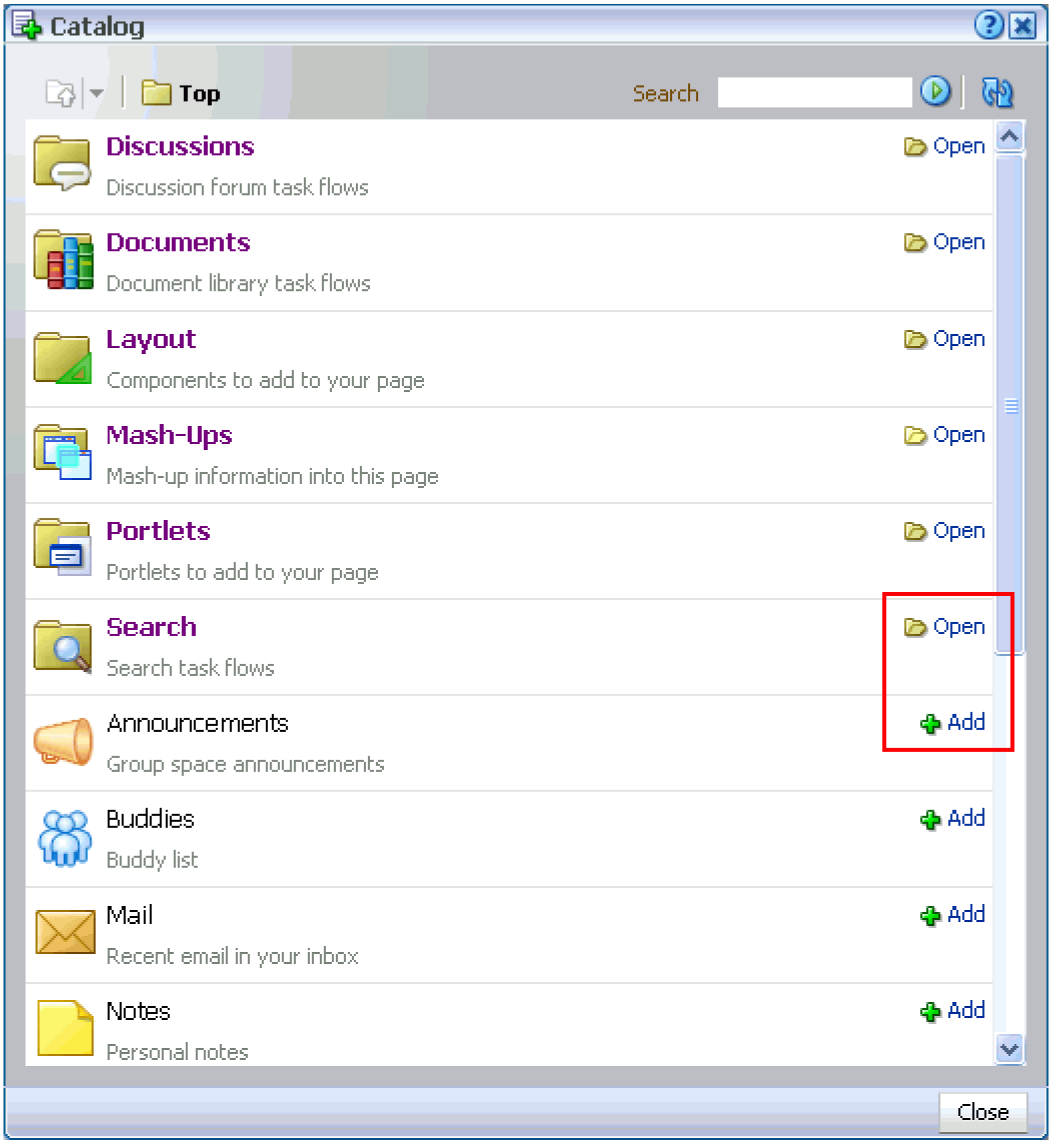
Figure 6–13 Add Content Button on a Layout Region



The Catalog contains all the resources your application administrator has made available through connection configurations with back-end servers.

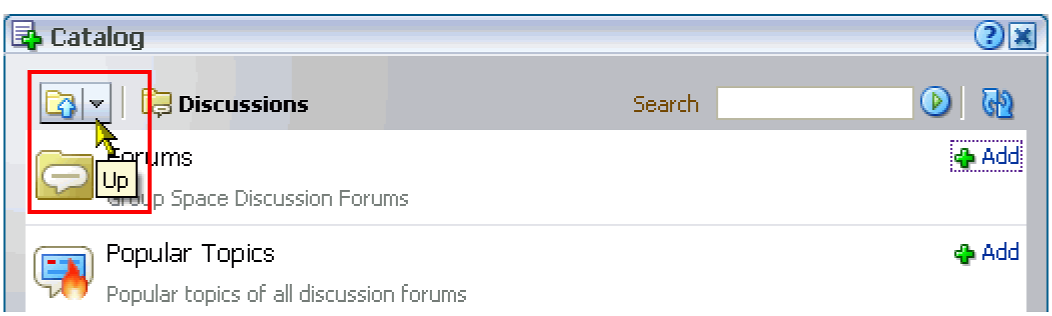
The Catalog is organized into components and folders. Some components are readily available at the top-level of the Catalog. Other components are organized into folders and subfolders, which you can drill into. You can distinguish between the two by noting whether a listing has an **Open** or **Add** link next to it (Figure 6–14).

Figure 6–14 A Top-Level Component Folder (Open) and Component (Add)



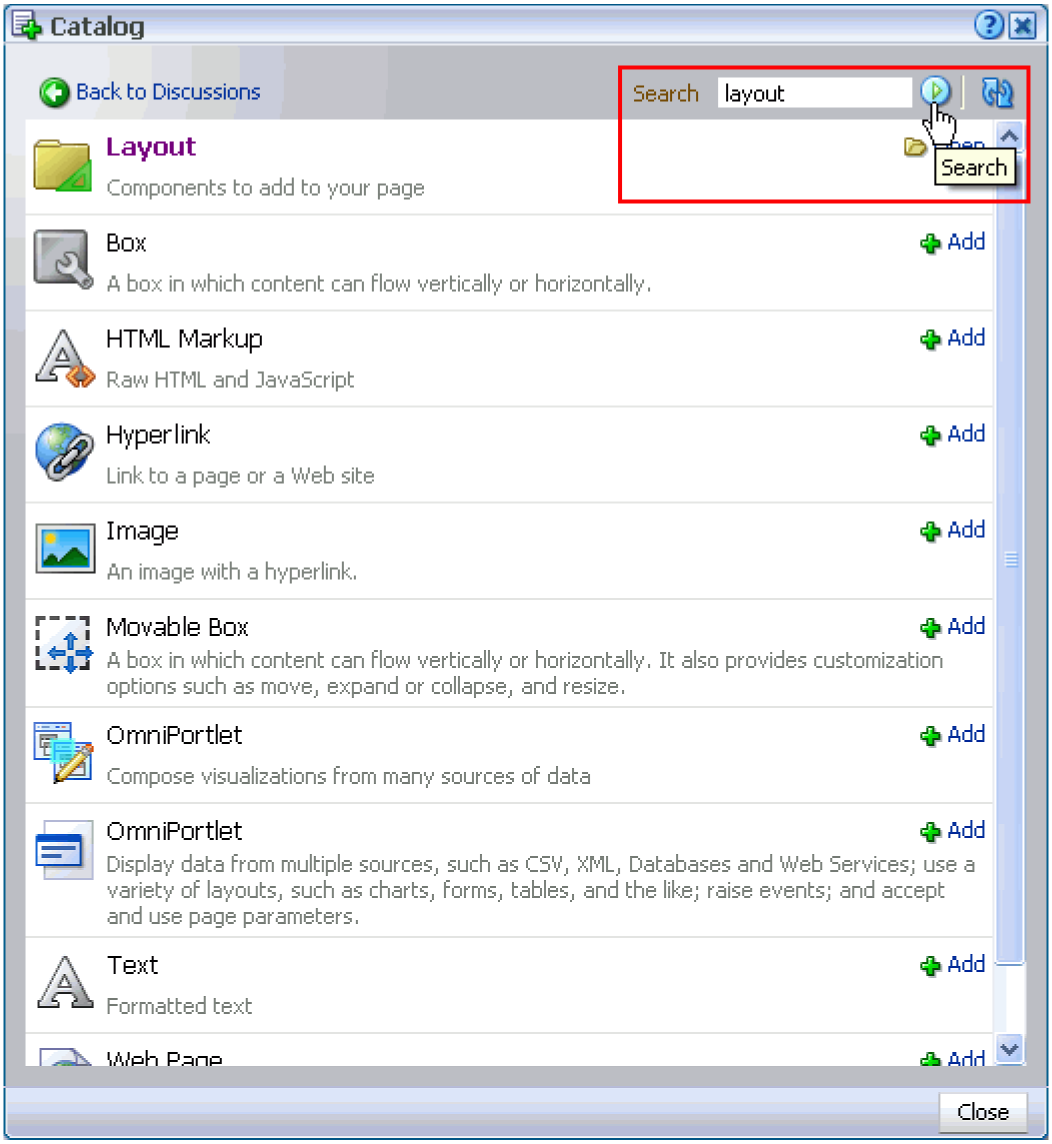
Navigate the Catalog folder hierarchy using the **Up** icon (Figure 6–15).

Figure 6–15 Up Icon on the Catalog



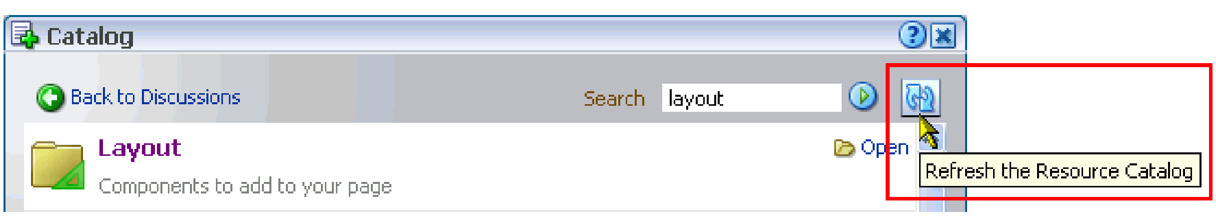
Use the search feature to locate components by name or description (Figure 6–16).

Figure 6–16 Search Field and Button on the Catalog



Use the **Refresh the Resource Catalog** icon to update the catalog with newly added components (Figure 6–17).

Figure 6–17 Refresh the Resource Catalog Icon on the Catalog



See Also: For information about adding content to a page, see Chapter 10, "Working with Page Content."

Your application administrator determines which resources are offered through the Catalog. Table 6–2 lists and describes the types of resources that may appear in your Catalog view and indicates whether the resource is available in personal spaces, group spaces, or both.

Table 6–2 Oracle Composer Catalog Resources

Resource	Description	Group/Personal
Activity Stream	A People Connections service task flow for viewing the activities of your connections. For more information, see Chapter 25, "Working with the People Connections Service."	Group
Announcements	Task flows for viewing and entering announcements targeted to all members of a given group space. For more information, see Chapter 16, "Working with the Announcements Service."	Both
Buddies	An Instant Messaging and Presence service task flow for displaying a list of your instant message contacts. For more information, see Chapter 20, "Working with the Instant Messaging and Presence Service (IMP)."	Personal
Discussions	Task flows for viewing, participating in, and managing group space discussion forums. For more information, see Chapter 17, "Working with the Discussions Service."	Both
Documents	Task flows for viewing, adding, and managing files in a given space. For more information, see Chapter 18, "Working with the Documents Service."	Both
Events	Task flows for viewing and scheduling meetings, appointments, and other types of events. For more information, see Chapter 19, "Working with the Events Service."	Both
Group Spaces	A task flow for browsing, searching, and accessing the group spaces that are available to you, for example, public group spaces or the group spaces of which you are a member. This task flow provides the same type of access you find when you view **My Group Spaces**. For more information, see Section 12.2, "Viewing Available Group Spaces."	Personal
Layout	Page layout components, including a rich text editor, content boxes, images, and the like. For more information, see Chapter 9, "Working with Page Layout Components."	Both
Lists	Task flows for creating, viewing, and managing lists in a group space. For more information, see Chapter 22, "Working with the Lists Service."	Group
Mash-Ups	Portlets that support contextual wiring. For more information, see Chapter 11, "Wiring Pages, Task Flows, Portlets, and UI Components."	Both
Mail	A task flow for accessing the most recent messages in your in box. For more information, see Chapter 23, "Working with the Mail Service."	Personal

Table 6–2 (Cont.) Oracle Composer Catalog Resources

Resource	Description	Group/Personal
Members	A task flow for displaying all of the members of a given group space. For more information, see Section 15.4, "Working with the Members Task Flow."	Group
Notes	A task flow for writing reminder notes to yourself. For more information, see Chapter 24, "Working with the Notes Service."	Personal
People Connections	Task flows for social networking, including task flows for creating personal connections, viewing connections' activities, and viewing and posting messages and feedback. For more information, see Chapter 25, "Working with the People Connections Service."	Personal
Personal	Task flows for introducing individual-focussed features into a group space context. Out-of-the-box, this folder contains task flows from the People Connections, Instant Messaging and Presence, Mail, Notes, Tags, and Worklist services and the Group Spaces task flow.	Group
Portlets	Portlets for adding functionality to your pages. Out-of-the-box, this folder contains the Omniportlet, Web Clipping, and Parameter Form and Report portlets. For more information, see Part VI, "Working with Portlets".	Both
Recent Activity	A task flow for viewing the recent activity taking place in a given group space. For more information, see Chapter 27, "Working with the Recent Activities Service."	Both
RSS	An RSS reader that you can use to view news feeds from other Web sources. For more information, see Chapter 26, "Working with the RSS Service."	Both
Search	Task flows for running searches and saving and managing saved searches. For more information, see Chapter 28, "Working with the Search Service."	Both
Similarly Tagged Items	A task flow for viewing items with at least one tag in common with the tags used on the current page. For more information, see Chapter 29, "Working with the Tags Service."	Both
Tags	A task flow for viewing the tags you have used and the items you have tagged. For more information, see Chapter 29, "Working with the Tags Service."	Personal
Worklist	A task flow for viewing notifications from applications that subscribe to an enterprise workflow process. For more information, see Chapter 31, "Working with the Worklist Service."	Personal

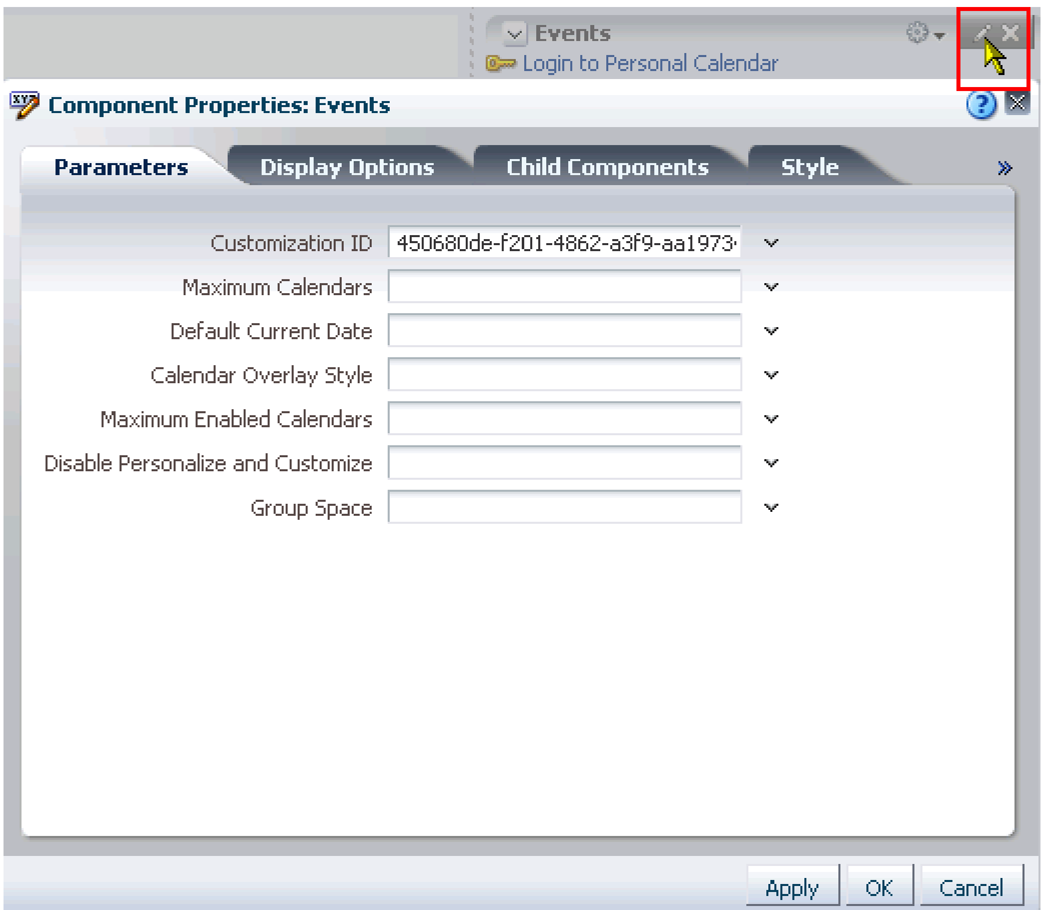
> **See Also:** Advanced users can extend WebCenter Spaces by customizing the Catalog. For more information, see the white paper, "*Extending WebCenter Spaces (11.1.1.2.0)*," on the Oracle Technology Network:
> `http://www.oracle.com/technology/products/webcenter/white_papers.html`.

6.2.4 Introducing the Component Properties Dialog

Page components, such as task flows, portlets, and layout components, have associated properties that enable you to control component content, behavior, and look and feel. You can access these properties in Oracle Composer through the Component Properties dialog.

To open the dialog, click the **Edit** icon on the component of interest when the page is open in Oracle Composer (Figure 6–18).

Figure 6–18 Edit Icon on an Events Task Flow and the Resulting Component Properties Dialog



Component properties can appear on up to five tabs:

- **Parameters**—Displays properties related to component content, such as the source and scope of content, and a range of time within which content was created or modified. For more information, see Section 10.4.3, "Working with Component Parameters."

- **Display Options**—Displays properties related to component chrome, such as the component header, an **Actions** menu, **Minimize** icon, **Resize** icon, and the like. For more information, see Section 10.4.4, "Working with Component Display Options."
- **Child Components**—Displays a component's child components, for example, the task flows and portlets in a Box layout component. Provides controls for rearranging, hiding, and showing the children. For more information, see Section 10.4.6, "Working with Child Components."
- **Style**—Displays properties related to the look and feel of the entire component, including its chrome and its content. For more information, see Section 10.4.7, "Working with Style and Content Style Properties."
- **Content Style**—Displays properties related to the look and feel of component content exclusively. For more information, see Section 10.4.7, "Working with Style and Content Style Properties."
- **Events**—Displays events and event handlers associated with the component. These are useful in page and component wiring. For more information about page and component wiring, see Chapter 11, "Wiring Pages, Task Flows, Portlets, and UI Components."

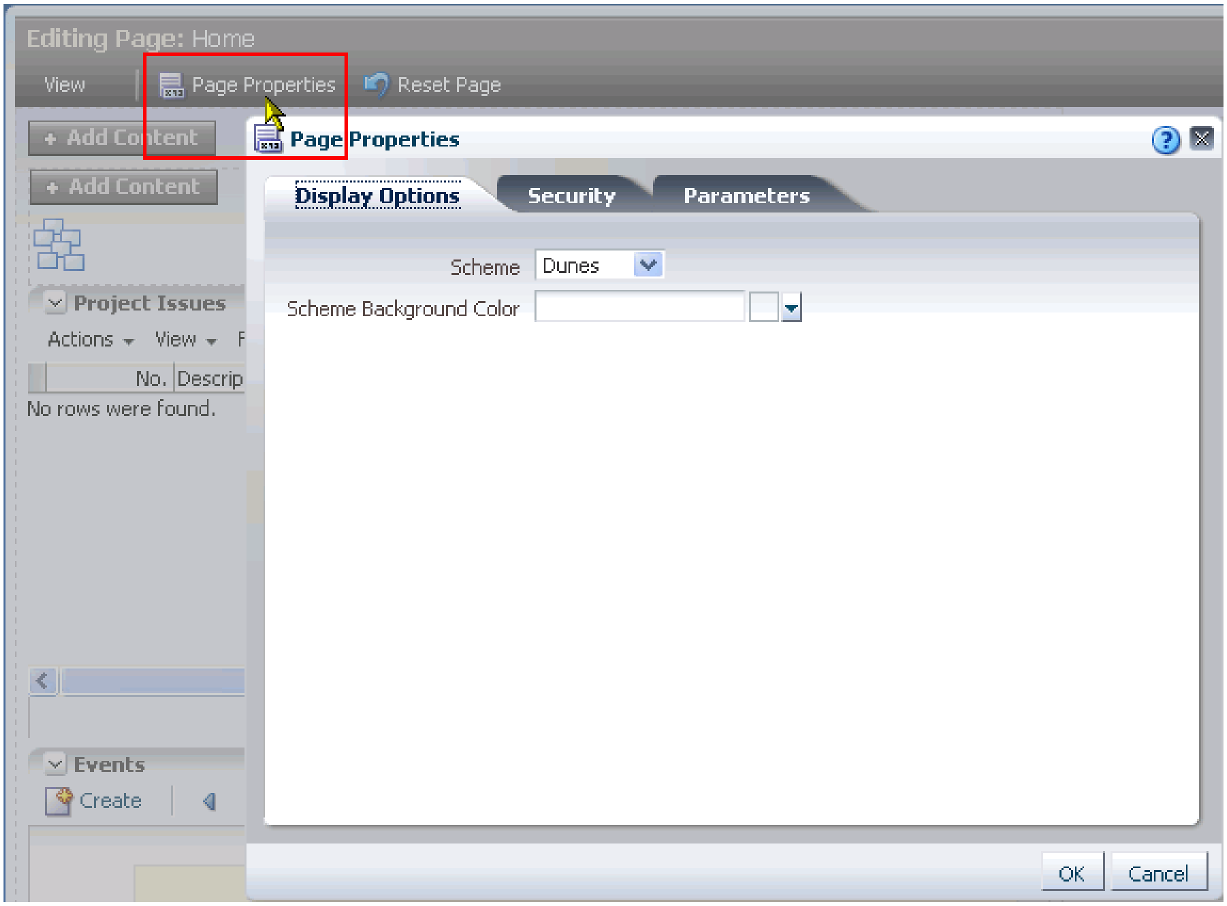
Not all components display all tabs. Tabs appear according to the built-in capabilities of the particular component.

> **See Also:** Working with component properties is discussed throughout this guide.
>
> - For information about working with layout component properties, see Section 9.3, "Working with Layout Component Properties."
> - For information about working with task flow properties, see the chapters devoted to a particular service.
> - For information about working with portlet properties, see the chapters devoted to a particular portlet.

6.2.5 Introducing the Page Properties Dialog

In Oracle Composer, the Page Properties dialog provides a means of revising the page scheme and background color, configuring page security, and creating page parameters to use in wiring pages and components to each other (Figure 6–19).

Figure 6–19 Page Properties Button and the Page Properties Dialog



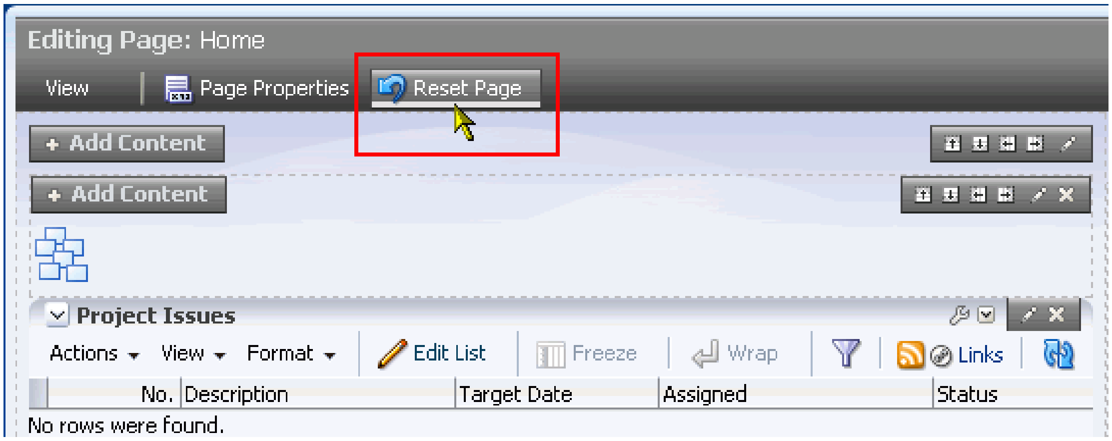
See Also: Page properties are discussed in different sections of this guide:

- For information about setting page display options, see Section 8.4.2, "Changing the Page Scheme and Scheme Background Color."
- For information about configuring page security, see Section 8.3, "Setting Page Access."
- For information about creating page parameters, see Section 11.3.1, "Creating Page Parameters."

6.2.6 Introducing the Reset Page Button

A **Reset Page** button is available for returning a page to its original state (Figure 6–20).

Figure 6–20 Reset Page Button in Oracle Composer



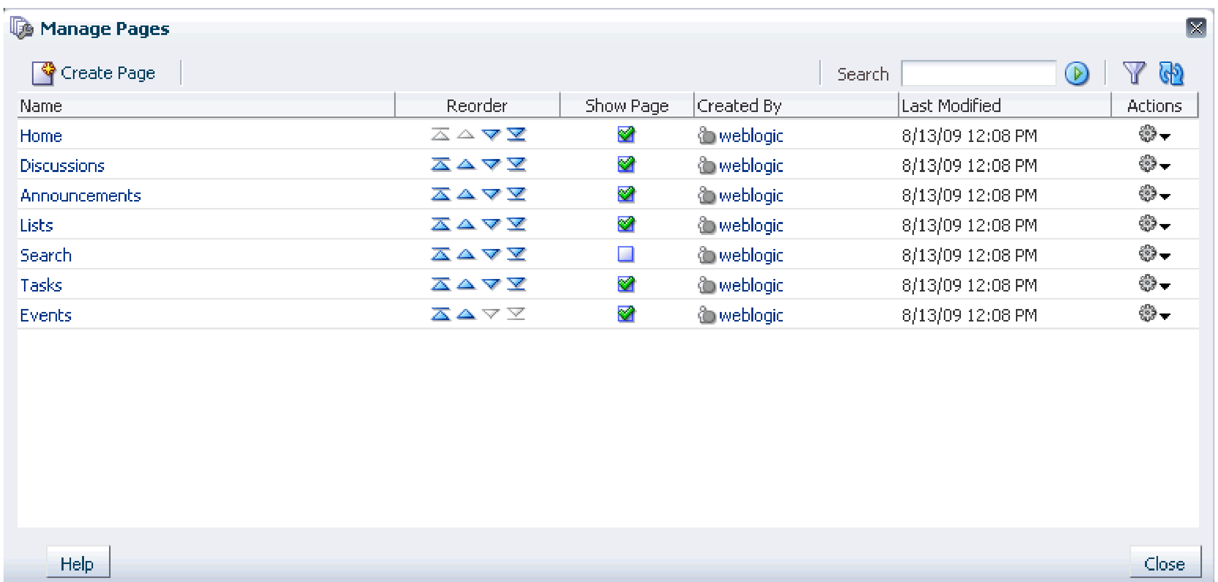
Use the **Reset Page** button to remove all personalizations, customizations—all changes of any kind—from the page, returning it to the state it was in when first created. This is particularly valuable for maintaining user links to pages that you are renovating. Resetting a page enables you to take the page back to its original state without disrupting such connections.

> **See Also:** For information about resetting a page, see Section 8.2.2, "Removing All Edits, Personalizations, and Customizations from a Page."

7 Managing Pages

The WebCenter Spaces Manage Pages dialog (Figure 7–1) provides easy access to a wide variety of page-related actions. For example, use the dialog to personalize the display order of personal or group space pages; set page creation defaults (personal space pages only); apply page security; hide or show pages in your application view; and create, copy, and delete pages.

Figure 7–1 The Manage Pages Dialog



This chapter includes the following sections:

- Section 7.1, "What You Should Know About the Manage Pages Dialog"
- Section 7.2, "Opening the Manage Pages Dialog"
- Section 7.3, "Finding Pages in the Manage Pages Dialog"
- Section 7.4, "Changing the Order of Pages Through the Manage Pages Dialog"
- Section 7.5, "Setting Page Creation Defaults for Your Personal Pages"
- Section 7.6, "Creating a Page Through the Manage Pages Dialog"
- Section 7.7, "Setting and Revoking Page Access Permissions"
- Section 7.8, "Copying a Page Through the Manage Pages Dialog"

- Section 7.9, "Entering Edit Mode Through the Manage Pages Dialog"
- Section 7.10, "Deleting a Page Through the Manage Pages Dialog"

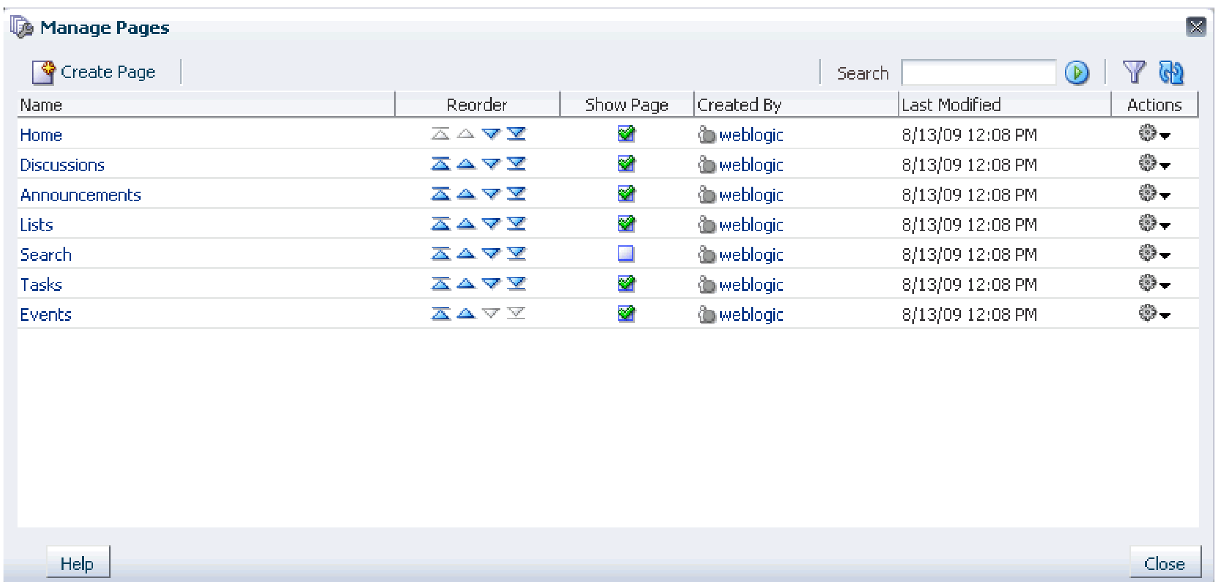
Audience

This chapter is intended for WebCenter Spaces users who intend to manage application pages. By default, every authenticated user can perform the actions described in this chapter on the pages they create in their own personal spaces. Note, however that your application administrator may alter default page access permissions. In group spaces, users must have sufficient access privileges on the group space to manage its pages.

7.1 What You Should Know About the Manage Pages Dialog

The Manage Pages dialog (Figure 7–2) provides quick access to pages and page-management controls.

Figure 7–2 The Manage Pages Dialog

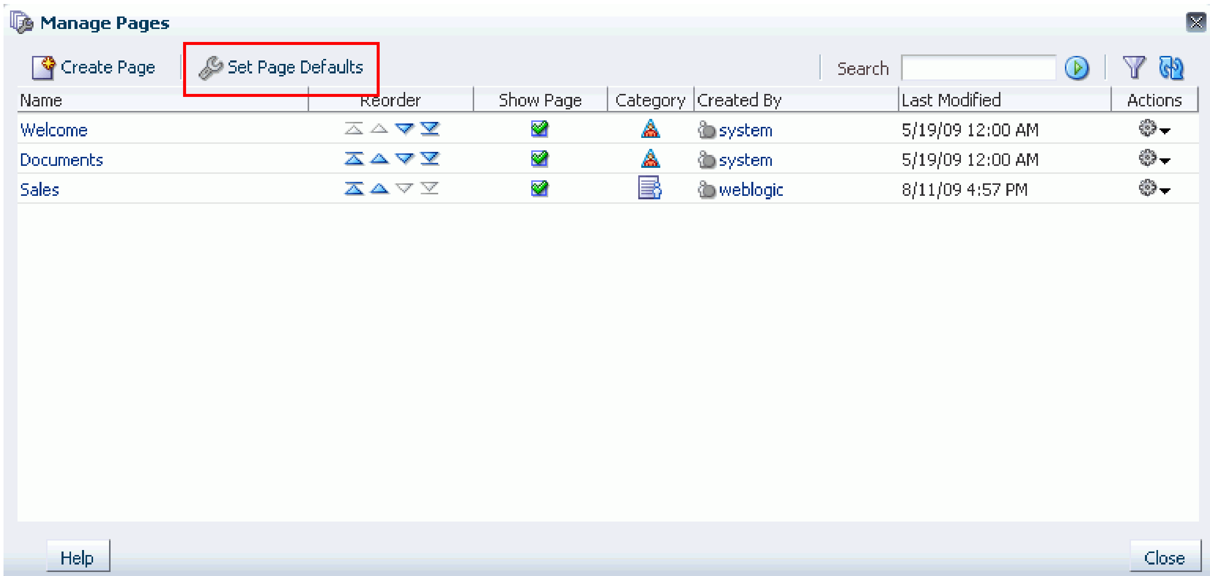


These include:

- Creating, editing, copying, and deleting pages
- Hiding and showing pages in your view
- Exposing a group space page in your personal space
- Sending a page link through your native mail application
- Rearranging your view of page display order
- Setting page security (including making a page public)
- Setting page creation defaults (personal space pages only)
- Viewing information about a page, including its direct URL

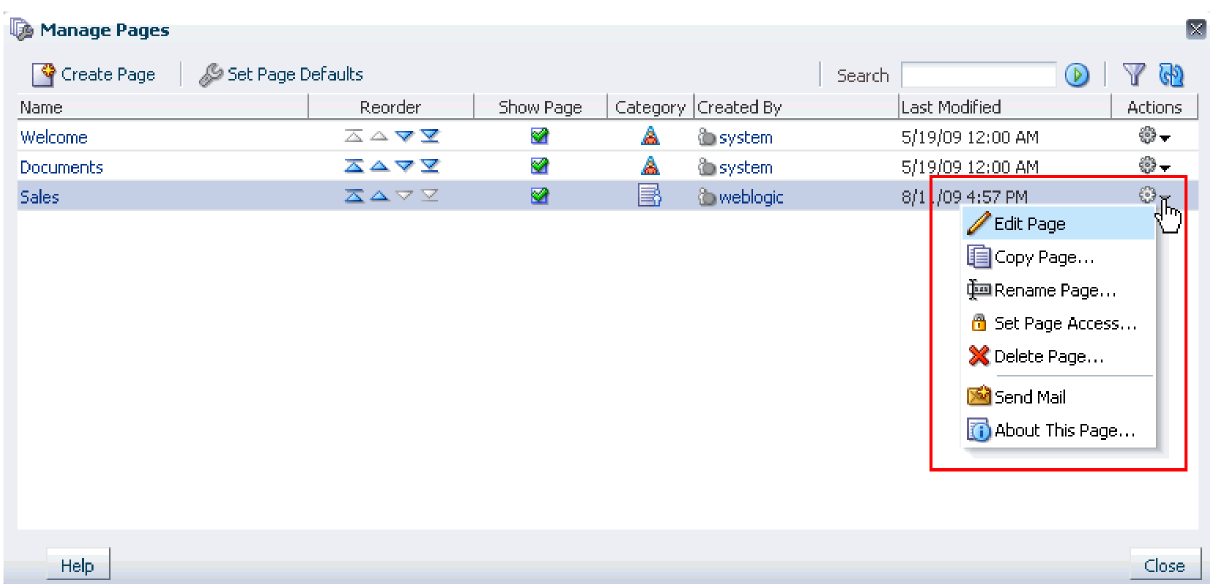
The Manage Pages dialog is context-aware. When you open it, the dialog renders according to your location in the application. For example, in a group space, the Manage Pages dialog displays all of the pages in that group space. In your personal space, it displays all of the pages in your personal space; additionally, it provides a control for setting page creation defaults for the pages you create in your personal space (Figure 7–3).

Figure 7–3 The Set Page Defaults Button in the Manage Pages Dialog



The Manage Pages dialog provides access to the actions you can perform on a given page in its **Actions** column (Figure 7–4).

Figure 7–4 The Actions Column and Menu in the Manage Pages Dialog



> **Tip:** Actions performed from the Manage Pages dialog take effect when you close the dialog.

The actions that appear on the **Actions** menu depend upon the page, the point from which the page is opened, and your permissions on the page.

Note: Most of the actions available on the **Actions** menu are also available on the pages themselves. An active page—that is, the page currently on view—includes a menu icon with similar controls. You can open this menu from and inactive page by right-clicking the page tab. For more information, see Section 2.6, "Initiating Actions from Tabs." Section 2.6 covers tasks not covered in this chapter, including renaming a page, exposing a group space page in a personal space, and obtaining information about a page.

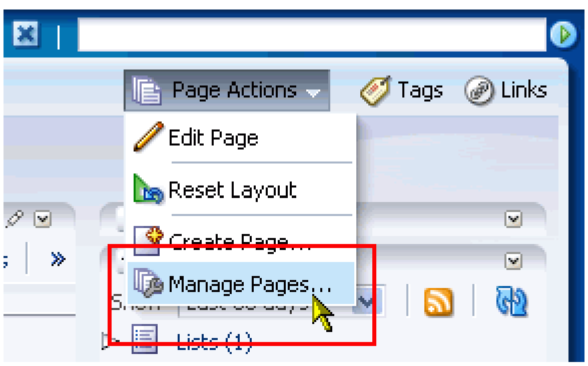
You can also open pages from the Manage Pages dialog. Simply click the page name in the **Name** column, and the page opens in WebCenter Spaces. The Manage Pages dialog closes automatically.

7.2 Opening the Manage Pages Dialog

To open to the Manage Pages dialog:

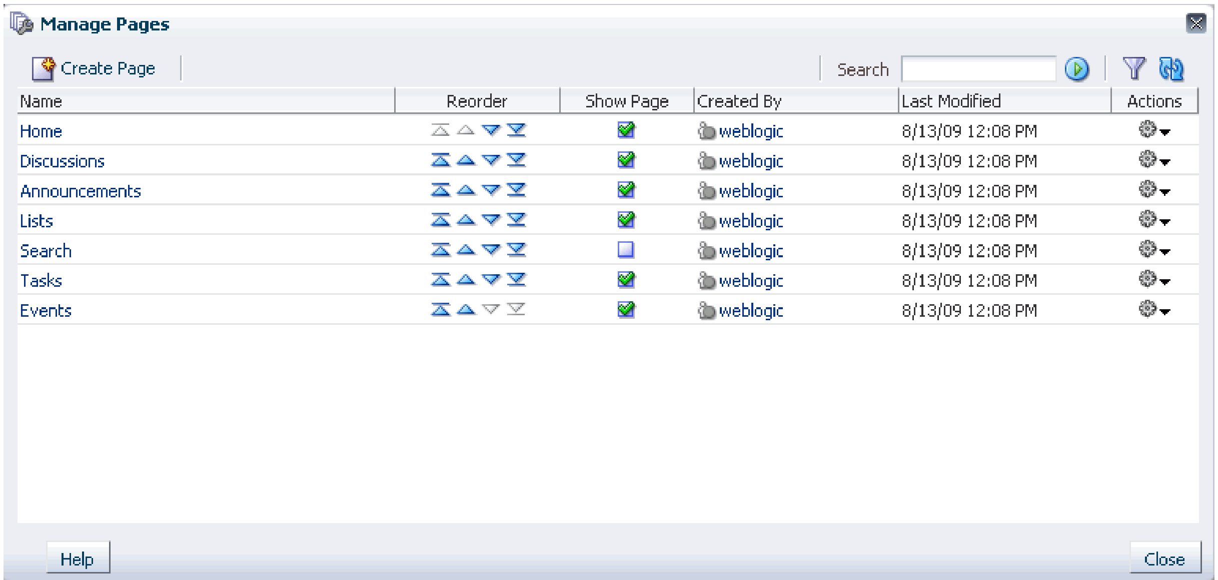
1. Log in, and go to your personal space or the group space with pages you want to manage.
2. Open the **Page Actions** menu, and select the **Manage Pages** option (Figure 7–5).

Figure 7–5 Manage Pages Option on the Page Actions Menu



The Manage Pages dialog opens (Figure 7–6).

Figure 7–6 The Manage Pages Dialog



Click the **Close** button to exit the dialog.

7.3 Finding Pages in the Manage Pages Dialog

The Manage Pages dialog includes two features for locating a page or group of pages in a personal or group space: *search* and *filter*. Both features render lists of pages that match your search or filter criteria.

This section describes how to use the search and filter features in the Manage Pages dialog. It contains the following subsections:

- Section 7.3.1, "Searching for Pages in the Manage Pages Dialog"
- Section 7.3.2, "Filtering Your View of Pages in the Manage Pages Dialog"

7.3.1 Searching for Pages in the Manage Pages Dialog

The Manage Pages dialog provides a search feature for quickly locating one or more pages of interest. Search results display in the dialog; click a result to open its associated page in WebCenter Spaces.

When you close the Manage Pages dialog, your search terms are automatically cleared. You can also clear them explicitly by clicking the **Clear Search** button.

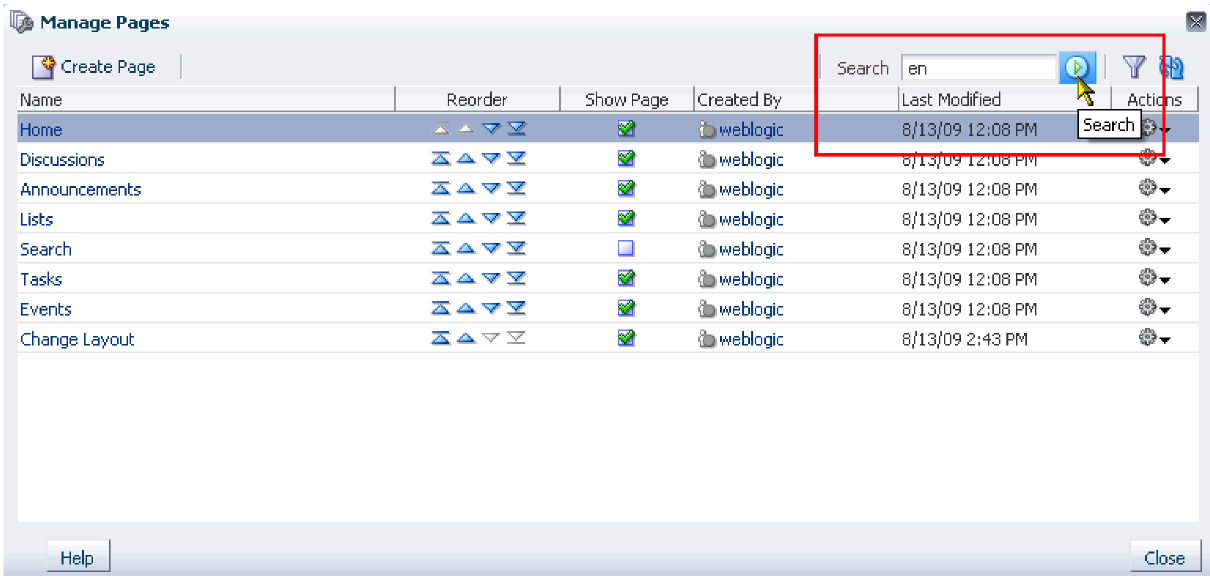
To search for a page in the Manage Pages dialog:

1. Log in, go to your personal space or the group space you want to search, and open the Manage Pages dialog.

   For information about opening the Manage Pages dialog, see Section 7.2, "Opening the Manage Pages Dialog."

2. Enter a full or partial search term in the **Search** field, and then click the **Search** icon (Figure 7–7).

Figure 7–7 The Search Field and Search Icon in the Manage Pages Dialog

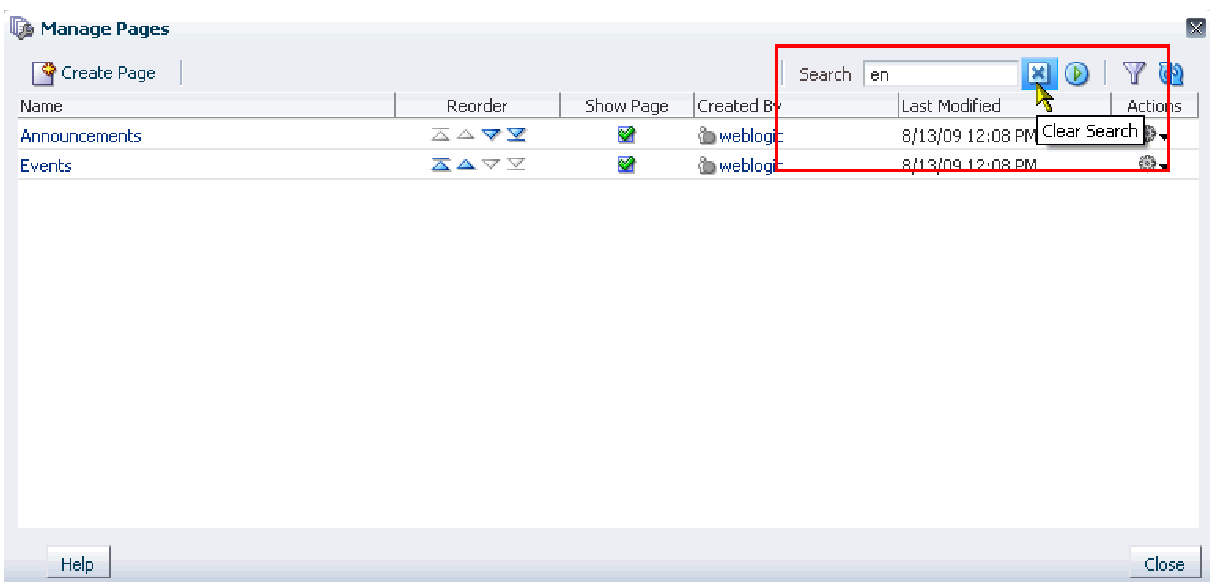


> **Tip:** Search terms are not case sensitive.

The Manage Pages dialog refreshes with all pages matching the search term.

3. Click the **Clear Search** icon next to the **Search** field to exit search and restore the dialog to its default view (Figure 7–8).

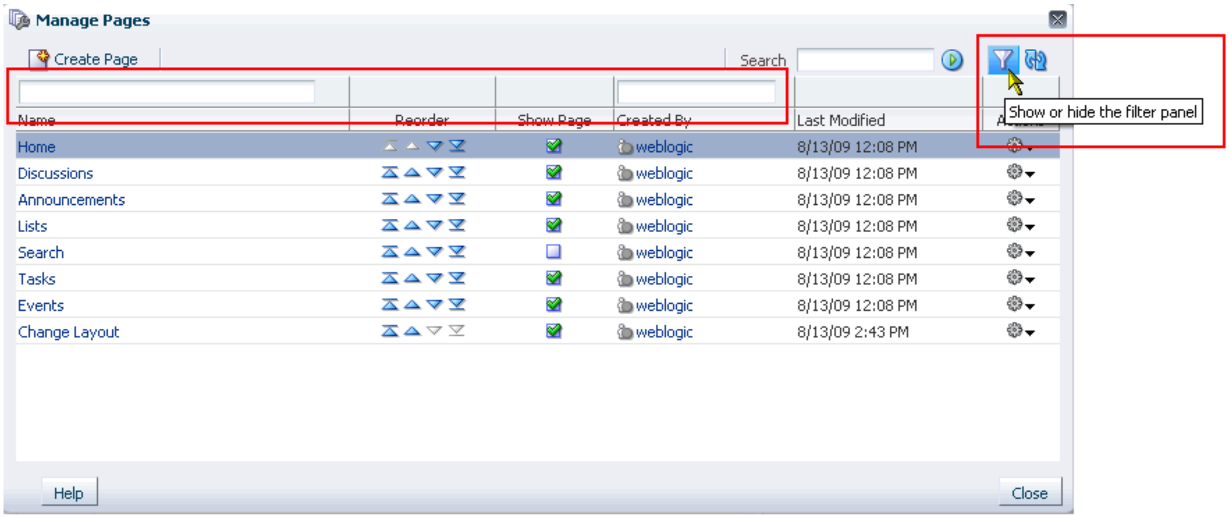
Figure 7–8 The Clear Search Icon



7.3.2 Filtering Your View of Pages in the Manage Pages Dialog

Filtering enables you to locate pages by name and by the user name of the person who created them. In the Manage Pages dialog, the **Show or hide the filter panel** icon is a toggle switch you click both to open and close the filter panel (Figure 7–9).

Figure 7–9 The Show or hide the filter panel Icon and the Filter Panel



When you close the Manage Pages dialog, your filtering terms are automatically cleared. You can also clear them explicitly by deleting your terms from the **Filter** panel and pressing Enter.

To locate a page by filtering the list of pages in the Manage Pages dialog:

1. Log in, go to your personal space or the group space in which to locate a page, and open the Manage Pages dialog.

   For information about opening the Manage Pages dialog, see Section 7.2, "Opening the Manage Pages Dialog."

2. Click the **Show or hide the filter panel** icon.

3. In the resulting filter panel, enter a full or partial filtering term in either or both fields above the **Name** and **Created By** columns, and press Enter.

   > **Tip:** Filtering terms are not case sensitive.

   The Manage Pages dialog refreshes with all pages matching the filtering term(s).

To return the Manage Pages dialog to its default mode, delete your filtering terms and press the Enter key. To close the filter panel, click the **Show or hide the filter panel** icon.

7.4 Changing the Order of Pages Through the Manage Pages Dialog

By default, pages are arranged in the order they are created. You may want to rearrange the default order, adding emphasis to more critical pages by placing them earlier in the succession of tabs. Such changes are *personalizations* in that they affect only your view of page order.

> **See Also:** Group spaces provide controls that enable group space administrators to reorder group space pages for everyone. For more information, see Section 13.5, "Managing Group Space Pages."

To change the order of pages through the Manage Pages dialog:

1. Log in, go to your personal space or the group space in which to change the display order of pages, and open the Manage Pages dialog.

   For information about opening the Manage Pages dialog, see Section 7.2, "Opening the Manage Pages Dialog."

2. In the **Reorder** column, click the up arrow next to a page to move the page higher in the page order (the page's tab is moved closer to the start of tab order); or click the down arrow next to a page to move the page lower in the page order (the page's tab is moved further from the start of tab order).

   Alternatively, click and hold a page row, and drag and drop it to the desired position.

3. Click the **Close** button when you finish reordering pages.

   Pages are rendered in the order you specified.

7.5 Setting Page Creation Defaults for Your Personal Pages

Use page creation options to predetermine the values to use in creating pages in your personal space. Normally, when you create a page you are prompted to provide values for the page scheme and page template. Using page creation options, you can specify default values for scheme and template and consequently skip making those selections during page creation.

You can set page creation options for yourself so that every page you create in your personal space uses the same defaults. An administrator can set page creation options for all users' personal spaces. The settings you establish for yourself override any settings an administrator may provide.

> **See Also:** For information about setting up personal space page creation options for the application, see the "Setting Up a Default Look and Feel for Personal Pages" section in the *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter*.

The page creation options you set through the Manage Pages dialog influence all the pages you create in your personal space, whether you create them through the Manage Pages dialog or through some other page creation mechanism.

This section provides an overview of default page styles and schemes and describes how to set page creation defaults for your personal space. It includes the following subsections:

- Section 7.5.1, "Introducing Default Page Schemes and Styles"
- Section 7.5.2, "Setting Page Creation Defaults for Personal Pages"

7.5.1 Introducing Default Page Schemes and Styles

This section provides two tables that illustrate default page schemes and styles:

- Table 7–1, " Seeded Page Schemes"
- Table 7–2, " Seeded Page Styles"

Table 7–1 illustrates how each scheme selection looks on a blank page. Note that each scheme selection also provides font and color styles that are not evident on an unpopulated page.

Table 7–1 Seeded Page Schemes

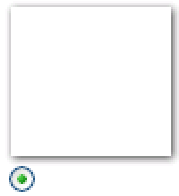
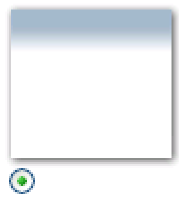
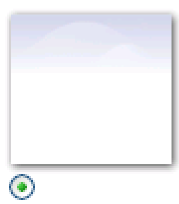
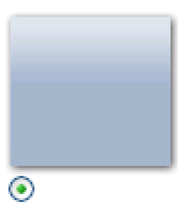
Default Scheme	How this Scheme Looks on a Blank Page
Blank	
Blue	
Clouds	
Dunes	
Egg Shell	
Paper	

Table 7–1 (Cont.) Seeded Page Schemes

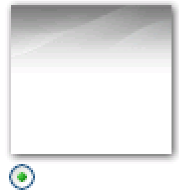
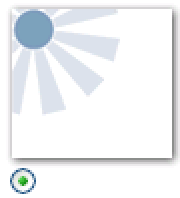
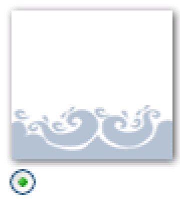
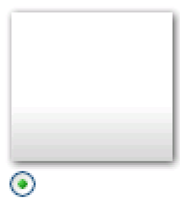
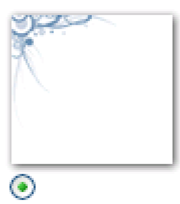
Default Scheme	How this Scheme Looks on a Blank Page
Stream	
Sun	
Wave	
White	
Winter	
Custom	Provide your own background image by entering the directory path to the image in the **Scheme Background Image** field that opens when you select **Custom**. Enter, for example: `http://mycompany.com/images/chinwig/cologo_small.gif`

Table 7–2 illustrates and describes each style selection.

Users with the relevant level of permissions can switch some page layouts (styles) at runtime. In addition to illustrating different page layouts, Table 7–2 also indicates which layouts can and cannot be switched at runtime.

Note: For information about switching page layouts at runtime, see Section 4.2.2, "Changing Your Page Layout" (personalization) and Section 8.4.3, "Changing Everyone's Page Layout" (customization).

Table 7–2 Seeded Page Styles

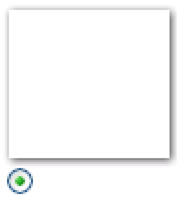
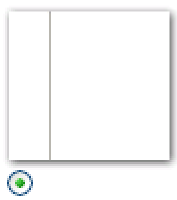
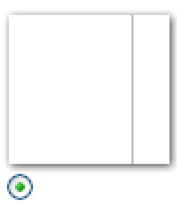
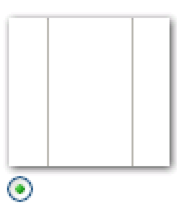
Name	Illustration	Description
Blank		A one-column page with one layout box into which you can add content. When you edit this page, a **Change Layout** link is provided to enable you to change the number and configuration of layout boxes on the page. For more information, see Section 8.4.3, "Changing Everyone's Page Layout." Note that a **Change Layout** link may also be available in page view mode. When you change page layout in page view mode, it is a personalization affecting only your view of the page. For more information, see Section 4.2.2, "Changing Your Page Layout."
Left Narrow		A two-column page with two layout boxes into which you can add content. Layout boxes are positioned side-by-side, with the narrower layout box on the left. When you edit this page, a **Change Layout** link is provided to enable you to change the number and configuration of layout boxes on the page. For more information, see Section 8.4.3, "Changing Everyone's Page Layout." Note that a **Change Layout** link may also be available in page view mode. When you change page layout in page view mode, it is a personalization affecting only your view of the page. For more information, see Section 4.2.2, "Changing Your Page Layout."
Right Narrow		A two-column page with two layout boxes into which you can add content. Layout boxes are positioned side-by-side, with the narrower layout box on the right. When you edit this page, a **Change Layout** link is provided to enable you to change the number and configuration of layout boxes on the page. For more information, see Section 8.4.3, "Changing Everyone's Page Layout." Note that a **Change Layout** link may also be available in page view mode. When you change page layout in page view mode, it is a personalization affecting only your view of the page. For more information, see Section 4.2.2, "Changing Your Page Layout."
Three Column		A three-column page with three layout boxes into which you can add content. Layout boxes are positioned side-by-side, with the narrower layout boxes on the left and right sides. When you edit this page, a **Change Layout** link is provided to enable you to change the number and configuration of layout boxes on the page. For more information, see Section 8.4.3, "Changing Everyone's Page Layout." Note that a **Change Layout** link may also be available in page view mode. When you change page layout in page view mode, it is a personalization affecting only your view of the page. For more information, see Section 4.2.2, "Changing Your Page Layout."

Table 7–2 (Cont.) Seeded Page Styles

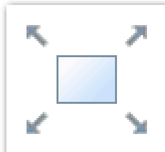
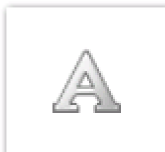
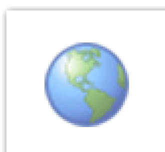
Name	Illustration	Description
Stretch		A page dedicated to the display of one task flow. Any task flow you place on this page is maximized, taking up all available space. For an example of a page based on the Stretch style, see the **Documents** page or the **Announcements** page in your WebCenter Spaces application. This page style cannot be changed when you edit the page.
Text Page		A page with a seeded Text component (that is, a Rich Text Editor), which you can use to enter and apply styles to text. For information about the Rich Text Editor, see Section 18.4.3.3, "Creating and Editing Rich Text Documents." When you edit this page, a **Change Layout** link is provided to enable you to change the number and configuration of layout boxes on the page. For more information, see Section 8.4.3, "Changing Everyone's Page Layout." Note that a **Change Layout** link may also be available in page view mode. When you change page layout in page view mode, it is a personalization affecting only your view of the page. For more information, see Section 4.2.2, "Changing Your Page Layout."
Web Page		A page that takes a URL value, enabling you to expose external web content in your WebCenter Spaces application. For more information, see Chapter 30, "Working with Wikis and Blogs" This page style cannot be changed when you edit the page.

Table 7–2 (Cont.) Seeded Page Styles

Name	Illustration	Description
Home Page		A preseeded Home page, based on the Right Narrow Column Layout page style. The Home page style comes prepopulated with task flows and other content. When you edit this page, a **Change Layout** link is provided to enable you to change the number and configuration of layout boxes on the page. For more information, see Section 8.4.3, "Changing Everyone's Page Layout." Note that a **Change Layout** link may also be available in page view mode. When you change page layout in page view mode, it is a personalization affecting only your view of the page. For more information, see Section 4.2.2, "Changing Your Page Layout."
Wiki		A page preconfigured to expose wiki controls from the Oracle WebCenter Wiki and Blog Server. This page style becomes available in the Create Page dialog when the server is integrated with WebCenter Spaces. This page style cannot be changed when you edit the page.
Blog		A page preconfigured to expose blog controls from the Oracle WebCenter Wiki and Blog Server. This page style becomes available in the Create Page dialog when the server is integrated with WebCenter Spaces. This page style cannot be changed when you edit the page.

7.5.2 Setting Page Creation Defaults for Personal Pages

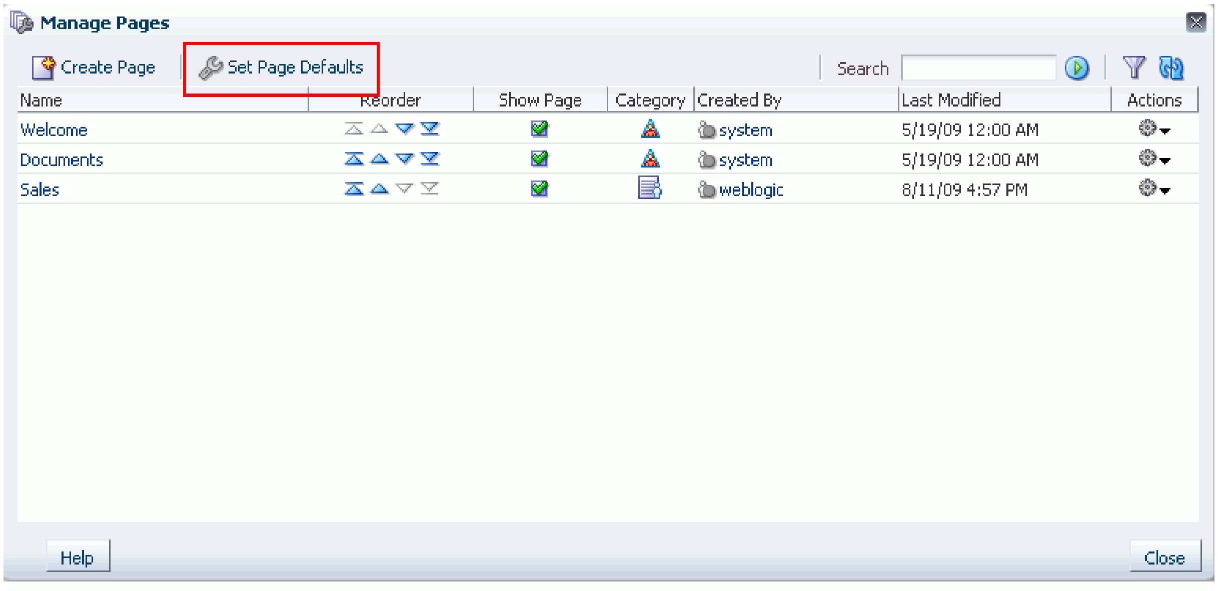
To set page creation defaults for your personal space:

1. Log in, go to your personal space, and open the Manage Pages dialog.

   For information about opening the Manage Pages dialog, see Section 7.2, "Opening the Manage Pages Dialog."

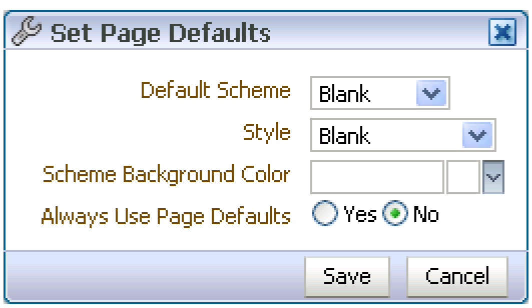
2. Click the **Set Page Defaults** button (Figure 7–10).

Figure 7–10 The Set Page Defaults Button



The Set Page Defaults dialog opens (Figure 7–11).

Figure 7–11 The Set Page Defaults Dialog



3. Set your page defaults:

   a. Select a design scheme for new pages from the **Default Scheme** dropdown list.

      For an illustration of each scheme, see Table 7–1, " Seeded Page Schemes".

   b. Select a layout from the **Style** dropdown list.

      For an illustration and description of each style, see Table 7–2, " Seeded Page Styles".

   c. Select a page background color from the **Scheme Background Color** dropdown list.

   d. If you selected **Custom** from the **Default Scheme** dropdown list, enter the URL to the image to use for the custom scheme in the **Scheme Background Image** field.

      Enter for example:

      ```
      http://mycompany.com/images/chinwig/cologo_small.gif
      ```

This field appears only when **Custom** is selected from the **Default Scheme** dropdown list.

e. Select an option next to **Always Use Page Defaults**:

Yes—When you create pages in your personal space, skip the Create Page dialog, and create the page using the defaults you set here.

No—When you create pages in your personal space, have the defaults you set here preselected in the Create Page dialog.

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

Going forward, when you create pages in your personal space, the defaults you set here determine the scheme and style that are preselected for the new page and whether the Create Page dialog opens.

7.6 Creating a Page Through the Manage Pages Dialog

The Manage Pages dialog provides a means of creating new pages in personal and group spaces. Page creation through the Manage Pages dialog can be affected by whether you are creating a page in a personal space or a group space.

When you create a page in a personal space, either a page is instantly created or the Create Page dialog opens and presents options for determining the page layout and scheme and the scheme background color. What happens is influenced by the default page creation options you select (for more information, see Section 7.5, "Setting Page Creation Defaults for Your Personal Pages").

In a group space, the Create Page dialog always opens.

This section describes page creation as it occurs when the Create Page dialog opens.

> **See Also:** The Manage Pages dialog provides one way to create pages. Learn another way in Chapter 8, "Creating, Editing, and Deleting Pages."

To create a page through the Manage Pages dialog:

1. Log in, go to your personal space or the group space in which to create a page, and open the Manage Pages dialog.

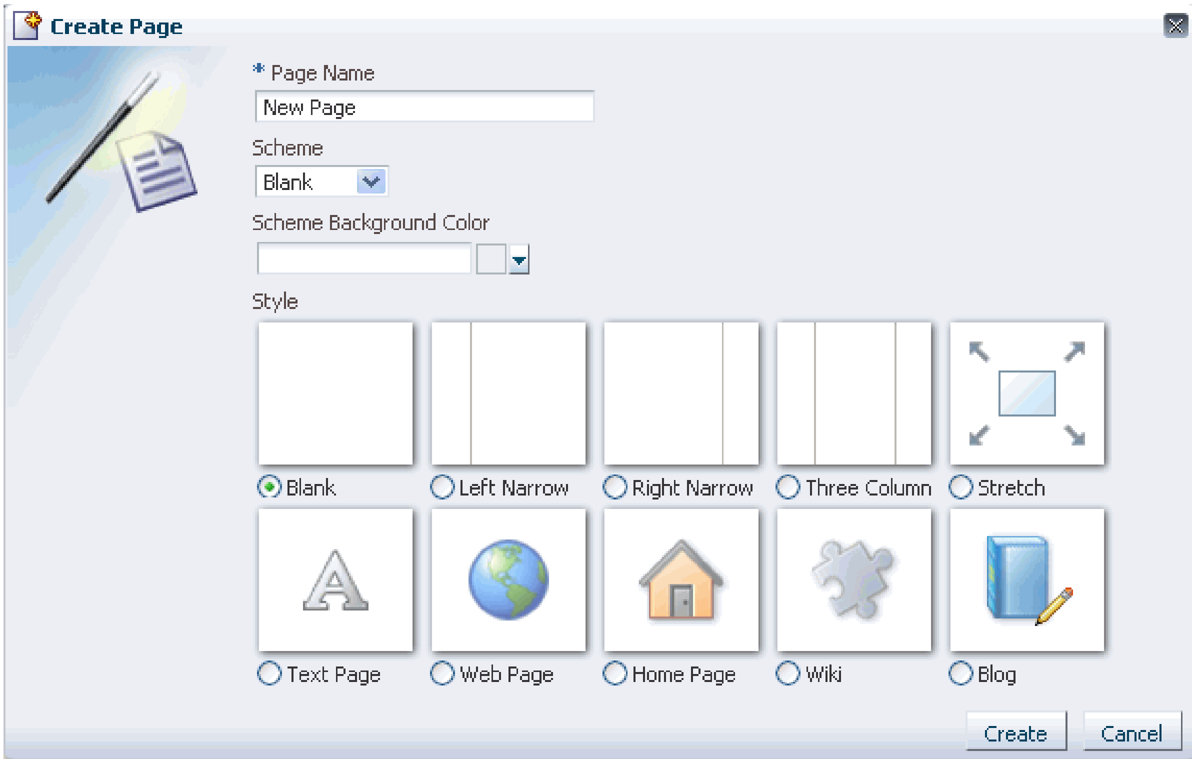
   For information about opening the Manage Pages dialog, see Section 7.2, "Opening the Manage Pages Dialog."

2. Click the **Create Page** button.

   If your default page creation page options are preset to omit prompting you with page creation options, the page is created without further steps (for more information, see Section 7.5, "Setting Page Creation Defaults for Your Personal Pages").

   Otherwise, the Create Page dialog opens (Figure 7–12).

Figure 7–12 The Create Page Dialog



3. In the Create Page dialog, enter a display name for the page in the **Page Name** field.

   The name you enter here appears on the page's tab and in the Manage Pages dialog.

4. Optionally, from the **Scheme** dropdown list, select a scheme for the page.

   The scheme provides a seeded background image or enables you to select your own background image. For illustrations of seeded schemes, see Table 7–1.

5. Optionally, pick a background color for the page from the **Scheme Background Color** dropdown list.

6. If you selected **Custom** from the **Scheme** dropdown list, enter the URL to the custom image you want to use for your page background in the **Scheme Background Image** field.

   Enter, for example:

   ```
   http://mycompany.com/images/chinwig/cologo_small.gif
   ```

   This field appears only when **Custom** is selected from the **Default Scheme** dropdown list.

7. Select the style you want to apply to the new page.

   For an illustration and description of each page style, see Table 7–2.

8. Click the **Create** button.

   The page is created and immediately displayed in edit mode in Oracle Composer. From here, you can add files, task flows, and other types of content and share your information with others.

See Also: After you create a page, the following sections may be useful to you as you take your next steps:

- For information about adding layout components, see Chapter 9, "Working with Page Layout Components."
- For information about adding files, see Section 10.1.3, "Adding Documents to a Page."
- For information about adding task flows, see Section 10.1.4, "Adding Task Flows to a Page."
- For information about adding portlets to a page, see Section 10.1.5, "Adding Portlets to a Page."

7.7 Setting and Revoking Page Access Permissions

Within a given personal or group space, you can assign different page access privileges to different users or user roles. For example, you can share page management access with a coworker who is jointly leading a particular effort. You may want to give customization access to your team, or editorial access to a colleague who normally would only be able to view the page.

You can use the page access settings available through the Manage Pages dialog to provide page access to a select list of specified users and user roles. You can also use page access settings to make a page publicly available.

This section describes how to configure custom page access. It contains the following subsections:

- Section 7.7.1, "Setting Custom Page Access"
- Section 7.7.2, "Making a Personal Page Public"
- Section 7.7.3, "Revoking Custom Page Access"

Note: By default, all group space pages are automatically visible to all group space members. Using the procedure described in this section, you can set explicit access on a group space page to restrict it to a set of users or roles.

See Also: Making a group space or a group space page publicly accessible is an administrative function. For more information, see Section 13.12.3, "Granting Public Access to a Group Space."

7.7.1 Setting Custom Page Access

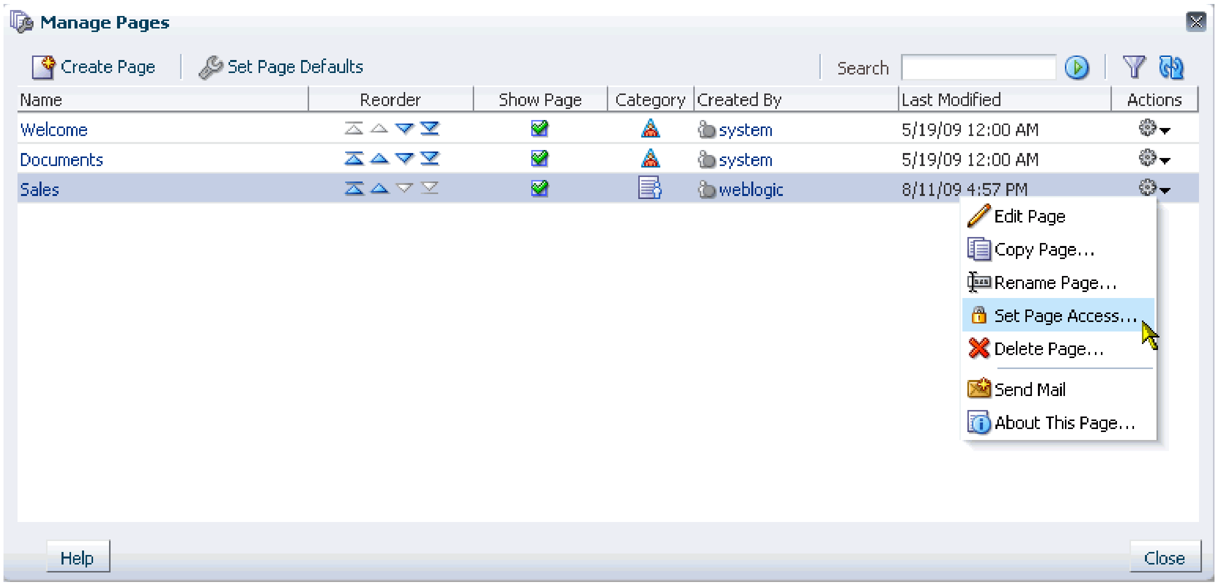
To configure custom page access through the Manage Pages dialog:

1. Log in, go to your personal space or the group space in which to configure custom page access, and open the Manage Pages dialog.

   For information about opening the Manage Pages dialog, see Section 7.2, "Opening the Manage Pages Dialog."

2. In the **Actions** column, click the **Actions** icon in the row of the page on which to set access and select **Set Page Access** from the resulting menu (Figure 7–13).

Figure 7–13 The Actions Icon and Set Page Access Command



The Set Page Access dialog opens.

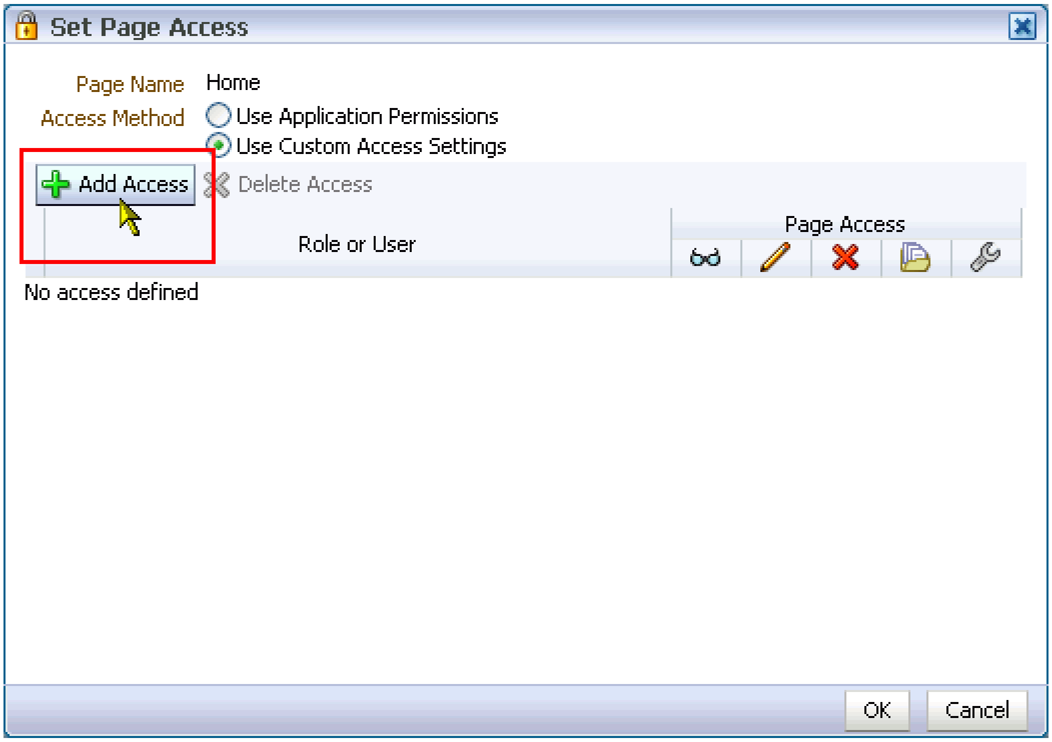
3. For group space pages only, select from:

   - **Use Application Permissions** to have page access handled by permissions set at the application level. If you select this option, skip to step 10.
   - **Use Custom Access Settings** to set custom access on the current page.

   These options are provided for group space pages only. They do not appear in the Set Page Access dialog for pages in a personal space.

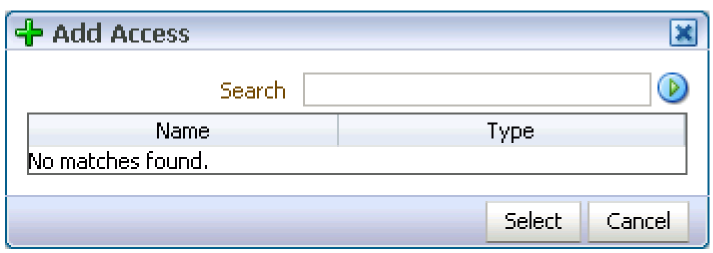
4. Click the **Add Access** button (Figure 7–14).

Figure 7–14 The Add Access Button in the Set Page Access Dialog



The Add Access dialog opens (Figure 7–15).

Figure 7–15 The Add Access Dialog



5. In the **Search** field, enter the name of the user or role for whom you want to define page security, and click the **Search** icon.

   Optionally, enter a search term of at least two characters, and click the **Search** icon.

6. Select a user name or role by clicking its row.

   To make multiple selections:

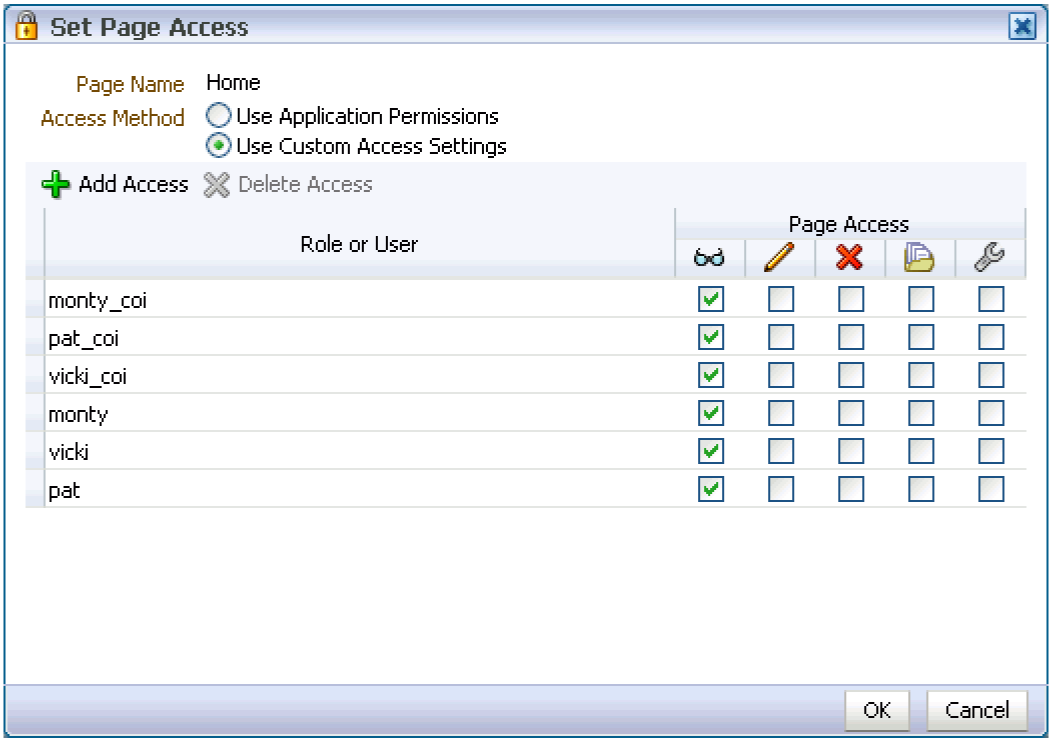
   - **Ctrl-Click** to select multiple rows.
   - **Shift-Click** to select a range of rows.

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

7. Click the **Select** button.

The Add Access dialog closes, and the Set Page Access dialog populates with the selected users (Figure 7–16).

Figure 7–16 Populated Set Page Access Dialog



8. Repeat steps 4 through 7 to add all the users and roles of interest to the Set Page Access dialog.
9. For each role or user, set custom access by selecting one or more access privileges from the **Page Access** columns.

   By default, all authenticated users and user roles are granted page view access. The other access privileges require page view access.

   Table 7–3 lists and describes the access privileges available from the **Page Access** column in the Set Page Access dialog.

Table 7–3 Page Access Privileges in the Set Page Access Dialog

Icon	Name	Description
	View Page	User or role can access the page for viewing, but cannot perform any other actions on the page.
	Edit Page	User or role can edit the page using Oracle Composer. This includes adding, rearranging, and deleting content; renaming the page; and changing page properties, such as the page scheme.

Table 7–3 (Cont.) Page Access Privileges in the Set Page Access Dialog

Icon	Name	Description
	Delete Page	User or role can delete the page.
	Perform All Page Actions	User or role can perform all actions on the page.
	Personalize Page	User or role can rearrange page content and personalize their view of task flows, provided the task flow includes personalization settings.

10. Click **OK** to save your changes and close the Set Page Access dialog.
11. Click **Close** to exit the Manage Pages dialog.

> **Note:** Page access permissions set through the Manage Pages dialog take effect when you click **OK**.
>
> Page access permissions set through the Page Properties dialog in Oracle Composer are committed immediately. Closing Oracle Composer without saving does not discard such changes.

7.7.2 Making a Personal Page Public

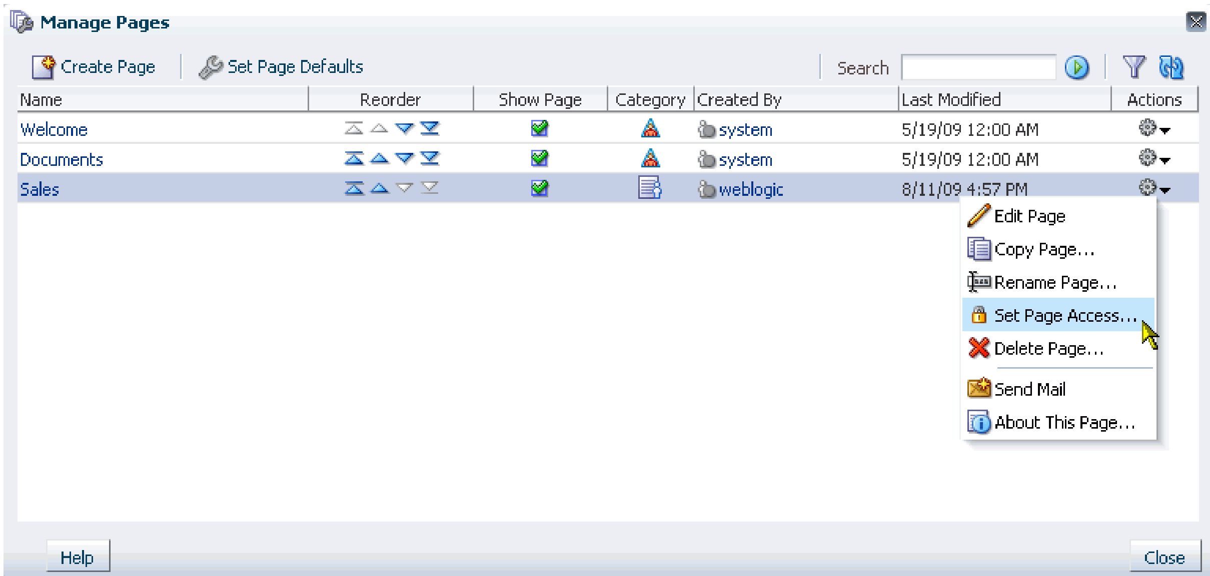
To make a personal page public:

1. Log in, go to your personal space, and open the Manage Pages dialog.

   For information about opening the Manage Pages dialog, see Section 7.2, "Opening the Manage Pages Dialog."

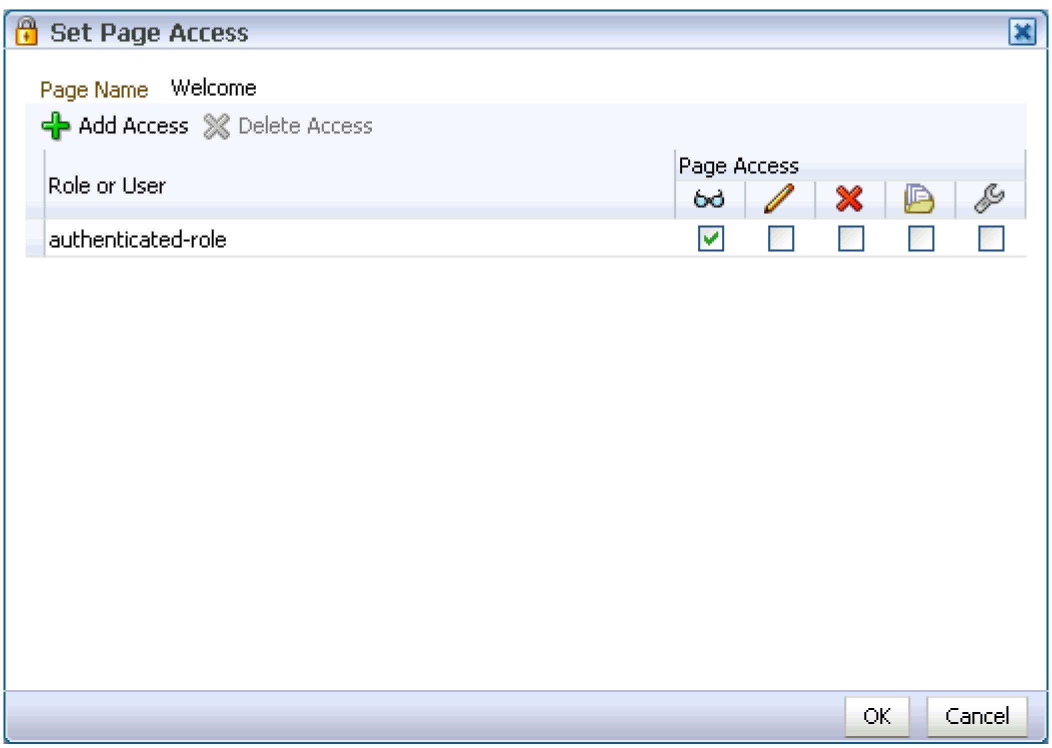
2. In the **Actions** column, click the **Actions** icon in the row of the page to make public and select **Set Page Access** from the resulting menu (Figure 7–17).

Figure 7–17 The Actions Icon and Set Page Access Command



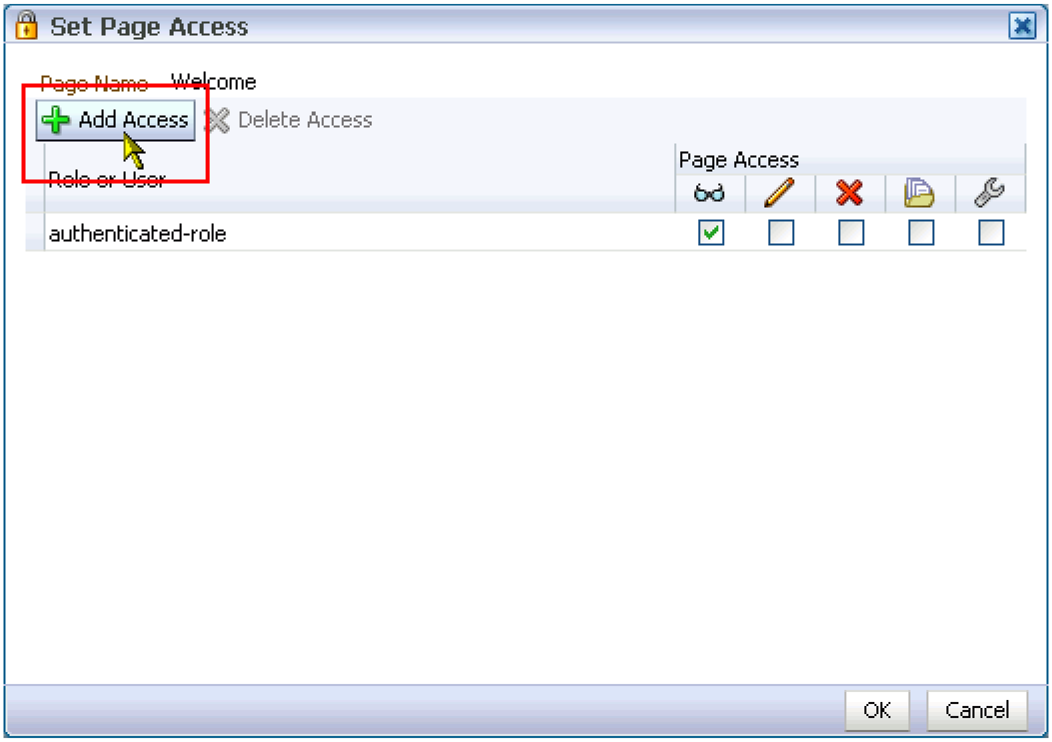
The Set Page Access dialog opens (Figure 7–18).

Figure 7–18 The Set Page Access Dialog for a Personal Space Page



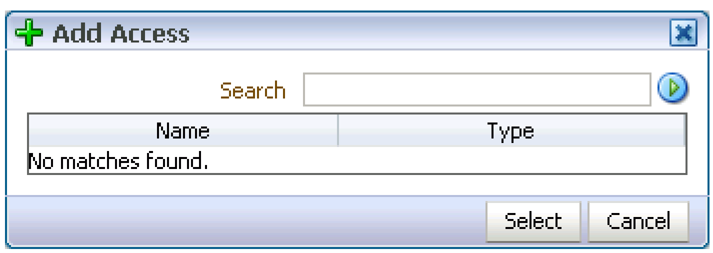
3. Click the **Add Access** button (Figure 7–19).

Figure 7–19 The Add Access Button in the Set Page Access Dialog



The Add Access dialog opens (Figure 7–20).

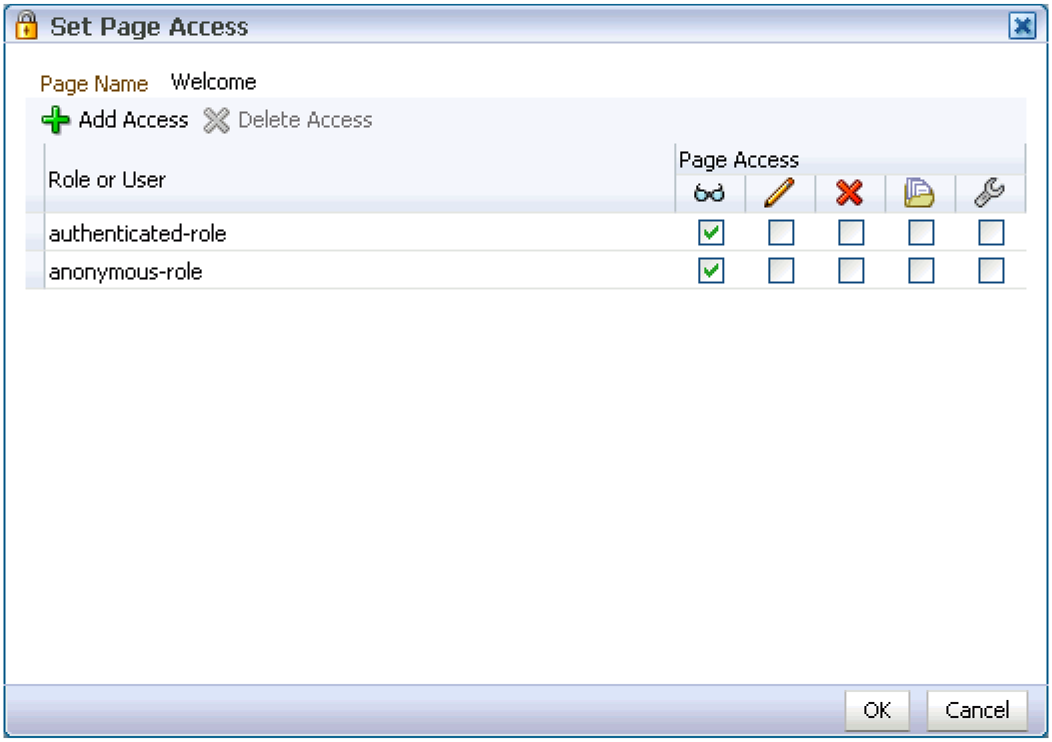
Figure 7–20 The Add Access Dialog



4. In the **Search** field, enter `anonymous-role`, and click the **Search** icon.
5. Select `anonymous-role` under the **Name** column, and click the **Select** button.

   The Add Access dialog closes, and the Set Page Access dialog populates with your selection (Figure 7–21).

Figure 7–21 Populated Set Page Access Dialog



6. Set custom access by selecting one or more access privileges from the **Page Access** columns (see Table 7–3).

   By default, all authenticated users and user roles are granted page view access. The other access privileges require page view access.

7. Click **OK** to save your changes and close the Set Page Access dialog.
8. Click **Close** to exit the Manage Pages dialog.
9. Copy the URL of the public page, and send it to whomever you want to notify.

   Users can access the public page without logging in.

7.7.3 Revoking Custom Page Access

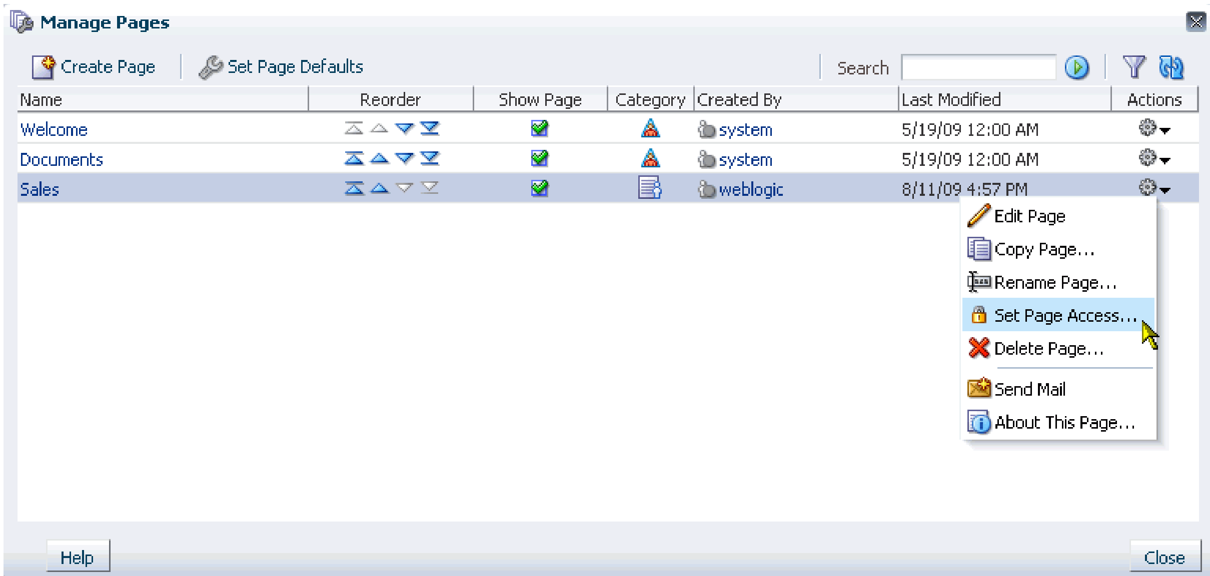
To revoke custom page access:

1. Log in, go to your personal space or the group space in which to revoke custom page access, and open the Manage Pages dialog.

   For information about opening the Manage Pages dialog, see Section 7.2, "Opening the Manage Pages Dialog."

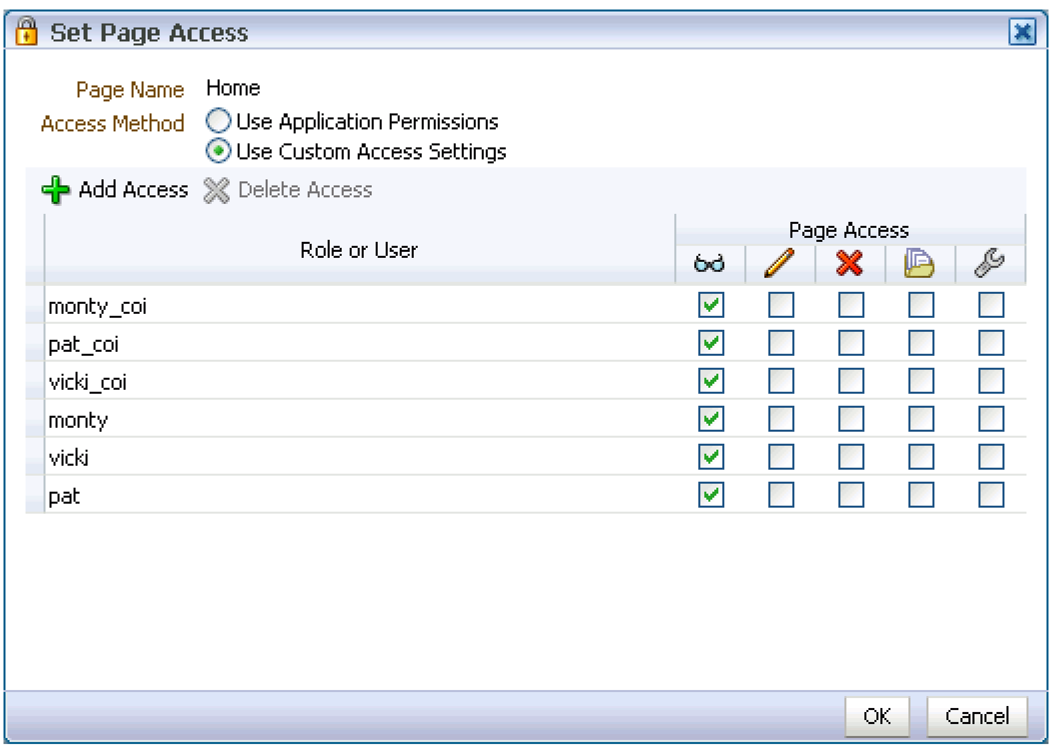
2. In the **Actions** column, click the **Actions** icon in the row of the page from which to revoke access and select **Set Page Access** from the resulting menu (Figure 7–22).

Figure 7–22 The Actions Icon and Set Page Access Command



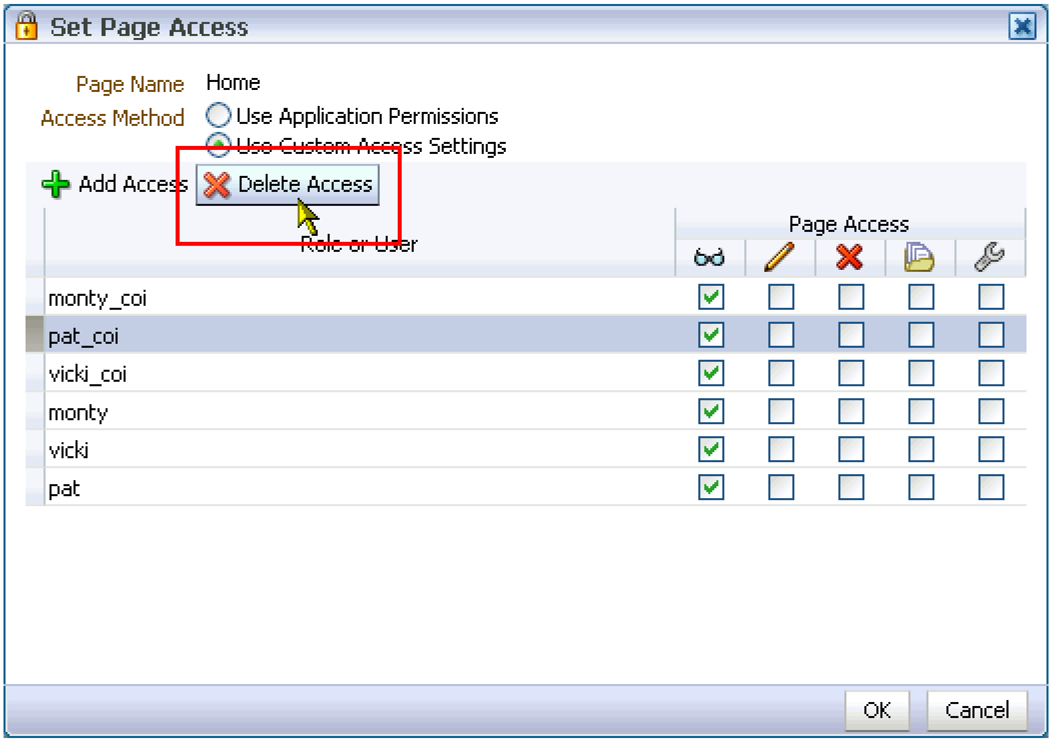
The Set Page Access dialog opens (Figure 7–23).

Figure 7–23 The Set Page Access Dialog



3. Select the role or user for which to revoke access, and click the **Delete Access** button (Figure 7–24).

Figure 7–24 The Delete Access Button in the Set Page Access Dialog



4. In the Delete Page Access dialog, click **Delete** (Figure 7–25).

Figure 7–25 Delete Page Access Dialog

The selected user or role is removed from the list of roles and users, and the role or user's page access permissions are revoked.

5. Click **OK** to close the Set Page Access dialog.
6. Click **Close** to exit the Manage Pages dialog.

7.8 Copying a Page Through the Manage Pages Dialog

Copying a page provides a quick, easy way to create multiple pages that use the same scheme and layout and contain the same content with the same customizations. Copying a page is a two-click operation through the Manage Pages dialog.

Note: In a group space, you must have the `Pages-Create` permission to copy a page. If you have not been granted this permission, then the **Copy Page** selection is not available to you. To request a change of permission, see your group space moderator.

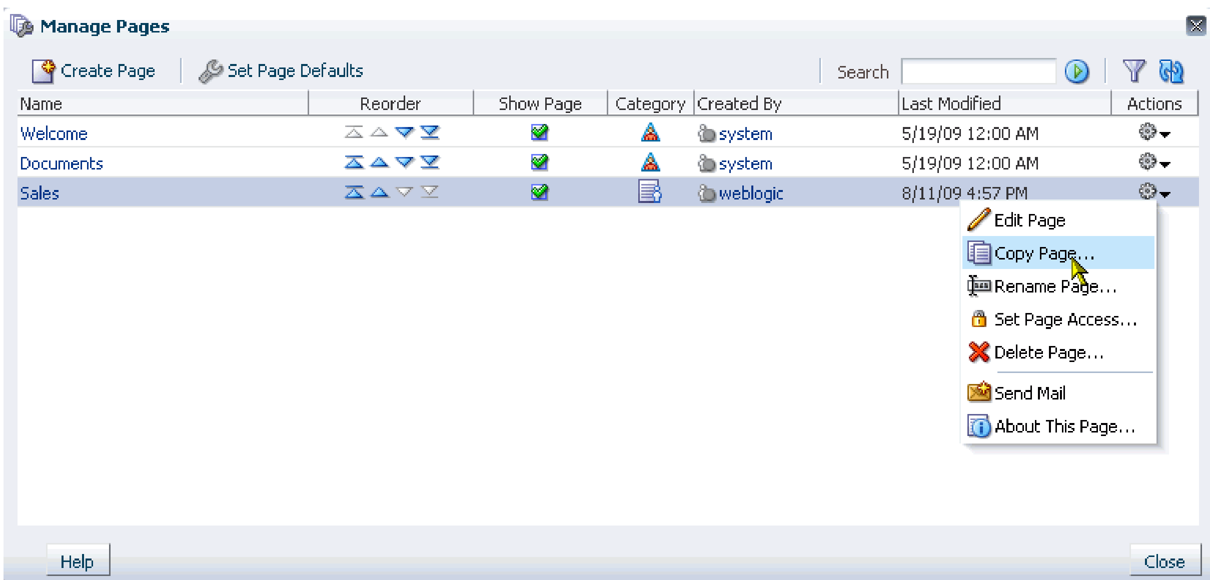
To copy a page through the Manage Pages dialog:

1. Log in, go to your personal space or the group space in which to copy a page, and open the Manage Pages dialog.

   For information about opening the Manage Pages dialog, see Section 7.2, "Opening the Manage Pages Dialog."

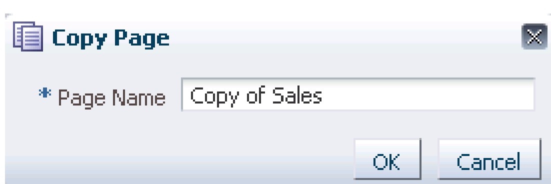
2. In the row of the page you want to copy, click the **Actions** icon and select **Copy Page** from the resulting menu (Figure 7–26).

Figure 7–26 The Copy Page Command on the Actions Menu



The Copy Page dialog opens (Figure 7–27).

Figure 7–27 The Copy Page Dialog



3. Provide a new name for the copy, and click **OK**.

   You must provide a new name. You cannot leave this field blank.

   The Manage Pages dialog closes, and the new page opens in edit mode in Oracle Composer. All the task flows, portlets, and other page components are also copied, along with any customizations that were applied to them. Page access settings are not copied.

7.9 Entering Edit Mode Through the Manage Pages Dialog

Oracle Composer provides the runtime page-editing environment for all WebCenter application pages. One way to access Oracle Composer is through the Manage Pages dialog. This section describes how.

> **See Also:** For information about Oracle Composer, see Section 6.2, "Introducing Oracle Composer."

To enter edit mode through the Manage Pages dialog:

1. Log in, go to your personal space or the group space containing the page you want to edit, and open the Manage Pages dialog.

   For information about opening the Manage Pages dialog, see Section 7.2, "Opening the Manage Pages Dialog."

2. Click the **Actions** icon in the row of the page you want to edit, and select **Edit Page** from the resulting menu.

   The Manage Pages dialog closes, and page opens in Oracle Composer.

7.10 Deleting a Page Through the Manage Pages Dialog

The Manage Pages dialog provides easy access to controls for deleting pages. Simply open the dialog, open the **Actions** menu next to the relevant page, and select **Delete Page**. This section provides the details.

To delete a page through the Manage Pages dialog:

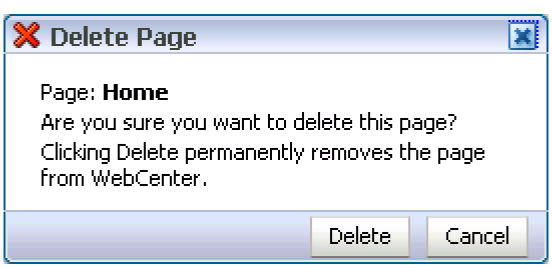
1. Log in, go to your personal space or the group space from which to delete a page, and open the Manage Pages dialog.

   For information about opening the Manage Pages dialog, see Section 7.2, "Opening the Manage Pages Dialog."

2. Click the **Actions** icon in the row of the page you want to delete and select **Delete Page** from the resulting menu.

   The Delete Page dialog opens (Figure 7–28).

Figure 7–28 The Delete Page Dialog



3. Click **Delete** to delete the page irrevocably from Oracle WebCenter Spaces.

4. Click the **Close** button to close the Manage Pages dialog.

8 Creating, Editing, and Deleting Pages

WebCenter Spaces puts within easy reach every resource necessary for building, managing, revising, and removing pages, with multiple options for performing these tasks to suit your working style. For example, you can create pages through the WebCenter Spaces Manage Pages dialog (Figure 8–1) and through the **Create Page** command on the **Page Actions** menu (Figure 8–2).

Figure 8–1 Create Page Button in the Manage Pages Dialog

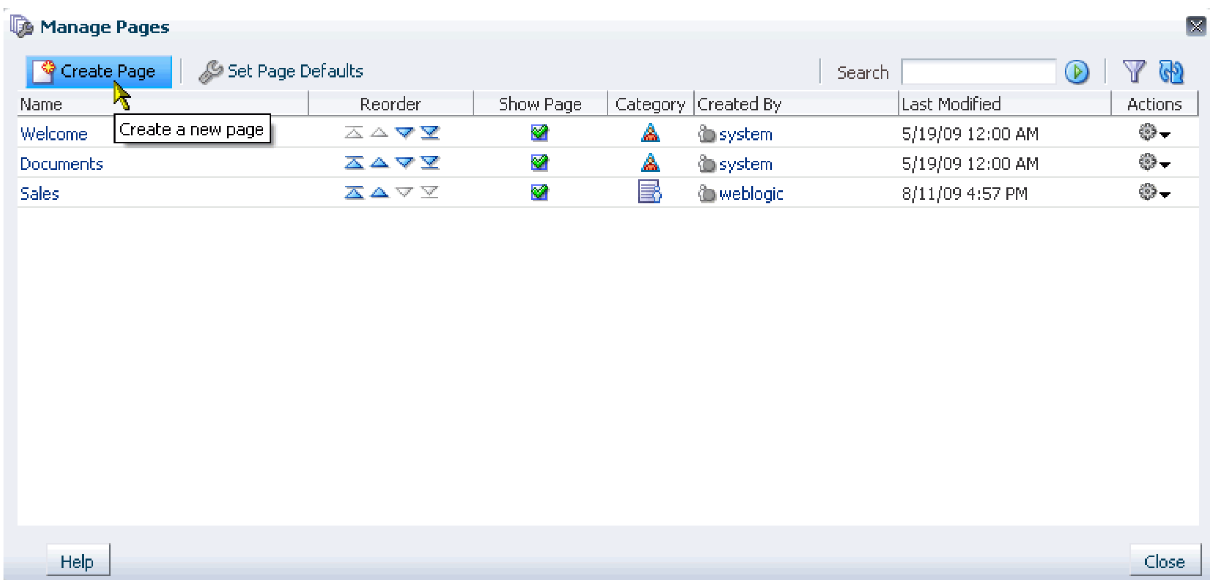
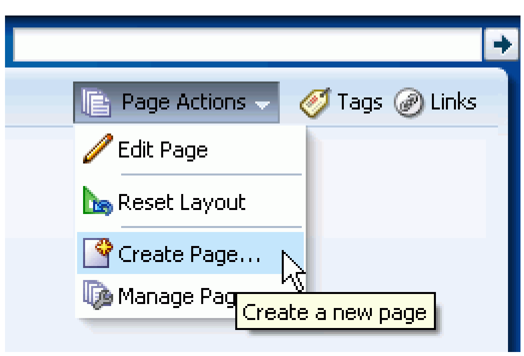


Figure 8–2 Create Page Command on the Page Actions Menu



This chapter provides information about creating pages, editing pages, switching page styles and schemes, working with page layout components, initiating page-related actions from page tabs, and deleting pages. It contains the following sections:

- Section 8.1, "Creating Pages"
- Section 8.2, "Editing Pages"
- Section 8.3, "Setting Page Access"
- Section 8.4, "Working with Page Layouts, Styles, and Schemes"
- Section 8.5, "Using Pretty URLs for WebCenter Spaces Pages"
- Section 8.6, "Deleting Pages"

> **See Also:** For information about creating pages through the WebCenter Spaces Manage Pages dialog, see Chapter 7, "Managing Pages."
>
> For introductory information to pages and the page editor (Oracle Composer), see Chapter 6, "Understanding the Page Service and Oracle Composer."

Audience

This chapter is intended for users who want to create and edit pages, revise page layouts, and delete pages. By default, every authenticated user can perform the actions described in this chapter in their own personal spaces. Note, however, that your application administrator may alter such default access privileges.

Sufficient access privileges must be assigned—through the grant of privileges or the assignment of a role—to create or edit pages in group spaces and custom WebCenter applications.

Much of the information in this chapter also applies to custom WebCenter applications, though it is written with WebCenter Spaces users in mind. (For information about the Page service in custom WebCenter applications, see the chapter "Enabling the Runtime Creation and Management of Pages" in *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter*.)

Your application administrator has the authority to expose or hide a particular service's task flows. Tasks discussed in this chapter are not available to you if the associated task flow is hidden.

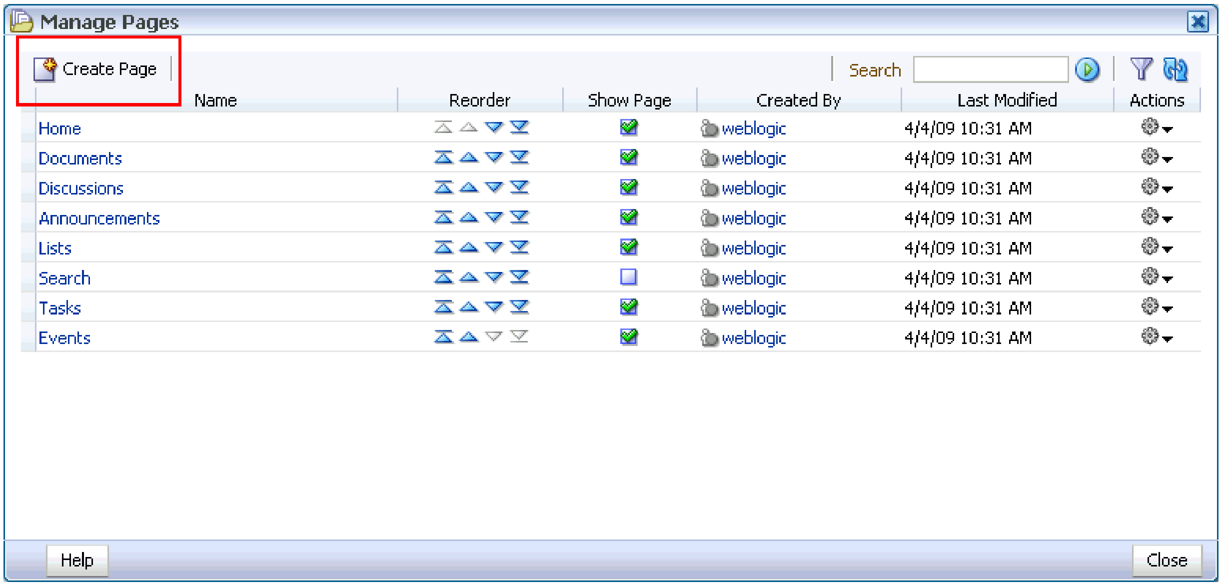
> **See Also:** For information about WebCenter Spaces seeded user roles, see the "Default Policy Store Permissions" section in the *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter*.

8.1 Creating Pages

In WebCenter Spaces, you can find the **Create Page** command in the following places:

- The Manage Pages dialog (Figure 8–3)

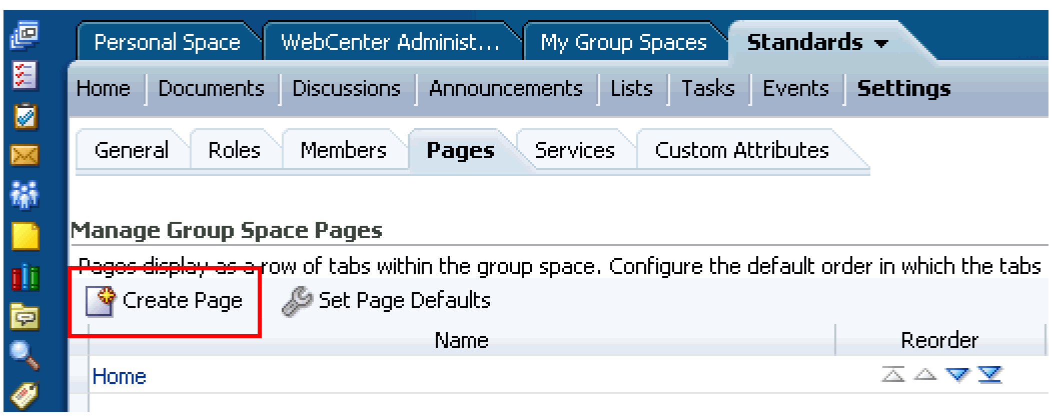
Figure 8–3 Create Page Command in a Manage Pages Dialog (Group Space View)



See Section 7.6, "Creating a Page Through the Manage Pages Dialog."

- The **Pages** subtab under the **Settings** tab in a group space (Figure 8–4)

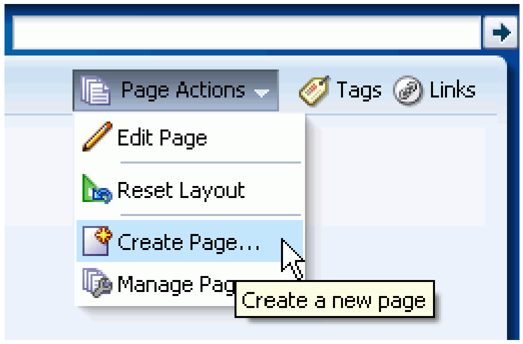
Figure 8–4 Create Page Command on the Pages Subtab (Group Space Only)



For more information about the **Pages** subtab, see Section 13.5, "Managing Group Space Pages."

- The **Page Actions** menu (Figure 8–5)

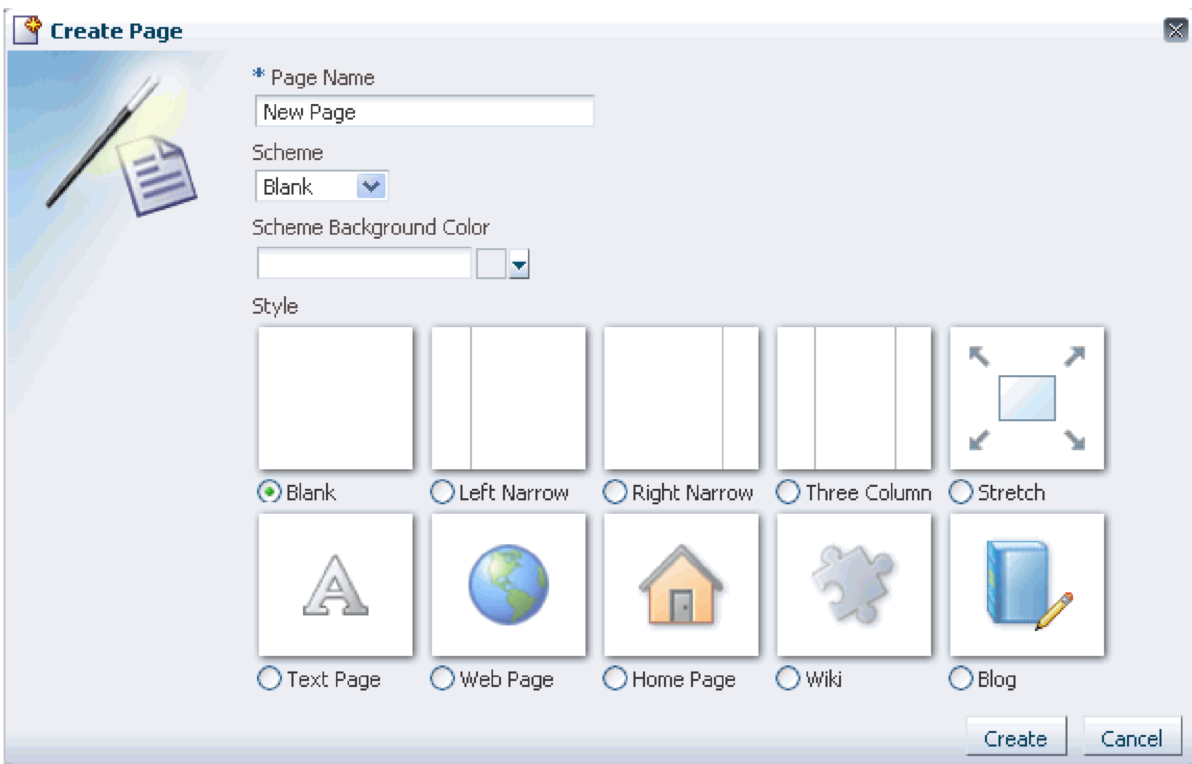
Figure 8–5 Create Page Command on the Page Actions Menu



To create a page:

1. Log in, and go to the location in the application where you want to create a page.
2. From the **Page Actions** menu, select the **Create Page** command to open the Create Page dialog (Figure 8–6).

Figure 8–6 The Create Page Dialog in a WebCenter Spaces Application



Note: If you are creating a page in a personal space, and you set page defaults to create the page and bypass the Create Page dialog, then, after this step, the new page is created and opened in Oracle Composer.

See Also: For information about Oracle Composer, see Section 6.2, "Introducing Oracle Composer."

3. In the **Page Name** field, enter a display name for the new page.

   The name you enter here appears on the page's tab and in the Manage Pages dialog. A value is required for this field, as indicated by the asterisk (*) shown in front of the field label.

4. Optionally, select a page design scheme from the **Scheme** menu.

   The **Scheme** menu provides a selection of background images for the new page. For illustrations of these, see Table 7–1, " Seeded Page Schemes".

   Select **Custom** to provide your own custom background image. When **Custom** is selected, a **Scheme Background Image** field opens in the Create Page dialog.

   Enter the path to the image.

5. Optionally, pick a page background color from the **Scheme Background Color** dropdown list.

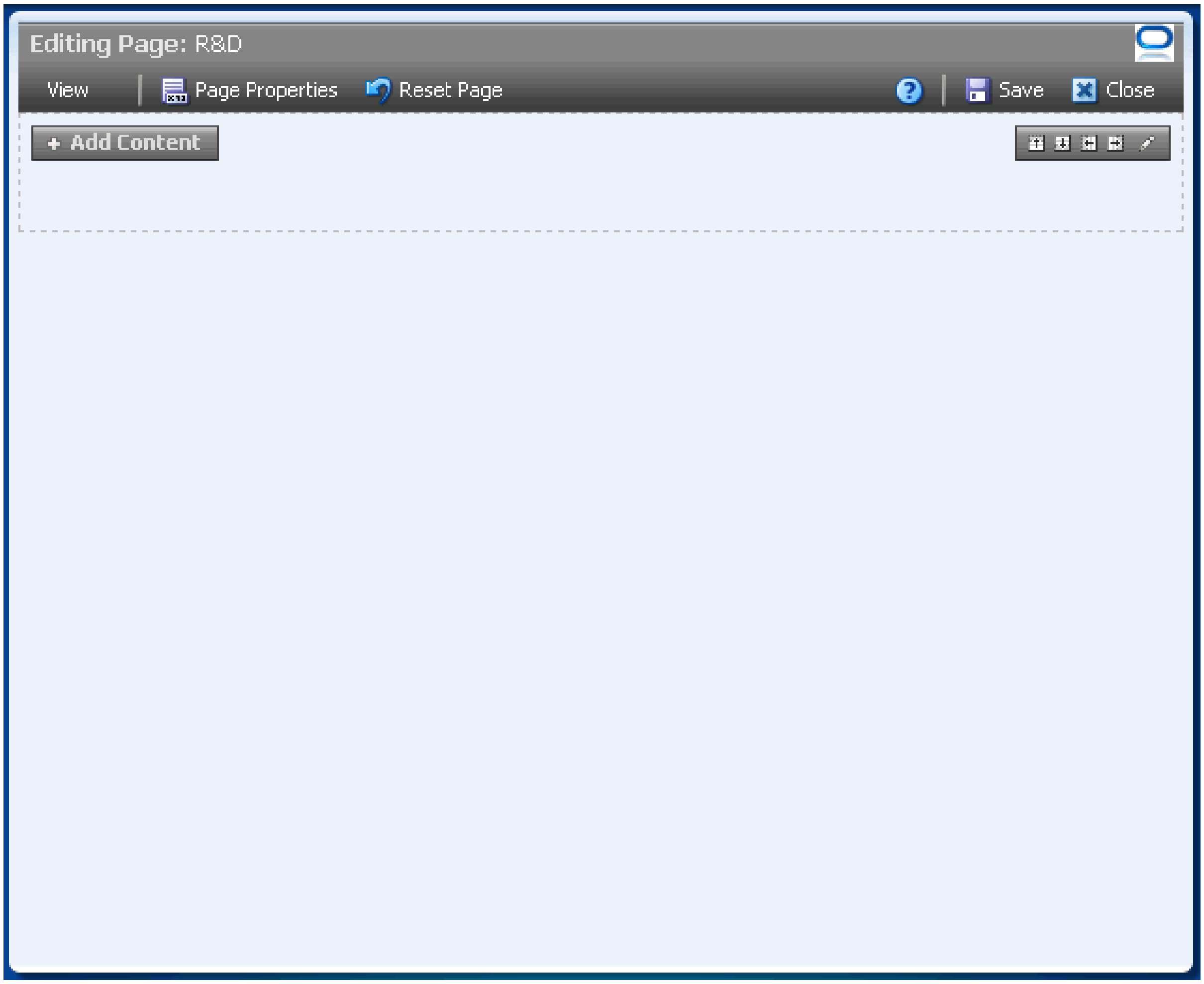
6. Select a page style to define the page structure.

   See Table 7–2 for illustrations and descriptions of out-of-the-box page styles.

7. Click the **Create** button.

   The new page opens in Oracle Composer, the WebCenter page editor, ready for adding content (Figure 8–7).

Figure 8–7 A Page Viewed Through Oracle Composer



For information about adding content, see Chapter 10, "Working with Page Content." For information about Oracle Composer, see Section 6.2, "Introducing Oracle Composer." For information about working with the page layout, look, and feel, see Section 8.4, "Working with Page Layouts, Styles, and Schemes."

Note: When you encounter errors in page edit mode, you can recover by closing your browser and then reopening it and relogging in to the application instance.

8.2 Editing Pages

Edit a page to customize its content or to add or delete content. In edit mode, you can also reset a page to remove all changes made to it since it was first created. This section describes how to enter and exit page edit mode and how to reset a page to its pristine state. It contains the following subsections:

- Section 8.2.1, "Entering and Exiting Page Edit Mode"
- Section 8.2.2, "Removing All Edits, Personalizations, and Customizations from a Page"

Note: If you view a page at the same time that another user is editing the page, you may not immediately see the results of those edits in your session. To reliably see any changes, view the page after the other user has saved.

If you edit a page while another user is editing the same page, a concurrency warning appears toward the top of the page.

See Also: For more information, see Section 8.2.1, "Entering and Exiting Page Edit Mode."

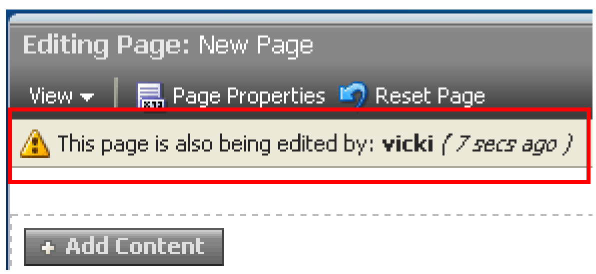
8.2.1 Entering and Exiting Page Edit Mode

In WebCenter Spaces, entering page edit mode—that is, opening Oracle Composer—involves selecting the **Edit Page** command from the menu on a page tab (for more information about Oracle Composer, see Section 2.6, "Initiating Actions from Tabs") or from the **Page Actions** menu.

Exiting, just as easy, involves clicking a **Close** button.

Because users access WebCenter Spaces from the Web, multiple users may attempt to edit the same page at the same time. In such cases, a concurrency warning appears in Oracle Composer that alerts each user to the others (Figure 8–8).

Figure 8–8 A Concurrency Warning in Oracle Composer



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

WebCenter applications do not support single-user concurrency. That is, one user cannot log in to the same WebCenter application at the same time to create multiple, simultaneous sessions.

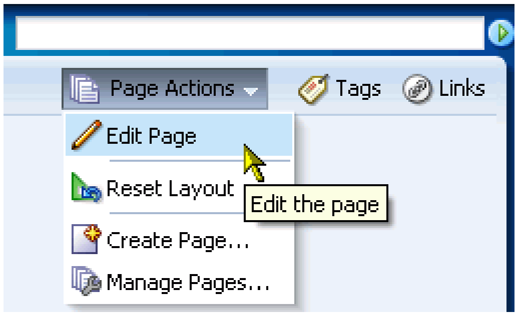
The final state of the page is determined by the last user to save.

This section describes how to open Oracle Composer through the WebCenter Spaces **Page Actions** menu.

To enter and exit Oracle Composer:

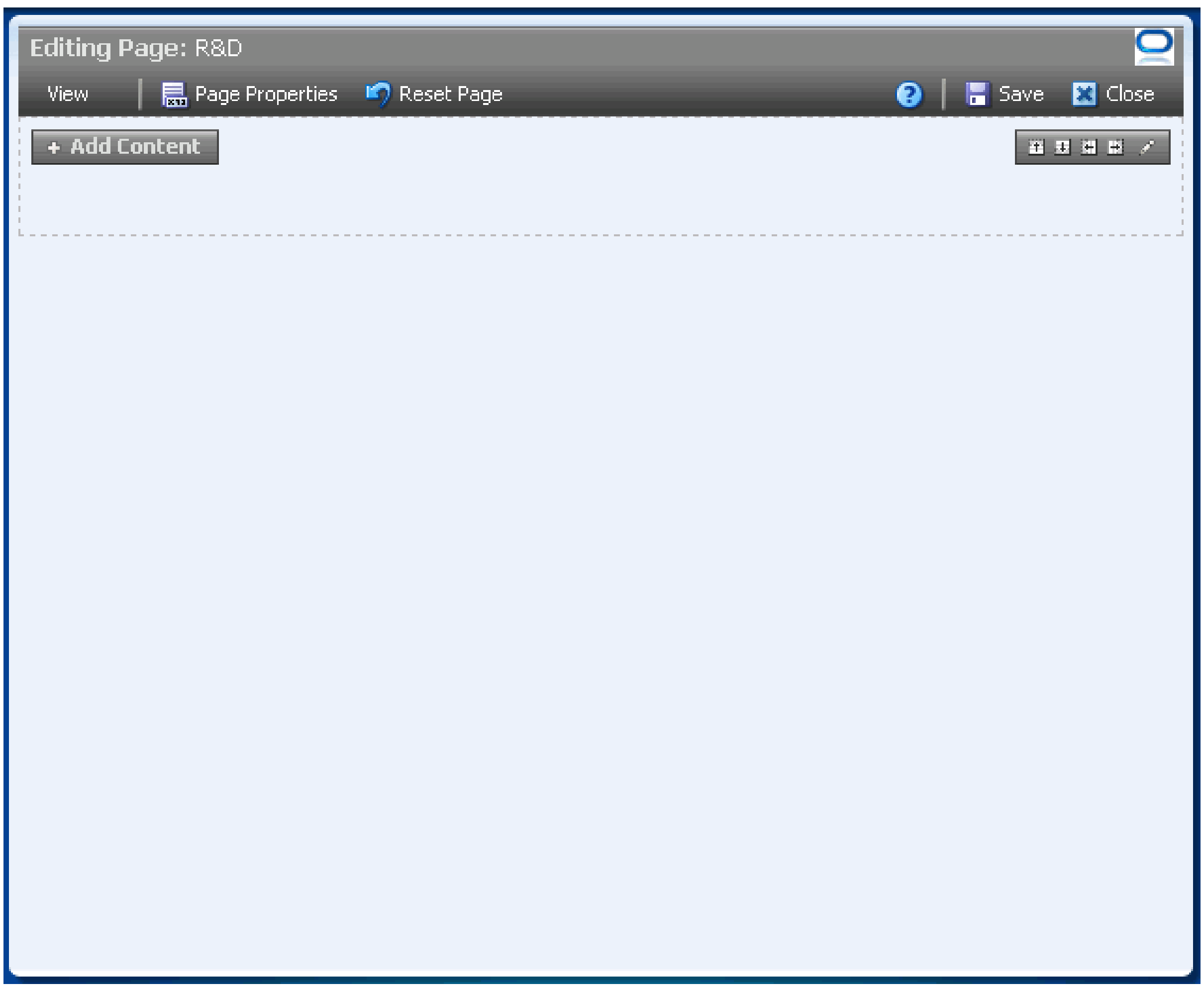
1. Log in, and go to the page you want to edit.
2. From the **Page Actions** menu, select **Edit Page** to open Oracle Composer (Figure 8–9).

Figure 8–9 Edit Page Command on the Page Actions Menu



The page opens in Oracle Composer (Figure 8–10).

Figure 8–10 A Page Viewed Through Oracle Composer



Tip: If the **Edit Page** command is not available on the **Page Actions** menu or the **Page Actions** menu does not appear, it is likely that you do not have sufficient page access privileges. If this is the case, ask your application administrator for the privilege to edit pages.

For more information, see Section 2.8, "Contacting Your Application Administrator."

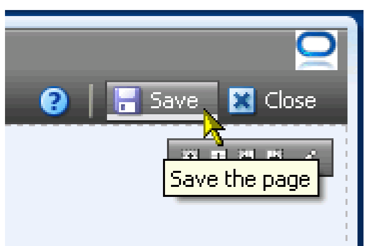
3. Edit the page.

See Also:

- For information about the page editor, Oracle Composer, see Section 6.2, "Introducing Oracle Composer."
- For information about adding content to a page, see Chapter 10, "Working with Page Content."
- For information about page styles and schemes, see Section 8.4.2, "Changing the Page Scheme and Scheme Background Color."
- For information about page layouts, see Chapter 9, "Working with Page Layout Components."

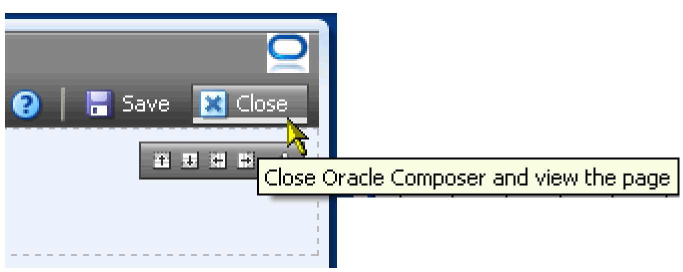
4. Click the **Save** button to save your changes and remain in Oracle Composer (Figure 8–11).

Figure 8–11 The Save Button



5. Optionally, click the **Close** button to exit Oracle Composer (Figure 8–12).

Figure 8–12 The Close Button



8.2.2 Removing All Edits, Personalizations, and Customizations from a Page

Oracle Composer includes a control for resetting a page to the state it was in when it was first created. The **Reset Page** button removes all edits, regardless of when they were made, and restores the page to its original, newly-created state. This is particularly valuable for maintaining pages that users have linked to. Resetting a page enables you to take the page back to its original state without disrupting such connections.

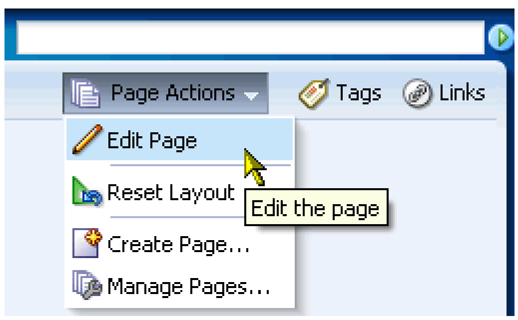
> **See Also:** The **Page Actions** menu provides the **Reset Layout** command for removing just the personalizations you have made to a page. For more information, see Section 4.3, "Removing Your Page Personalizations."

If multiple users are editing a page, and one of them clicks the **Reset Page** button, the changes made by the other users may nonetheless be saved to the reset page. The result depends on the order in which users save their changes. The final state of the page is determined by the last user to save. For more information, see Section 6.2.1, "Accessing Oracle Composer."

To reset a page:

1. Log in, and go to the page you want to reset.
2. From the **Page Actions** menu, select **Edit Page** to open Oracle Composer (Figure 8–13).

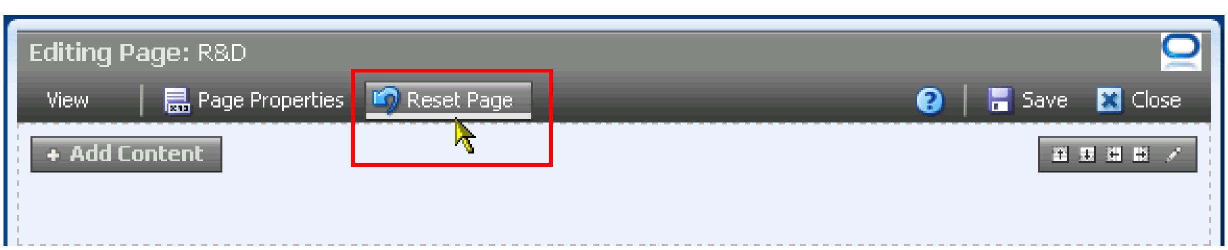
Figure 8–13 Edit Page Command on the Page Actions Menu



> **Tip:** If the **Edit Page** command is not available on the **Page Actions** menu or the **Page Actions** menu does not appear, it is likely that you do not have sufficient page access privileges. If this is the case, ask your application administrator for the privilege to edit pages. See Section 2.8, "Contacting Your Application Administrator."

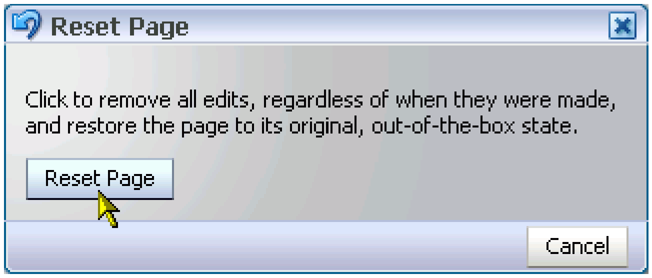
3. Click the **Reset Page** button at the top of Oracle Composer (Figure 8–14).

Figure 8–14 Reset Page Button



4. In the resulting Reset Page dialog, click the **Reset Page** button (Figure 8–15).

Figure 8–15 Reset Page Dialog



All changes made to the page since it was created are removed.

5. Click the **Save** button at the top of the page.

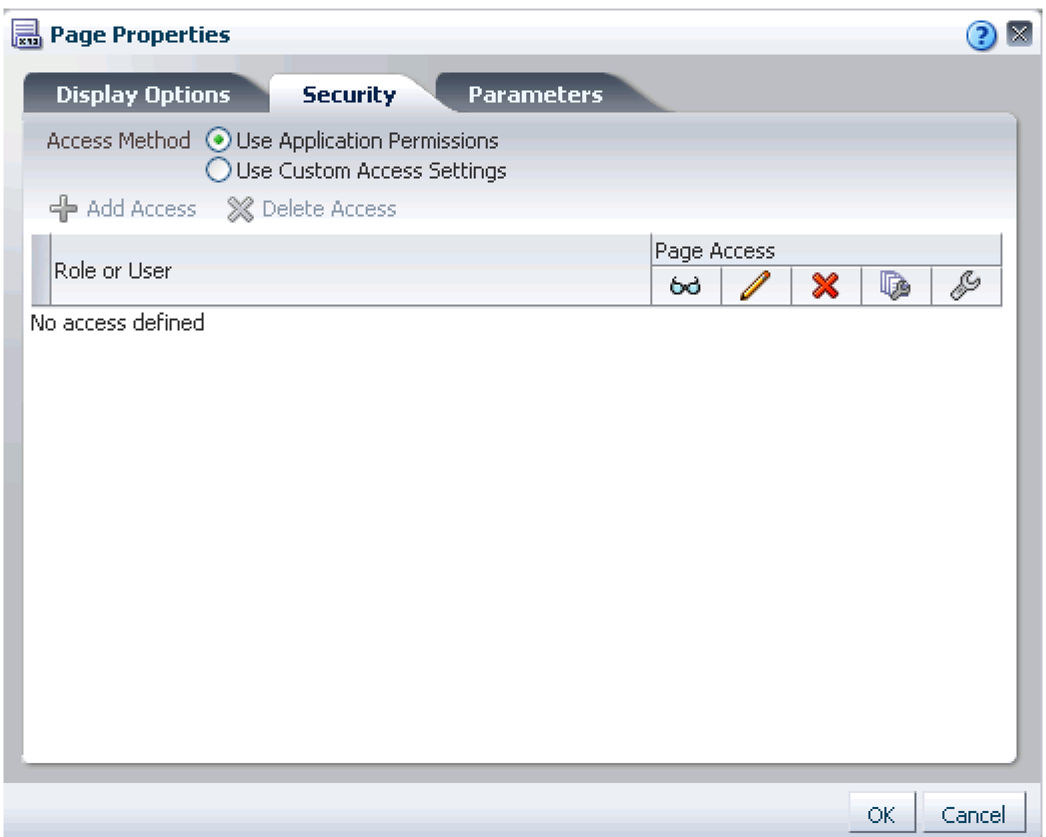
   The page refreshes, now restored to its pristine, out-of-the-box state.

6. Click the **Close** button to exit Oracle Composer.

8.3 Setting Page Access

Page properties include a **Security** tab with controls for specifying who can do what to the current page (Figure 8–16).

Figure 8–16 Security Tab in the Page Properties Dialog of a Page in a Group Space



In WebCenter Spaces, the options that appear on the **Security** tab vary according to whether you are accessing it from a group space page or from a personal space page.

Group space security provides the additional option of inheriting page access permission settings from the application.

Page access setting through the Page Properties dialog equals page access setting though the Manage Pages dialog, which is discussed in Section 7.7, "Setting and Revoking Page Access Permissions." This section describes how to locate page access settings through page properties, and then directs you to the section in the Manage Pages chapter where page access setting is discussed.

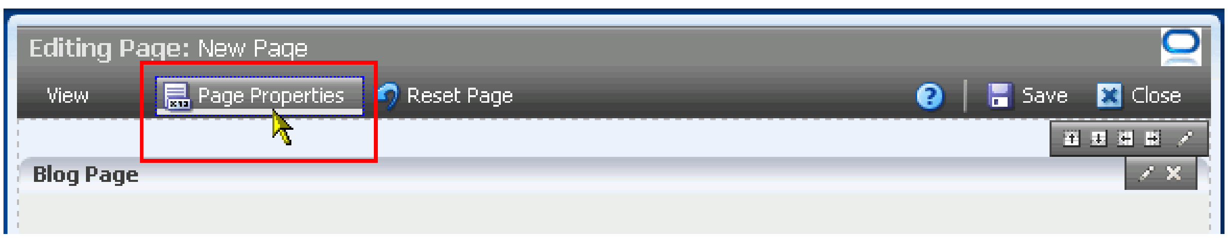
Note: Page access permissions set through the Page Properties dialog in Oracle Composer are committed immediately. Closing Oracle Composer without saving does not discard such changes.

Page access permissions set through the Manage Pages dialog take effect after you click **OK**.

To access the Security tab in the Page Properties dialog:

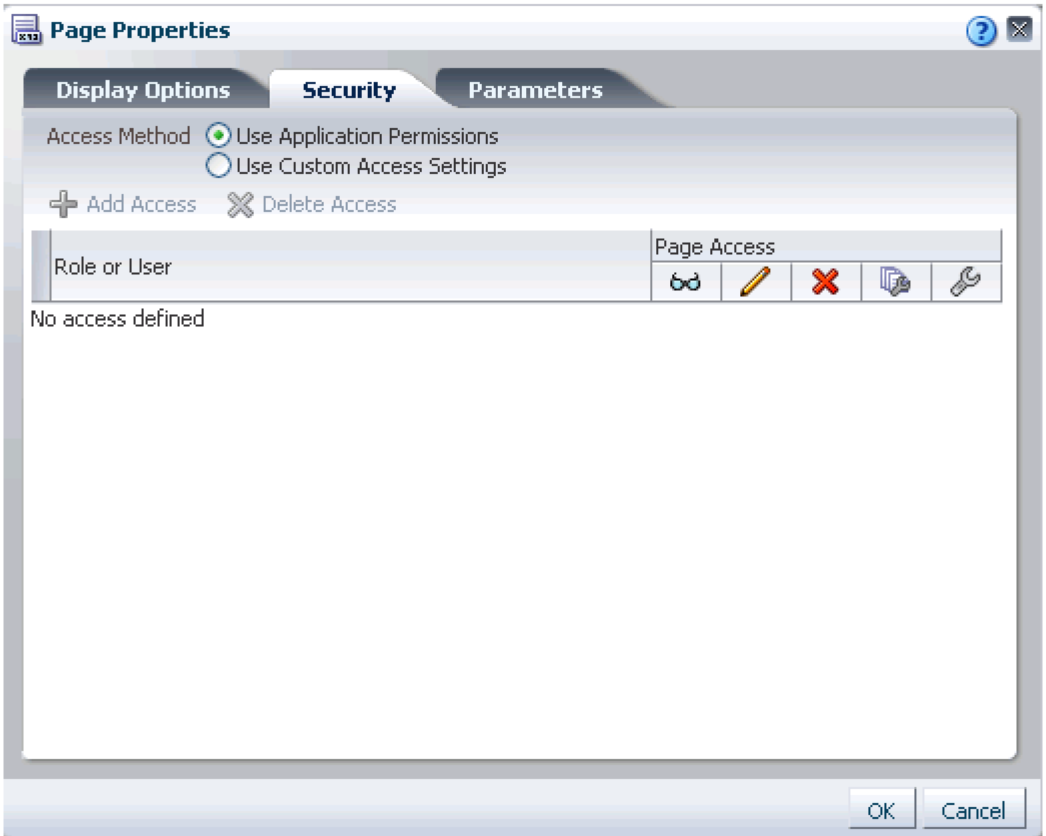
1. Go to the page you want to secure, and open it in Oracle Composer.
2. Click the **Page Properties** button (Figure 8–17).

Figure 8–17 Page Properties Button in Oracle Composer



3. In the resulting Page Properties dialog, click the **Security** tab to bring it forward (Figure 8–18).

Figure 8–18 Security Tab in the Page Properties Dialog



For information about using the page access controls that display on the **Security** tab, See Section 7.7, "Setting and Revoking Page Access Permissions."

Note: When you encounter errors in page edit mode, you can recover by closing your browser and then reopening it and relogging in to the application instance.

8.4 Working with Page Layouts, Styles, and Schemes

Creating the perfect page is a process that may happen over a period of days. You may select a page style or scheme and think better of it later on. With WebCenter Spaces, this presents no problem. It is an easy task to move from one page style or scheme to another. Additionally, you can enhance the style and scheme you selected using the layout components available through the Oracle Composer Catalog.

This section provides information about working with page styles, schemes, and layout components. It contains the following subsections:

- Section 8.4.1, "What You Should Know About Page Layouts, Styles, and Schemes"
- Section 8.4.2, "Changing the Page Scheme and Scheme Background Color"
- Section 8.4.3, "Changing Everyone's Page Layout"

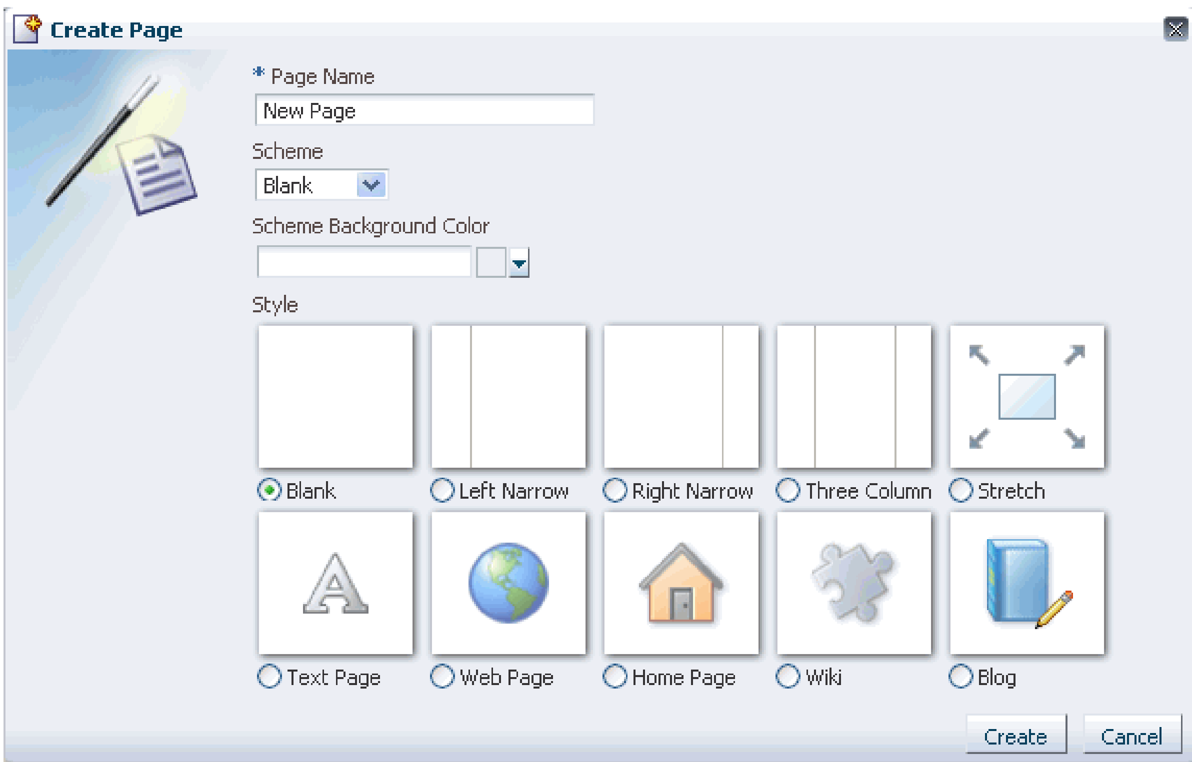
See Also: Advanced users can extend WebCenter Spaces to include custom page layouts, styling, and branding. For more information, see the white papers, "*Extending WebCenter Spaces (11.1.1.2.0)*," and "*Customizing Page Skins at Runtime in WebCenter Spaces (11.1.1.2.0)*," on the Oracle Technology Network: `http://www.oracle.com/technology/products/webcenter/white_papers.html`.

8.4.1 What You Should Know About Page Layouts, Styles, and Schemes

Page styles and schemes provide both a default page structure (that is, the page layout) that describes the areas where you can place content and a background color and image that contribute to a page look and feel. Page layout components provide objects for enhancing the usefulness and appearance of a given page. These include an in-place HTML text editor, images, layout boxes, hyperlinks, and so on.

You can select a page style, scheme, and scheme background color when you create a page. Such selections are available in the Create Page dialog (Figure 8–19).

Figure 8–19 Seeded Page Styles in a WebCenter Spaces Application



Some page styles come prepopulated with a selection of useful task flows. Others include properties that suggest a particular use for the page. For example, the *Web Page* page style includes a configurable property for specifying a URL. You can use this feature to expose external Web content within your WebCenter application.

In many cases, you can switch styles and schemes when you revise a page. You can also start with a blank page and create you own, unique layout, look, and feel.

WebCenter Spaces provides a default selection of schemes and scheme background colors, which you can use to create an instant look and feel. Additionally, you can select a custom scheme, which enables you to provide your own background image.

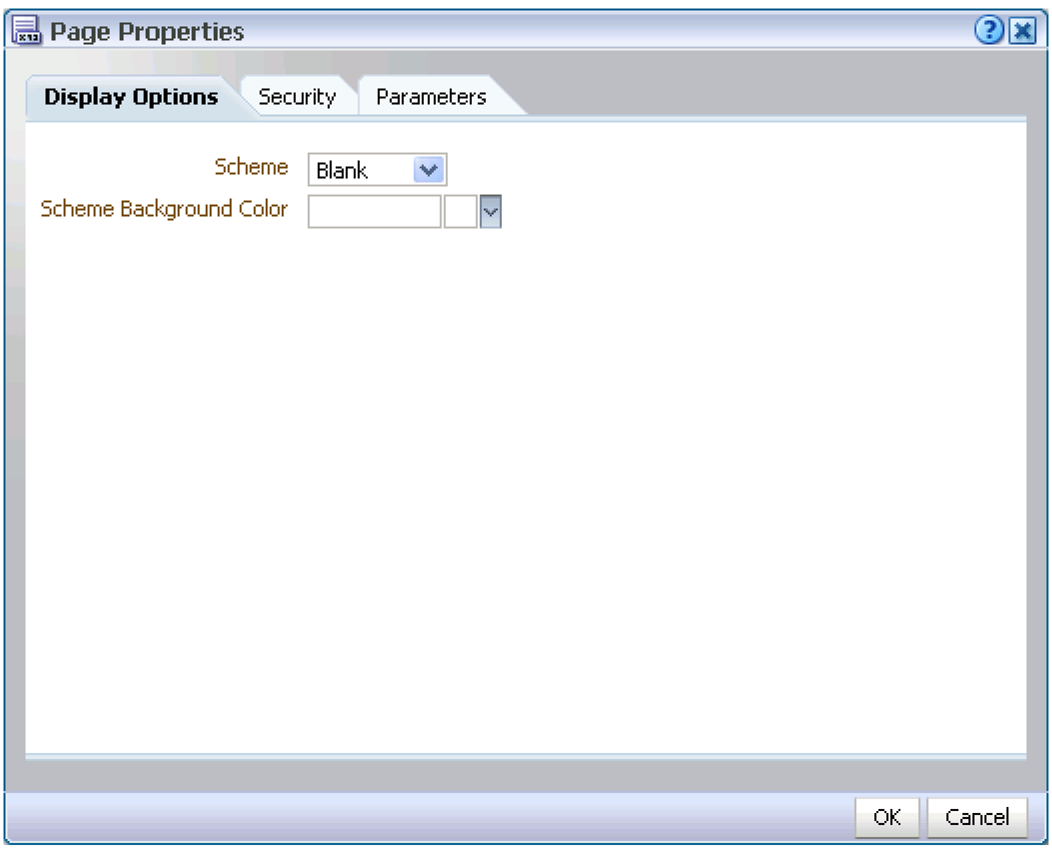
> **See Also:** For illustrations and descriptions of seeded page schemes and styles, see Table 7–1, " Seeded Page Schemes" and Table 7–2, " Seeded Page Styles".

After you create a page, you can enhance its original style and scheme with page layout components. For more information, see Chapter 9, "Working with Page Layout Components."

8.4.2 Changing the Page Scheme and Scheme Background Color

For any page on which you have sufficient permissions, you can change the scheme that was specified when the page was created. The Oracle Composer **Page Properties** dialog includes a Display Options tab, where properties related to the page scheme and scheme background color appear (Figure 8–20).

Figure 8–20 Display Options Tab in the Page Properties Dialog (WebCenter Spaces)



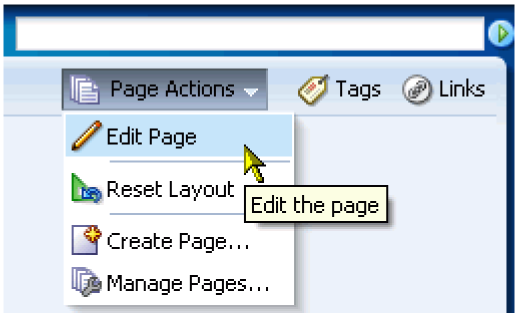
In WebCenter Spaces, a scheme defines the background image for a given page. Choose from preseeded background images, or select **Custom**, and provide your own custom image. Scheme background color provides a base color that covers the full width and length of the page.

This section describes how to change a page's background color and image.

To change a page background color and image in a WebCenter Spaces application:

1. Log in, and go to the page where you want to change page schemes.
2. Select **Edit Page** from the **Page Actions** menu (Figure 8–21).

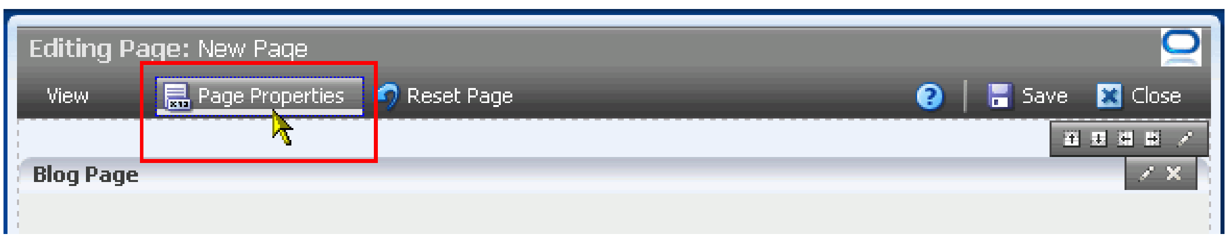
Figure 8–21 Edit Page Command on the Page Actions Menu



The page opens in Oracle Composer.

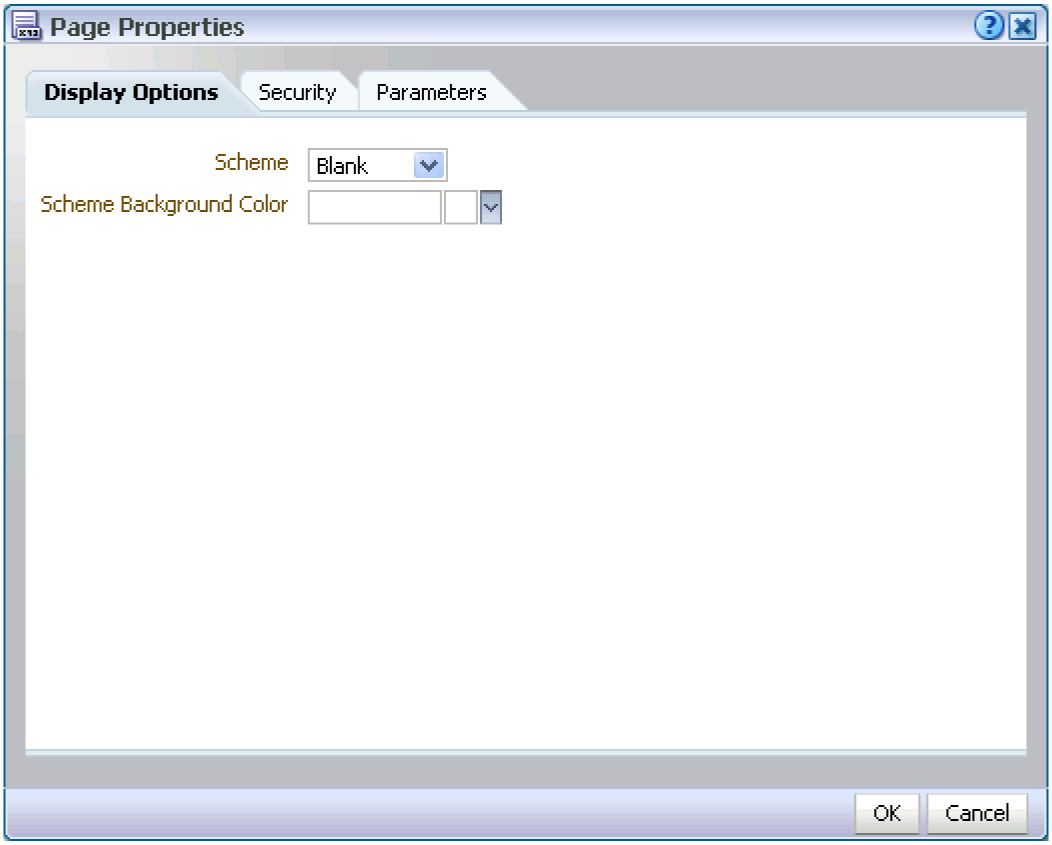
3. In Oracle Composer, click the Page Properties button (Figure 8–22).

Figure 8–22 Page Properties Button in Oracle Composer



4. If necessary, in the Page Properties dialog click the **Display Options** tab to bring it forward (Figure 8–23).

Figure 8–23 Display Options Tab in the Page Properties Dialog (WebCenter Spaces)

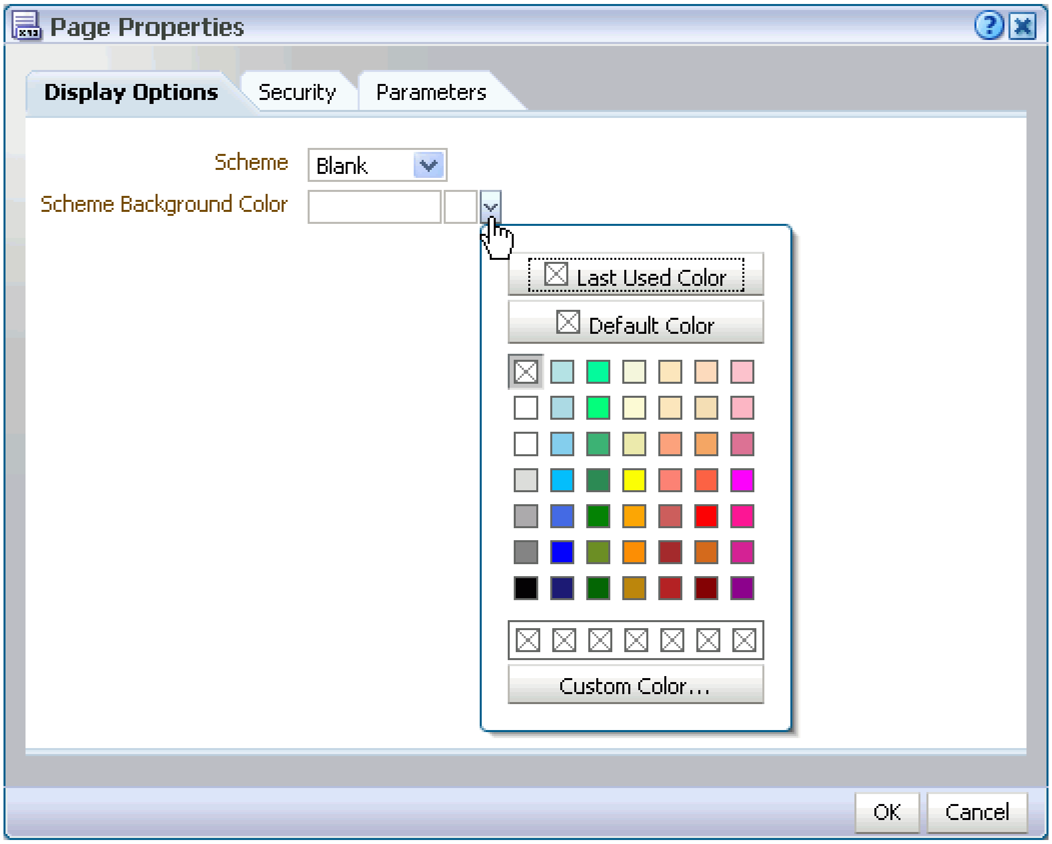


From the **Scheme** pick list, select a page scheme.

For a list and illustrations of out-of-the-box page schemes in WebCenter Spaces, see Table 7–1, " Seeded Page Schemes".

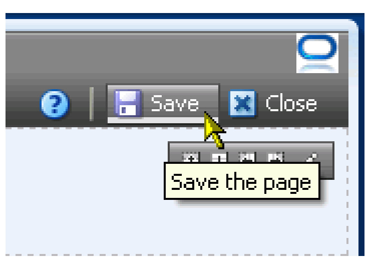
5. Select a page background color from the **Scheme Background Color** pick list (Figure 8–24).

Figure 8–24 Scheme Background Color Pick List



6. Click **OK** to apply your changes and close the dialog.
7. In Oracle Composer, click the **Save** button to save your changes (Figure 8–25)

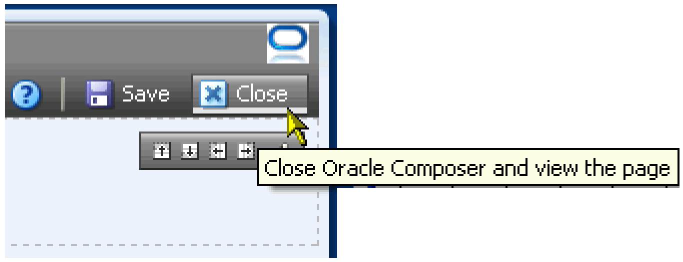
Figure 8–25 The Save Button



The page refreshes, displaying the new background color and image.

8. Click the **Close** button to exit Oracle Composer (Figure 8–26).

Figure 8–26 The Close Button



8.4.3 Changing Everyone's Page Layout

Many of the page styles presented in the Create Page dialog can be switched to a different page style at application runtime. Other page styles expose external content, notably the Web Page page style, and consequently do not support mid-stream layout changes.

> **See Also:** Table 7–2, " Seeded Page Styles" illustrates WebCenter default page layouts and indicates which can be switched to a different layout.

Depending on how your application is configured, you may be able to switch page layouts in page view mode and in page edit mode. Switching a page layout in page view mode is a personalization that affects only your view of a page (for more information, see Section 4.2.2, "Changing Your Page Layout"). Switching page layout in page edit mode is a customization. This section describes how to switch a page layout in page edit mode. It includes the following subsections:

- Section 8.4.3.1, "Switching Everyone's Page Layout Using Change Layout"
- Section 8.4.3.2, "Switching Everyone's Page Layout Using Add Box Icons"

> **See Also:** For information about personalization and customization, see Section 10.2, "Customizing and Personalizing Page Content."

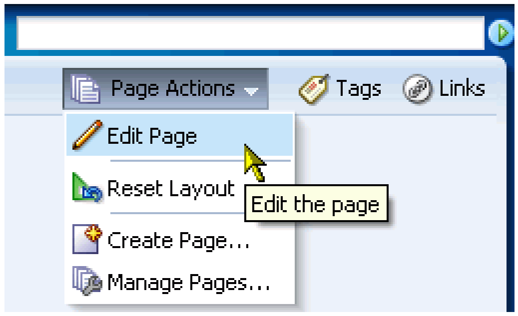
Note: When you encounter errors in page edit mode, you can recover by closing your browser and then reopening it and relogging in to the application instance.

8.4.3.1 Switching Everyone's Page Layout Using Change Layout

To switch from one page layout to another:

1. Log in, and go to the page where you want to revise a page layout.
2. From the **Page Actions** menu, select **Edit Page** to open Oracle Composer (Figure 8–27).

Figure 8–27 Edit Page Command on the Page Actions Menu

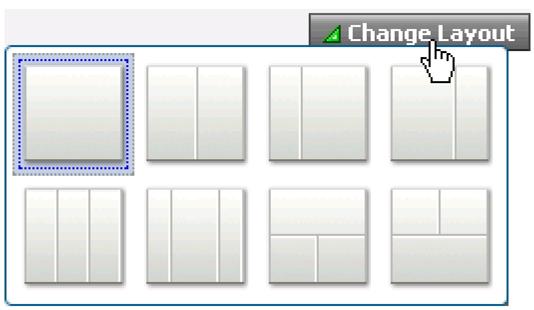


> **Tip:** If the **Edit Page** command is not available on the **Page Actions** menu or the **Page Actions** menu does not appear, it is likely that you do not have sufficient page access privileges. If this is the case, ask your application administrator for the privilege to edit pages. See Section 2.8, "Contacting Your Application Administrator."

3. Scroll to the top-right of the page area, and click the **Change Layout** link.

   The layout picker opens (Figure 8–28).

Figure 8–28 The Layout Picker



4. Click a layout to apply it to the currently displayed page.

   The page refreshes instantly, now arranged according to the selected layout.
5. In Oracle Composer, click **Save** and then **Close**.

> **See Also:** For information about changing a page layout in only your view of a page, see Section 4.2.2, "Changing Your Page Layout."
>
> For information about making the Change Layout link available in page view mode, see Section 9.3.9.3, "Working with Change Layout/Layout Customizable Properties."

8.4.3.2 Switching Everyone's Page Layout Using Add Box Icons

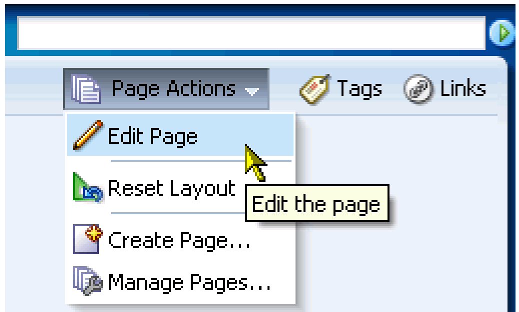
You can add additional content regions to a page by splitting existing layout Boxes. This section describes how.

To split a Box:

1. Log in, and go to the page where you want to revise a page layout.

2. From the **Page Actions** menu, select **Edit Page** to open Oracle Composer (Figure 8–29).

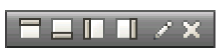
Figure 8–29 Edit Page Command on the Page Actions Menu



> **Tip:** If the **Edit Page** command is not available on the **Page Actions** menu or the **Page Actions** menu does not appear, it is likely that you do not have sufficient page access privileges. If this is the case, ask your application administrator for the privilege to edit pages. See Section 2.8, "Contacting Your Application Administrator."

3. Go to the layout Box you want to split, and click the **Add Box** icon that splits the Box in the manner you prefer (Figure 8–30).

Figure 8–30 Add Box Icons



Choose from:

- Add Box Above
- Add Box Below
- Add Box Left
- Add Box Right

4. In Oracle Composer, click **Save** and then **Close**.

> **See Also:** For more information, see Section 9.1.1, "The Box Layout Component."

8.5 Using Pretty URLs for WebCenter Spaces Pages

A concise URL that shields users from the complexity of the real web address can be much more presentable and somewhat less daunting to users interested in navigating to your page. You can shield your users from complex application page URLs with *pretty URLs*.

Pretty URLs are much shorter versions of the URL you might copy from your browser address bar. With pretty URLs, you can navigate to pages directly, without having to know the internal URL. Additionally, pretty URLs enable you to send simpler, shorter URLs to your colleagues.

Table 8–1 lists and describes the syntax for the pretty URLs you can formulate for easy access to public and non-public pages.

Table 8–1 Syntax of Pretty URLs

Use Case	Pretty URL Syntax
Take user to the home page of his or her personal space	`http://`*`host:port`*`/webcenter/spaces/home`
Take user to the personal page he or she last accessed	`http://`*`host:port`*`/webcenter` `http://`*`host:port`*`/webcenter/spaces`
Take user to a specific page in a personal space	`http://`*`host:port`*`/webcenter/spaces/page/`*`escapedPageDisplayName`*
Take user to the specified group space, where the last-accessed page is displayed	`http://`*`host:port`*`/webcenter/spaces/`*`GroupSpaceName`*
Take user to the first page of a group space	`http://`*`host:port`*`/webcenter/spaces/`*`GroupSpaceName`*`/home`
Take user to a specific page in a group space	`http://`*`host:port`*`/webcenter/spaces/`*`GroupSpaceName`*`/page/`*`escapedPageDisplayName`*

Note: In Table 8–1, wherever the variable *`GroupSpaceName`* is indicated, use the group space name in lieu of the group space display name. The group space name is the value entered for **Group Space Name** on the **General** tab of a group space **Settings** page. The group space display name appears on the group space top-level tab.

For example, when you create a group space with the name *My Space*, the URL to this group space ends with `My_Space`.

Wherever the variable `escapedPageDisplayName` is indicated, use an escaped version of the page display name.

For example, when you create a page with the name *My Page*, the URL to this page ends with `My+Page`.

In addition to providing pretty URLs, you can also pass parameter values through your application URLs. For one thing, this enables you to steer different users to the same page, which in turn provides tailor-made information depending on the URL you provided. For more information, see Section 11.5, "Passing Parameter Values Through the Page URL."

8.6 Deleting Pages

You have two options for deleting WebCenter Spaces pages:

- Select the **Delete Page** command on the page tab menu (for more information, see Section 2.6, "Initiating Actions from Tabs").
- Select the **Delete Page** command on the **Actions** menu in the Manage Pages dialog (for more information, see Section 7.10, "Deleting a Page Through the Manage Pages Dialog").

For information about deleting a group space, see Section 14.7, "Deleting a Group Space." You cannot delete a personal space. Personal spaces are removed automatically when a user is removed from the identity store that provides users to your WebCenter Spaces application.

9

Working with Page Layout Components

You can use page layout components to add more content layout areas, images, links, and text, and expose external Web pages within the context of your WebCenter application. This chapter describes WebCenter default layout components, steps you through adding them to a page, and provides information about each component's properties. It contains the following subsections:

- Section 9.1, "What You Should Know About Page Layout Components"
- Section 9.2, "Adding a Layout Component to a Page"
- Section 9.3, "Working with Layout Component Properties"
- Section 9.4, "Deleting Layout Components"

Audience

This chapter is intended for users who want to create and edit pages, revise page layouts, and delete pages. By default, every authenticated user can perform the actions described in this chapter in their own personal spaces. Note, however, that your application administrator may alter such default access privileges.

Sufficient access privileges must be assigned—through the grant of privileges or the assignment of a role—to create or edit pages in group spaces and custom WebCenter applications.

Much of the information in this chapter also applies to custom WebCenter applications, though it is written with WebCenter Spaces users in mind. (For information about the Page service in custom WebCenter applications, see the chapter "Enabling the Runtime Creation and Management of Pages" in *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter*.)

Your application administrator has the authority to expose or hide a particular service's task flows. Tasks discussed in this chapter are not available to you if the associated task flow is hidden.

> **See Also:** For information about WebCenter Spaces seeded user roles, see the "Default Policy Store Permissions" section in the *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter*.

9.1 What You Should Know About Page Layout Components

Oracle Composer provides the following useful and versatile layout components:

- Section 9.1.1, "The Box Layout Component"
- Section 9.1.2, "The HTML Markup Layout Component"

- Section 9.1.3, "The Hyperlink Layout Component"
- Section 9.1.4, "The Image Layout Component"
- Section 9.1.5, "The Movable Box Layout Component"
- Section 9.1.6, "The Text Layout Component"
- Section 9.1.7, "The Web Page Layout Component"
- Section 9.1.8, "Hidden Layout Components"

9.1.1 The Box Layout Component

The Box layout component is a container that enables the placement of content on a WebCenter application page. Boxes are the landing place for the Movable Boxes, task flows, and portlets that you add to a page.

In Oracle Composer, a Box is rendered as rectangle comprised of dashed lines, an **Add Content** button, and **Add Box**, **Edit**, and **Delete** icons (Figure 9–1).

Figure 9–1 A Box Layout Component on a Page in Edit Mode

You can place content within a Box, and you can place one or more Boxes within a Box. You can configure Box properties to display content horizontally or vertically. You can specify the display of a scrollbar or set the Box to devote all its area to a single task flow. You can use Box controls to add boxes above, below, or to either side of a given Box.

Note: When you use Box controls to split a Box, the rearrange capability is disabled in the Component Properties dialog on the **Child Components** tab. You can still rearrange content on such boxes by dragging and dropping on the page itself. For information about the Child Components tab, see Section 10.4.6, "Working with Child Components."

The Box layout component provides access to style properties for setting font, color, and background on a single component instance. Style property values override such values set on the Box component's container, on the page, and on the application. For information about layout component Style properties, see Section 10.4.7, "Working with Style and Content Style Properties."

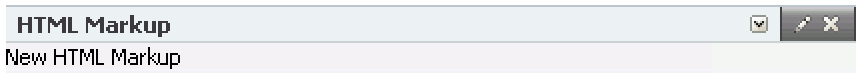
See Also: For information about properties specific to the Box layout component, see Section 9.3.2, "Working with Box Layout Component Properties."

For information about adding layout components to a page, see Section 9.2, "Adding a Layout Component to a Page."

9.1.2 The HTML Markup Layout Component

The HTML Markup layout component is a simple text editor that enables the entry of text, HTML markup, JavaScript, and Expression Language (EL) expressions (Figure 9–2).

Figure 9–2 An HTML Markup Layout Component



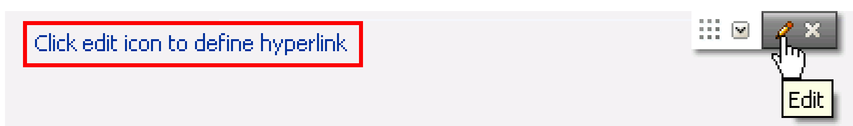
Enter content through the component's properties.

> **See Also:** For information about HTML Markup layout component properties, see Section 9.3.3, "Working with HTML Markup Layout Component Properties."
>
> For information about layout component Style properties, see Section 10.4.7, "Working with Style and Content Style Properties." For information about adding layout components to a page, see Section 9.2, "Adding a Layout Component to a Page."
>
> For an example of how to use the HTML Markup layout component to embed video, music, slides, or Google Gadgets, see Section 10.1.6, "Embedding Video, Music, Slides, and Other Types of Content."

9.1.3 The Hyperlink Layout Component

A Hyperlink layout component (Figure 9–3) is comprised of two elements: a link title and a link destination.

Figure 9–3 A Hyperlink Layout Component



The title provides the link text, and the destination provides the link target, that is, the URL to the target destination. Enter the link title and destination through Hyperlink properties. For information about Hyperlink properties, see Section 9.3.4, "Working with Hyperlink Layout Component Properties."

You can use internal and external link targets for a Hyperlink. For an internal target, you can use a relative directory path. An easy way to obtain the relative directory path of a WebCenter Spaces page is to navigate to the target page and go through the motions of adding it as a Favorite. By default, the Add Favorite dialog provides the relative URL of the current page. Simply copy this information, and use it to define the Hyperlink target.

> **See Also:** For information about adding a Favorite to WebCenter Spaces, see Chapter 5, "Creating and Managing Favorites."

The Hyperlink layout component provides access to style properties for setting font, color, and background properties on a single component instance. Style property values override such values set on the Hyperlink component's container, on the page, and on the application.

> **See Also:** For information about layout component Style properties, see Section 10.4.7, "Working with Style and Content Style Properties."
>
> For information about adding layout components to a page, see Section 9.2, "Adding a Layout Component to a Page."

9.1.4 The Image Layout Component

Images can be added from two places in the Oracle Composer **Catalog** panel:

- Image layout components from the **Layout** folder
- Image files from **Documents** folder

Unlike images from the **Documents** folder, Images from the **Layout** folder provide controls for associating a link target with the image. Additionally, while image files can be discovered in a search, Image layout components cannot, preventing a return of irrelevant search results.

> **See Also:** For more information about images from the **Documents** folder, see Section 10.1.3, "Adding Documents to a Page."

Use the Image layout component (Figure 9–4) to promote company branding or simply to illustrate your application pages. Use any Web-compatible image from any publicly-accessible location.

Figure 9–4 Undefined Image Layout Component

The Image layout component includes properties for defining not only the image, but also an optional target URL and short- (`ALT` text) and long-description (external HTML file) text to enhance application accessibility. Target frame options are provided to enable you to define open behavior for the Image's link target. For information about properties specific to the Image layout component, see Section 9.3.5, "Working with Image Layout Component Properties."

The Image layout component provides access to style properties for setting font, color, and background properties on a single component instance. Style property values override such values set on the Image component's container, on the page, and on the application.

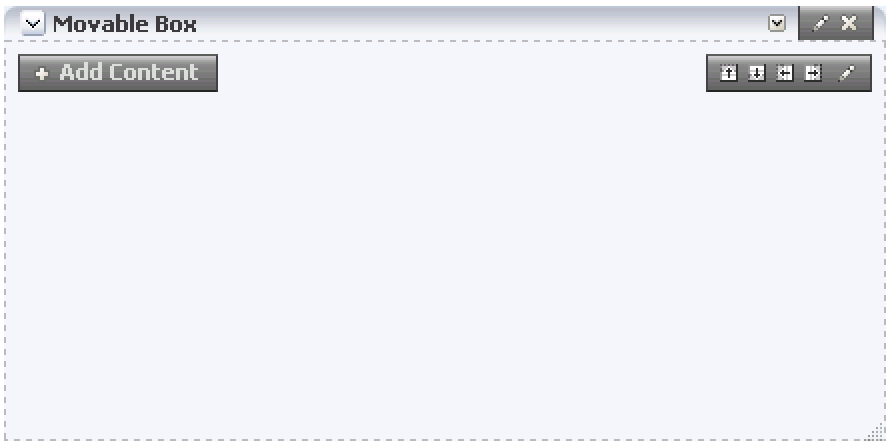
See Also: For information about layout component Style properties, see Section 10.4.7, "Working with Style and Content Style Properties."

For information about adding layout components to a page, see Section 9.2, "Adding a Layout Component to a Page."

9.1.5 The Movable Box Layout Component

The Movable Box layout component (Figure 9–5) is like the Box layout component in that it is a container for page content; but it differs from a Box through its capacity to be dragged—content and all—to new positions on a page and to be resized in page view mode.

Figure 9–5 Movable Box Layout Component



As the name implies, when you personalize or customize a page you can move a Movable Box along with all of its content. In contrast, you can move the content of a Box layout component, but you cannot move the Box itself. Another difference lies with the properties associated with each box type. For example, although a Box layout component provides controls for orienting box content horizontally or vertically, such properties are not provided with the Movable Box.

You can display a Movable Box with a header and borders. You can also turn these off through component properties (for more information, see Section 9.3.6, "Working with Movable Box Layout Component Properties"). When you expose the header, you can also select to hide or show additional actions on the Movable Box. These include move up or down, collapse and restore, remove, and resize.

The Movable Box layout component provides access to style properties for setting font, color, and background properties on a single component instance. Style property values override such values set on the Movable Box component's container, on the page, and on the application.

Tip: Avoid adding a portlet to a Movable Box layout component. Adding a portlet to a Movable Box creates an unnecessary and potentially error-prone redundancy.

For more information, see Section 9.1.5, "The Movable Box Layout Component."

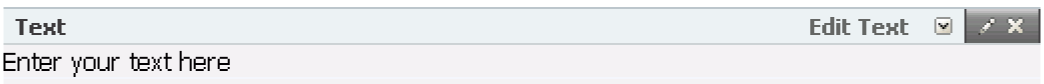
See Also: For information about layout component style properties, see Section 10.4.7, "Working with Style and Content Style Properties."

For information about adding layout components to a page, see Section 9.2, "Adding a Layout Component to a Page."

9.1.6 The Text Layout Component

The Text layout component provides a convenient way to add static display text and HTML to a WebCenter Spaces page (Figure 9–6).

Figure 9–6 A Text Layout Component



The Text layout component provides a Rich Text Editor (RTE), which you can use to enter text, apply text styles, and add links and images (Figure 9–7).

Figure 9–7 Text Layout Component's Rich Text Editor

Note: The RTE ignores the following types of tags 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>

RTE controls are shown in Oracle Composer and are hidden in page view mode.

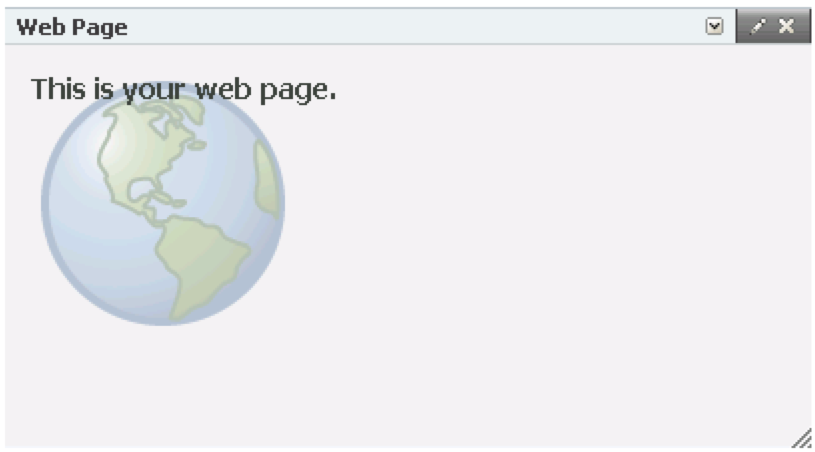
The Text layout component provides access to style properties for setting font, color, and background properties on a single component instance. Style property values override such values set on the Text component's container, on the page, and on the application.

> **See Also:** For information about layout component style properties, see Section 10.4.7, "Working with Style and Content Style Properties."
>
> For information about properties specific to the Text layout component, see Section 9.3.7, "Working with Text Layout Component Properties."
>
> For information about using RTE controls, see Table 18–10, " Rich Text Editor Controls".
>
> For information about adding layout components to a page, see Section 9.2, "Adding a Layout Component to a Page."

9.1.7 The Web Page Layout Component

The Web Page layout component provides a means of displaying a window onto other web pages within the context of a WebCenter application page (Figure 9–8).

Figure 9–8 An Undefined Web Page Layout Component



Use the Web Page layout component to expose web content within the context of a WebCenter application page. All of the controls displayed in the web page are functional, enabling you to, for example, control video volume, edit the wiki, or post an entry to the blog.

You can use internal and external link targets for a Web Page. For an internal target, you can use a relative directory path. In WebCenter Spaces, an easy way to obtain the relative directory path of an application page is to navigate to the target page and go through the motions of adding it as a Favorite. By default, the Add Favorite dialog provides the relative URL of the current page. Simply copy this information, and use it to define the Web Page target.

> **See Also:** For information about adding a Favorite to WebCenter Spaces, see Chapter 5, "Creating and Managing Favorites."

The Web Page layout component provides a variation on the Web Page page style offered through the Create Page dialog. The Web Page page style is useful for offering the full external Web page experience. In contrast, the Web Page layout component is useful for including Web page content along with other content types on an application page.

The Web Page layout component provides access to style properties for setting font, color, and background properties on a single component instance. Use the **Width** and **Height Style** properties to determine the size of the Web Page display area. Style property values override such values set on the Web Page component's container, on the page, and on the application.

> **See Also:** For information about layout component style properties, see Section 10.4.7, "Working with Style and Content Style Properties."
>
> For information about properties specific to the Web Page layout component, see Section 9.3.8, "Working with Web Page Layout Component Properties."
>
> For information about adding layout components to a page, see Section 9.2, "Adding a Layout Component to a Page."

9.1.8 Hidden Layout Components

Some page layout components are not exposed for use in the Oracle Composer Catalog. They are nonetheless on view and configurable when you edit a page and set Oracle Composer to Source view.

Such components include:

- **panelStretchLayout—**Provides a means of arranging content in defined areas on a page. Useful useful for enabling content to stretch when the browser is resized.
- **panelGroupLayout—**Provides a means of arranging a series of child components vertically or horizontally (no wrapping), or consecutively (wrapping). The `Layout` property determines the arrangement of the child components.
- **Layout Customizable/Change Layout**

  Provides a means of switching the current page style to another style. Not all page styles can be switched at runtime. For information about seeded page styles that can and cannot be switched, see Table 7–2.
- **spacer—**Provides a means of incorporating some blank space in pages so that the page appears less cluttered than it would if all the components were presented immediately next to each other or immediately below each other.

> **See Also:** For information about setting component properties, see Section 9.3, "Working with Layout Component Properties."
>
> For information about hidden-component properties, see Section 9.3.9, "Working with Hidden Layout Component Properties."

9.2 Adding a Layout Component to a Page

The process of adding a layout component to a page is the same for every layout component. This section describes how.

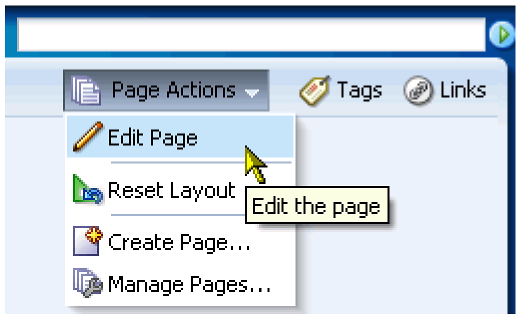
> **Note:** When you add a component to a page, you must wait for the application status indicator to finish processing before taking additional action.

Tip: Although you cannot add hidden layout components to a page—they are provided with the page infrastructure—you can configure hidden layout component properties. For more information, see Section 9.3.9, "Working with Hidden Layout Component Properties."

To add a layout component to a page:

1. Log in, and go to the page where you want to add a layout component.
2. In WebCenter Spaces, select **Edit Page** from the **Page Actions** menu to open Oracle Composer (Figure 9–9).

Figure 9–9 Edit Page Command on the Page Actions Menu

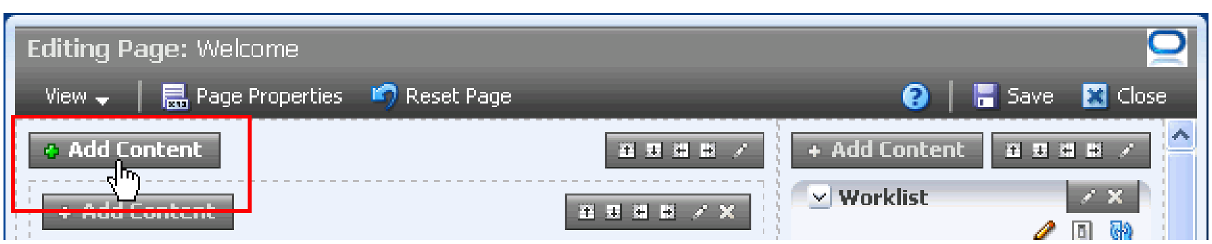


Tip: If the **Edit Page** command is not available on the **Page Actions** menu or the **Page Actions** menu does not appear, it is likely that you do not have sufficient page access privileges. If this is the case, ask your application administrator for the privilege to edit pages.

For more information, see Section 2.8, "Contacting Your Application Administrator."

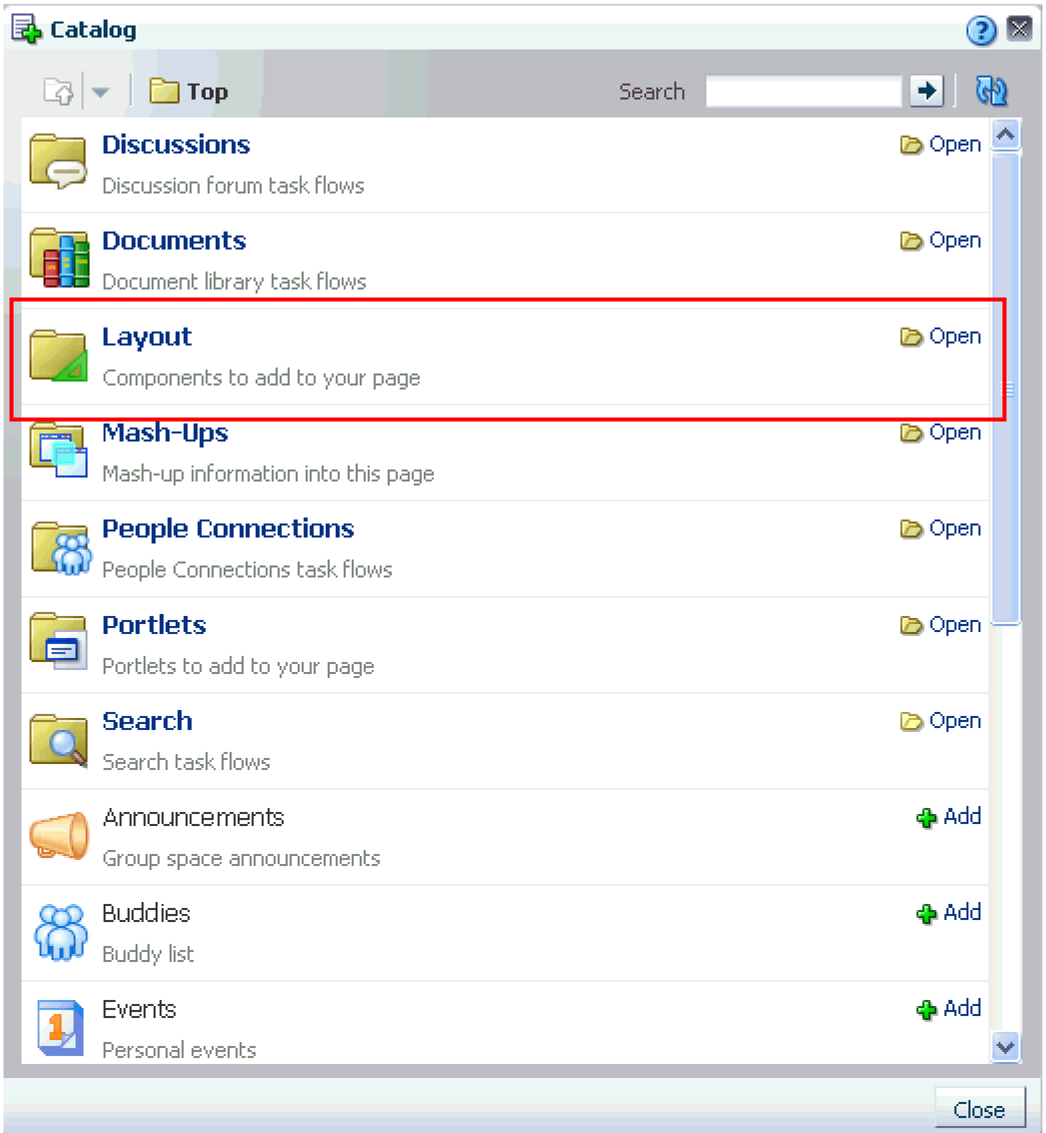
3. Click the **Add Content** button in the content area where you want to place the layout component (Figure 9–10).

Figure 9–10 The Add Content Button in Oracle Composer



The Oracle Composer Catalog opens (Figure 9–11).

Figure 9–11 Oracle Composer Catalog



Note: In WebCenter Spaces, the content of the Catalog varies according to the services that are integrated with the application and the location from which the Catalog was opened. For example, the components that appear in the Catalog when you open it from a personal space differ from those that appear when you open it from a group space.

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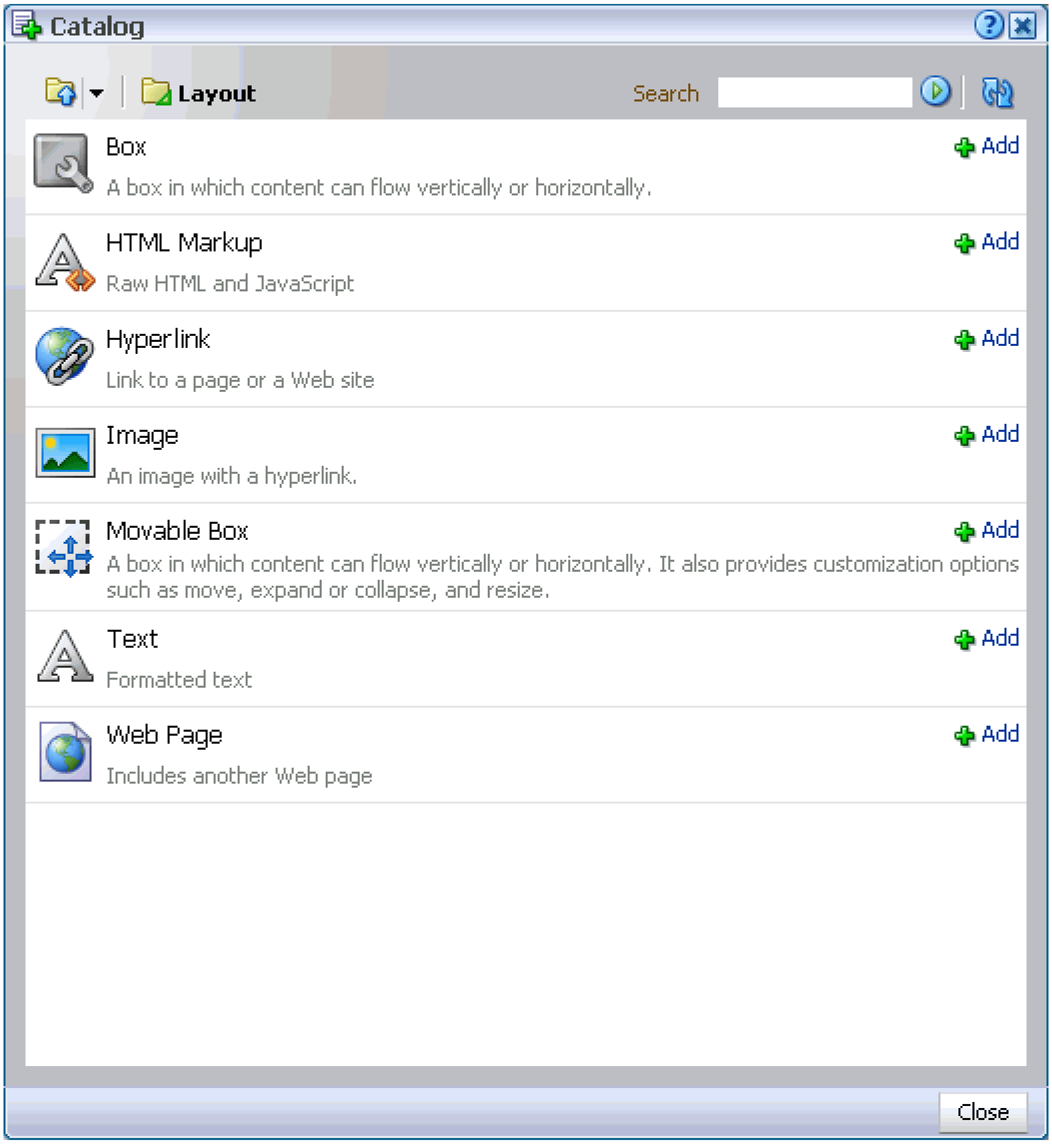
4. In WebCenter Spaces, click the **Open** link next to **Layout** (Figure 9–11) to display a selection of layout components (Figure 9–12).

   In custom WebCenter applications, click the **Open** link next to **ADF Faces Components** to display a selection of layout components.

Figure 9–12 Layout Components in the Oracle Composer Catalog



5. Click the **Add** link next to the component you want to add to the page.

   By default, new components are added to the top of their content areas.

6. Click the **Close** button to exit the Catalog.
7. Optionally, drag-and-drop the newly-added component to the desired position on the page.

   As you move a component around, a dark box marks the target drop location.

8. In Oracle Composer, click the **Save** button to save your changes.
9. Optionally, click the **Close** button to exit Oracle Composer.

9.3 Working with Layout Component Properties

Each layout component has associated properties that you can use to refine the appearance and behavior of a layout component instance. This section provides information about accessing and providing values for layout component properties. It contains the following subsections:

- Section 9.3.1, "Setting Properties on a Layout Component"
- Section 9.3.2, "Working with Box Layout Component Properties"
- Section 9.3.3, "Working with HTML Markup Layout Component Properties"
- Section 9.3.4, "Working with Hyperlink Layout Component Properties"
- Section 9.3.5, "Working with Image Layout Component Properties"
- Section 9.3.6, "Working with Movable Box Layout Component Properties"
- Section 9.3.7, "Working with Text Layout Component Properties"
- Section 9.3.8, "Working with Web Page Layout Component Properties"
- Section 9.3.9, "Working with Hidden Layout Component Properties"

9.3.1 Setting Properties on a Layout Component

Layout components have associated properties, which users with sufficient privileges can access from the Oracle Composer **Component Properties** dialog.

> **Note:** When you enter most types of property values in the Component Properties dialog and then click **Apply**, the dialog remains open. With values other than expected value types, the dialog closes, and the page is refreshed to reflect the new value.
>
> Expected values types include a string or an array of strings, where the component expects a value of type `java.lang.String[]`, and primitive values, such as integer, Boolean, float, double, and short.

There are two ways to access the Component Properties dialog: through Oracle Composer Design view and Oracle Composer Source view. This section describes both methods. It contains the following subsections:

- Section 9.3.1.1, "Setting Layout Component Properties in Design View"
- Section 9.3.1.2, "Setting Layout Component Properties in Source View"

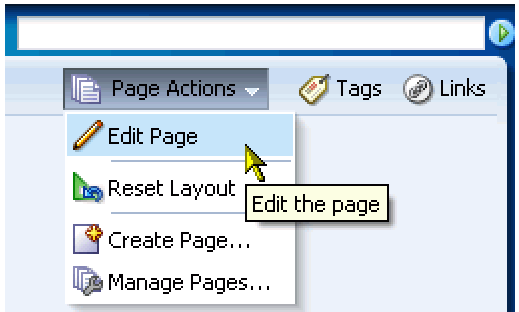
> **Note:** When you encounter errors in page edit mode, you can recover by closing your browser and then reopening it and relogging in to the application instance.

9.3.1.1 Setting Layout Component Properties in Design View

To set layout components properties in Design view:

1. Log in, and go to the page where you want to set properties on a layout component.
2. In WebCenter Spaces, select **Edit Page** from the **Page Actions** menu to open Oracle Composer (Figure 9–13).

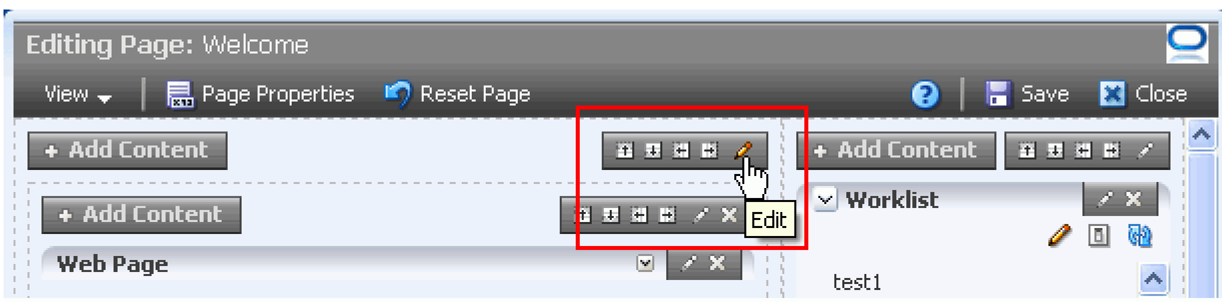
Figure 9–13 Edit Page Command on the Page Actions Menu



> **Tip:** If the **Edit Page** command is not available on the **Page Actions** menu or the **Page Actions** menu does not appear, it is likely that you do not have sufficient page access privileges. If this is the case, ask your application administrator for the privilege to edit pages. \
>
> For more information, see Section 2.8, "Contacting Your Application Administrator."

3. Click the **Edit** icon (Figure 9–14) on the layout component of interest to open the Component Properties dialog.

Figure 9–14 Edit Icon on a Layout Component



4. Edit component properties, and click **OK** when you have finished.

   Enter Parameter and Display Option values either unwrapped or wrapped in Expression Language syntax; for example, `value` or `#{value}`.

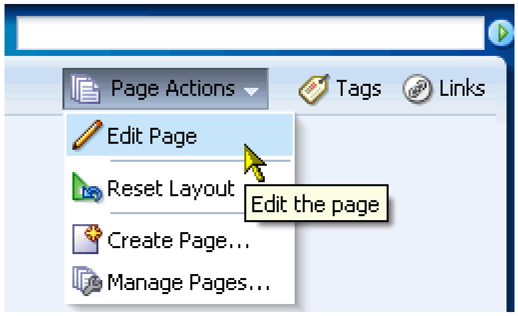
> **See Also:** For detailed information about layout component properties, see Section 9.3, "Working with Layout Component Properties."
>
> For detailed information about commonly-shared properties, see Section 10.4, "Setting Properties on Page Content."

9.3.1.2 Setting Layout Component Properties in Source View

To set layout component properties in Source view:

1. Log in, and go to the page where you want to set properties on a layout component.
2. From the **Page Actions** menu, select **Edit Page** to open Oracle Composer (Figure 9–15).

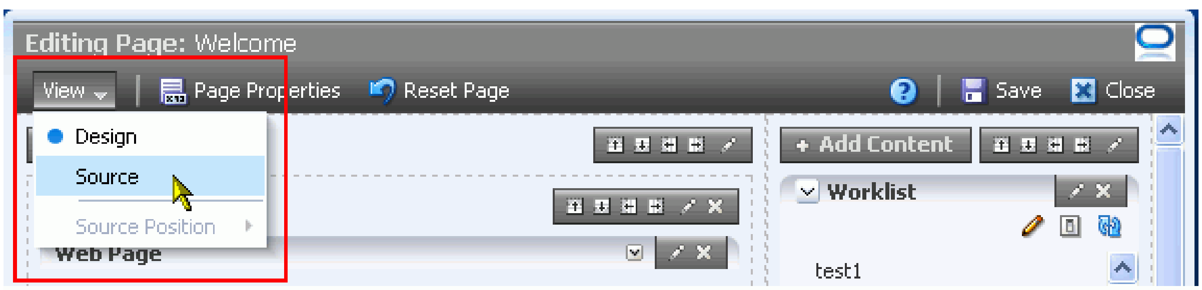
Figure 9–15 Edit Page Command on the Page Actions Menu



> **Tip:** If the **Edit Page** command is not available on the **Page Actions** menu or the **Page Actions** menu does not appear, it is likely that you do not have sufficient page access privileges. If this is the case, ask your application administrator for the privilege to edit pages.
>
> For more information, see Section 2.8, "Contacting Your Application Administrator."

3. From the **View** menu, select **Source** (Figure 9–22).

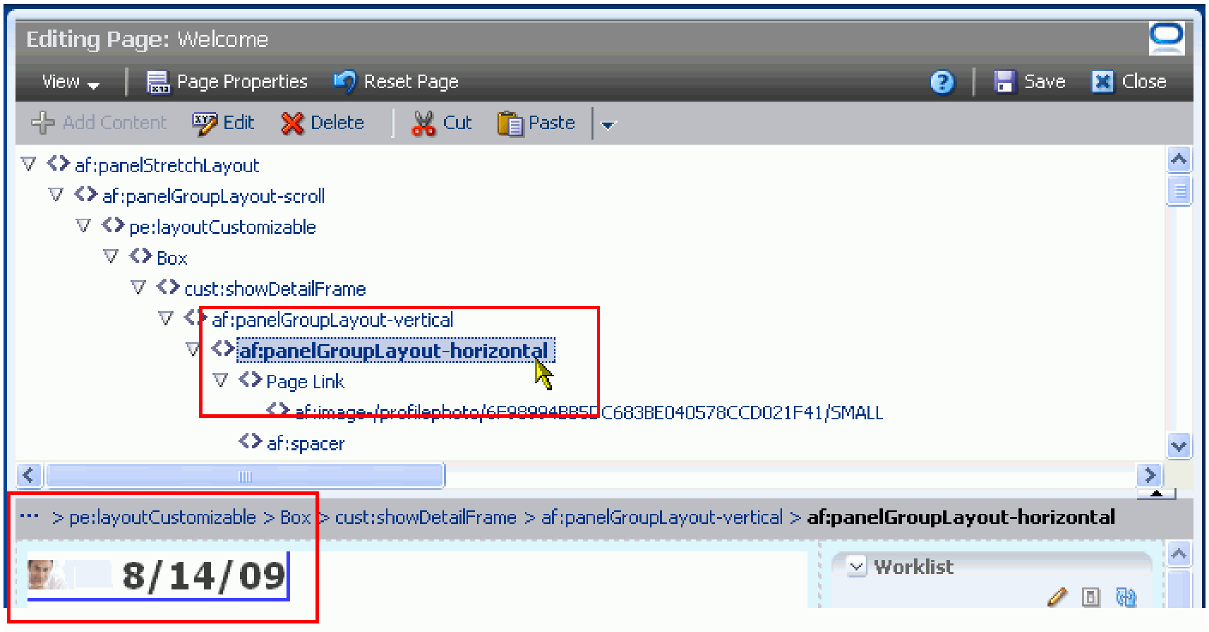
Figure 9–16 The Source Option on the View Menu in Oracle Composer



4. In the list of components, click the component with properties you want to configure.

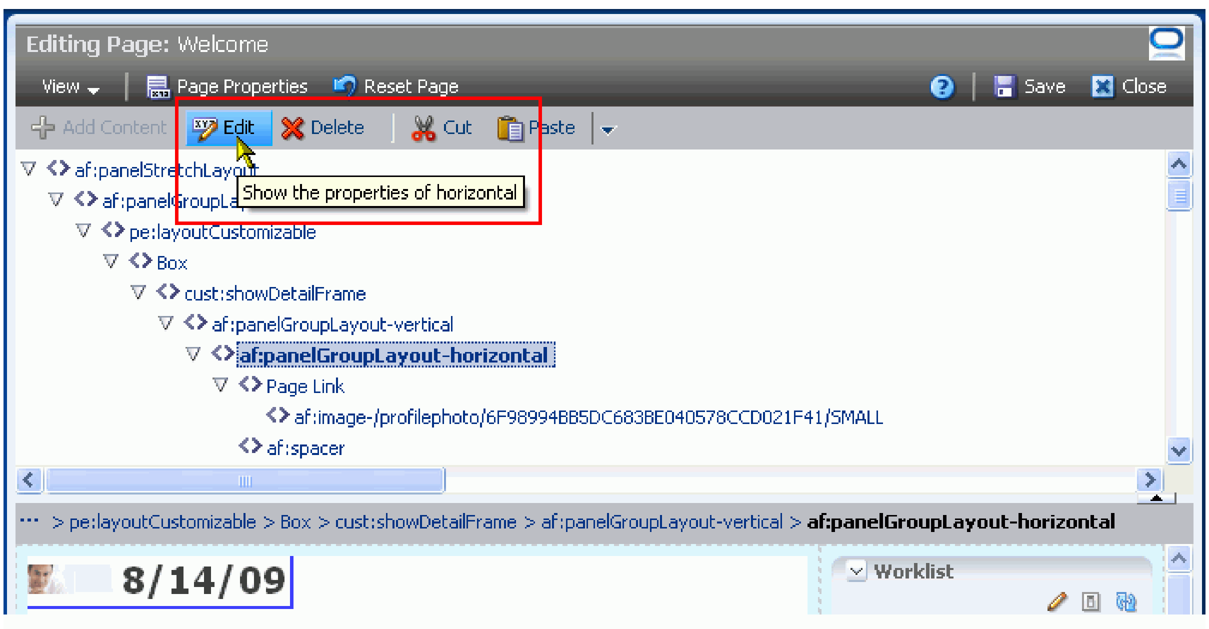
   Notice that the component itself is highlighted with a blue outline (Figure 9–17).

Figure 9–17 Selecting a Component in the Component Hierarchy



5. Click the **Edit** icon in the Source view header (Figure 9–18) to open the Component Properties dialog.

Figure 9–18 Edit Icon on Source View Header



6. Edit component properties, and click **OK** when you have finished.

   Enter Parameter and Display Option values either unwrapped or wrapped in Expression Language syntax; for example, `value` or `#{value}`.

9.3.2 Working with Box Layout Component Properties

Box layout component properties provide a means of enabling or disabling the display of an **Actions** menu, specifying the orientation of Box content (vertical, horizontal, scroll, stretch), rearranging Box components, and providing `ALT` text on the Box.

> **See Also:** For information about the Box layout component, see Section 9.1.1, "The Box Layout Component."
>
> For information about setting Box layout component properties, see Section 9.3.1, "Setting Properties on a Layout Component."

Table 9–1 lists and describes Box layout component display options.

Table 9–1 Box Layout Component Display Options

Property	Description
`Allow Action`	Options for enabling or disabling the display of various actions on the Box and on the components you add to the box Choose from: ▪ `all`—Show the **Add Content** button on the Box, show the **Add Box** icons, display the **Actions** menu on all Box child components that support it, and allow the movement of Movable Boxes into and out of the Box. ▪ `none`—Hide the **Add Content** button on the Box, hide the **Add Box** icons, and disable the display of the **Actions** menu on all Box child components. Additionally, any Movable Boxes inside the Box are frozen and cannot be moved; and users cannot move Movable Boxes into the Box.
`Layout`	A means of specifying the orientation of Box content Choose from: ▪ `vertical`—Align box content in a vertical orientation (that is, as a column of objects). ▪ `horizontal`—Align box content in a horizontal orientation (that is, as a row of objects). ▪ `scroll`—Align Box content vertically with a scrollbar. The scrollbar is rendered when the height/width of its content exceeds the Box's height or width. ▪ `stretch`—The Box stretches to accommodate the full display of one component. When you select stretch, the **Add Content** button is hidden after one component is added to the box and users are restricted from dragging and dropping content into the Box. Additionally, you cannot split a Box that is being stretched.
`Short Desc`	A field for entering `ALT` text for the box `ALT` text appears as a tooltip when users roll their mouse pointers over the box.
`Show Component`	An option for hiding or showing the component on the page ▪ Select to show the component ▪ Clear to hide the component Once you hide a component in this way, any child components are also hidden. You can show the component again in Oracle Composer Source view. Right-click the hidden component, and select **Show Component** from the resulting context menu.

> **Tip:** Display Options properties additionally provide access to an Expression Language (EL) editor, which you can use to enter and test EL values for Display Options properties.
>
> For more information, see Section 10.4.5, "Using Expression Language (EL) Expressions with Component Properties."

Box layout component properties include a **Child Components** tab with options for hiding, showing, and rearranging the Box content. For more information, see Section 10.4.6, "Working with Child Components."

Box layout component properties include a **Style** tab with options for setting styles on the component instance. The styles you set here override the styles that would otherwise govern the component's appearance. These include styles set on the component's parent container, the current page, and the application. Box style properties are common to many other components, and are listed and described in Section 10.4.7, "Working with Style and Content Style Properties."

9.3.3 Working with HTML Markup Layout Component Properties

HTML Markup layout component properties provide a means of entering a brief bit of HTML mark-up, JavaScript, text, or Expression Language (EL). For example, use the HTML Markup layout component to embed a YouTube video, Google Gadget, or Pandora Music Station (for more information, see Section 10.1.6, "Embedding Video, Music, Slides, and Other Types of Content").

In addition to content entry, use the controls on the Display Options tab to specify text entry behavior and apply `ALT` text.

> **See Also:** For information about the HTML Markup layout component, see Section 9.1.2, "The HTML Markup Layout Component."
>
> For information about setting layout component properties, see Section 9.3.1, "Setting Properties on a Layout Component."

Table 9–2 lists and describes HTML Markup layout component Display Options.

Table 9–2 HTML Markup Layout Component Display Options

Property	Description
`Escape`	A check box for enabling or disabling literal evaluation of special characters ■ Checked (`true`) enables literal evaluation of such characters as angle brackets (<|>) and HTML special characters. For example, when a user enters — it is rendered as —. ■ Cleared (`false`) disables literal interpretation of special characters. For example, when a user enters —, it is rendered as —. False is the default value.
`No Wrap`	A check box for enabling or disabling text wrapping ■ Checked (`true`) disables text wrapping. Users must enter line breaks manually. ■ Cleared (`false`) enables text wrapping. Lines wrap in accordance with the component width. False is the default value.

Table 9–2 (Cont.) HTML Markup Layout Component Display Options

Property	Description
`Short Desc`	A field for entering ALT text for the HTML Markup layout component When users roll their mouse pointers over the component, this text appears as a tooltip.
`Value`	A field for specifying the content that this component renders In addition to text, this parameter also accepts Expression Language (EL) expressions. For example: `#{bean.value}` After you save your changes and close the page editor, the HTML Markup component shows the evaluated value of the specified EL. For information about Expression Language expressions, see Section 10.4.5, "Using Expression Language (EL) Expressions with Component Properties."
`Show Component`	An option for hiding or showing the component on the page ■ Select to show the component ■ Clear to hide the component Once you hide a component in this way, any child components are also hidden. You can show the component again in Oracle Composer Source view. Right-click the hidden component, and select **Show Component** from the resulting context menu.

Tip: Display Options properties additionally provide access to an Expression Language (EL) editor, which you can use to enter and test EL values for Display Options properties.

For more information, see Section 10.4.5, "Using Expression Language (EL) Expressions with Component Properties."

HTML Markup layout component properties include a **Style** tab with options for setting styles on the component instance. The styles you set here override the styles that would otherwise govern the component's appearance. These include styles set on the component's parent container, the current page, and the application. HTML Markup style properties are common to many other components, and are listed and described in Section 10.4.7, "Working with Style and Content Style Properties."

9.3.4 Working with Hyperlink Layout Component Properties

Hyperlink layout component properties provide a means of specifying link text, target destination, and open behavior.

See Also: For information about the Hyperlink layout component, see Section 9.1.3, "The Hyperlink Layout Component."

For information about setting layout component properties, see Section 9.3.1, "Setting Properties on a Layout Component."

Table 9–3 lists and describes Hyperlink layout component display options.

Table 9–3 Hyperlink Layout Component Display Options

Property	Description
`Title`	A field for specifying hyperlink text Enter the word or phrase you want to use as link text.
`Destination`	A field for entering the hyperlink target URL Enter the Web address of the page you want to link to.
`Open in a new window`	Option for determining link target open behavior ■ Checked (`true`) means the link target should open in a new browser tab or window. ■ Cleared (`false`) means the link target should open in the current browser tab or window.
`Show Component`	An option for hiding or showing the component on the page ■ Select to show the component ■ Clear to hide the component Once you hide a component in this way, any child components are also hidden. You can show the component again in Oracle Composer Source view. Right-click the hidden component, and select **Show Component** from the resulting context menu.

> **Tip:** Display Options properties additionally provide access to an Expression Language (EL) editor, which you can use to enter and test EL values for Display Options properties.
>
> For more information, see Section 10.4.5, "Using Expression Language (EL) Expressions with Component Properties."

Hyperlink layout component properties include a **Style** tab with options for setting styles on the component instance. The styles you set here override the styles that would otherwise govern the component's appearance. These include styles set on the component's parent container, the current page, and the application. Hyperlink style properties are common to many other components, and are listed and described in Section 10.4.7, "Working with Style and Content Style Properties."

9.3.5 Working with Image Layout Component Properties

Image layout component properties provide a means of specifying the location of the image file, an optional hyperlink target, `ALT` text and a long description of the image, and a target frame for the hyperlink.

> **See Also:** For information about the Image layout component, see Section 9.1.4, "The Image Layout Component."
>
> For information about setting layout component properties, see Section 9.3.1, "Setting Properties on a Layout Component."

Table 9–4 lists and describes Image layout component display options.

Table 9–4 Image Layout Component Properties

Property	Description
`Destination URI`	A URL for the Image link target destination For your link target, you can use URLs that are internal or external to the application. **WebCenter Spaces only:** For an internal target, that is, for a WebCenter Spaces page, you can use a directory path relative to the application root directory.
`Image Source`	The URL to the image file Use any Web-compatible image from any internal or publicly-accessible location.
`Long Desc URL`	A URL to a file Typically, a long description link opens a file that provides a full description of the Image when `ALT` text is not sufficiently descriptive. But you can use this parameter to link to any file.
`Short Desc`	Image `ALT` text `ALT` text appears as a tooltip when users roll their mouse pointers over the image.
`Target Frame`	Open behavior for the link target Enter any standard browser target, such as: ▪ `_top`—Loads the link target in the current browser window (as opposed to the current frame) ▪ `_parent`—Loads the link target in the parent frame of the current frame. ▪ `_self`—Loads the link target within the same frame as the frame containing the link. ▪ `_blank`—Loads the link target in a new browser tab or window, leaving the original page open.
`Show Component`	An option for hiding or showing the component on the page ▪ Select to show the component ▪ Clear to hide the component Once you hide a component in this way, any child components are also hidden. You can show the component again in Oracle Composer Source view. Right-click the hidden component, and select **Show Component** from the resulting context menu.

Tip: Display Options properties additionally provide access to an Expression Language (EL) editor, which you can use to enter and test EL values for Display Options properties.

For more information, see Section 10.4.5, "Using Expression Language (EL) Expressions with Component Properties."

Image layout component properties include a **Style** tab with options for setting styles on the component instance. The styles you set here override the styles that would otherwise govern the component's appearance. These include styles set on the component's parent container, the current page, and the application. Image style properties are common to many other components, and are listed and described in Section 10.4.7, "Working with Style and Content Style Properties."

9.3.6 Working with Movable Box Layout Component Properties

Movable Box layout component properties provide a means of specifying the appearance and behavior of a Movable Box.

> **See Also:** For information about the Movable Box layout component, see Section 9.1.5, "The Movable Box Layout Component."
>
> For information about setting layout component properties, see Section 9.3.1, "Setting Properties on a Layout Component."

Table 9–5 lists and describes the Movable Box layout component display options.

Table 9–5 Movable Box Layout Component Display Options

Property	Description
`Background`	Select from `light`, `medium`, or `dark` to specify a shade of color for the component background.

`Display Actions`	Specify how to display actions on the component instance. Actions include the **Remove** icon, the **Actions menu** icon, and the Resizer.
	Choose from:
	■ `Always`—Always display actions on the component header.
	■ `onHover`—Display actions when users hover their mouse pointers over the component header.
	`Display Header` must be selected for these options to fully apply. If a header is not shown:
	■ In page view mode:
	    ■ `always`—only the Resizer is shown.
	    ■ `onHover`—the Resizer is shown only when users hover their mouse pointers over the component.
	■ In page edit mode:
	    ■ `always`—All actions except the Resizer display on a floating palette. All actions display only when users hover their mouse pointers over the component.
	    ■ `onHover`—Only the Resizer is shown when users hover their mouse pointers over the component.

`Display Header`	Select this check box to display a header on the Movable Box. A header is depicted in the following graphic. 
`Display Shadow`	Select to display a drop-shadow behind the component instance.
`Short Desc`	Provide `ALT` text for the component instance. When users roll their mouse pointers over the component instance, the text you enter here pops up.

Table 9–5 (Cont.) Movable Box Layout Component Display Options

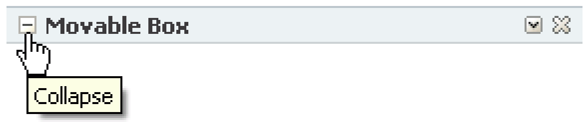
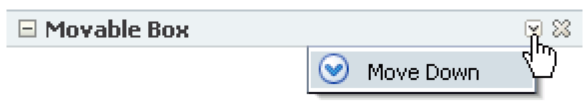
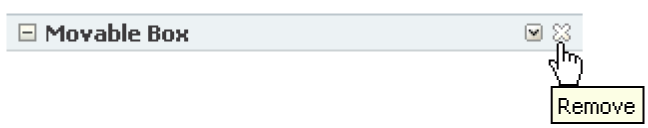
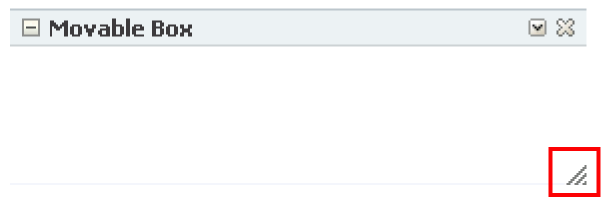
Property	Description
`Show Minimize Action`	Select whether to display the minimize action on the component header (that is, a **Collapse** icon on the component chrome). Choose from: ■ `none`—Do not display the **Collapse** icon. ■ `chrome`—Display the **Collapse** icon on the component header. 
`Show Move Action`	Select whether to display **Move Up** and **Move Down** commands on the component **Actions** menu. Choose from: ■ `none`—Do not display Move commands on the **Actions** menu. ■ `menu`—Display Move commands on the **Actions** menu.  On a Movable Box, the Actions menu icon displays only when components are located above or below the Movable Box.
`Show Remove Action`	Select whether to display the **Remove** icon on the component header (that is, the component chrome). Choose from: ■ `none`—Do not display the **Remove** icon in the component header in page view mode. In page edit mode, this icon always appears. `none` is the default value. ■ `chrome`—Display the **Remove** icon on the component header in page view mode.  Note that after you select to remove a component in this way, you can restore it using these methods: ■ Exit page edit mode without saving. ■ Select the **Reset Layout** command from the **Page Actions** menu. **Reset Layout** removes all page personalizations, so any component removed during a page personalization is restored (for more information, seeSection 4.3, "Removing Your Page Personalizations"). ■ Edit the page, and add another component instance.

Table 9–5 (Cont.) Movable Box Layout Component Display Options

Property	Description
`Show Resizer`	Select whether to display a window resizer on a component instance. The window resizer enables you to increase the component height. Choose from: ■ `always`—Always display the window resizer. ■ `never`—Never display the window resizer. 
`Stretch Content`	Select to stretch the content to fill the container. For example, all task flows and portlets are wrapped in a container. If you change the height of the container, through the Content Style `Height` property, `Stretch Content` specifies that the task flow or portlet should be stretched to fill the specified height. Content always takes up the full width of its parent container.
`Text`	By default, this value is `Movable Box`. Use this property to specify another display name for the box. The value you provide here appears in the box header. If you select to hide the box header, the `Text` value is ignored.
`Show Component`	An option for hiding or showing the component on the page ■ Select to show the component ■ Clear to hide the component Once you hide a component in this way, any child components are also hidden. You can show the component again in Oracle Composer Source view. Right-click the hidden component, and select **Show Component** from the resulting context menu.

> **Tip:** Display Options properties additionally provide access to an Expression Language (EL) editor, which you can use to enter and test EL values for Display Options properties.
>
> For more information, see Section 10.4.5, "Using Expression Language (EL) Expressions with Component Properties."

Movable Box layout component properties include a **Style** tab with options for setting styles on the component instance. The styles you set here override the styles that would otherwise govern the component's appearance. These include styles set on the component's parent container, the current page, and the application. Movable Box style properties are common to many other components, and are listed and described in Section 10.4.7, "Working with Style and Content Style Properties."

9.3.7 Working with Text Layout Component Properties

Text layout component properties provide a means of specifying the appearance and behavior of a Text layout component.

> **See Also:** For information about the Text layout component, see Section 9.1.6, "The Text Layout Component."
>
> For information about setting layout component properties, see Section 9.3.1, "Setting Properties on a Layout Component."

Text layout component properties include the same options as provided for a Movable Box layout component. For more information, see Table 9–5, " Movable Box Layout Component Display Options".

> **Tip:** Display Options properties additionally provide access to an Expression Language (EL) editor, which you can use to enter and test EL values for Display Options properties.
>
> For more information, see Section 10.4.5, "Using Expression Language (EL) Expressions with Component Properties."

Text layout component properties include style tabs with options for setting styles on the component instance. The styles you set here override the styles that would otherwise govern the component's appearance. These include styles set on the component's parent container, the current page, and the application. Text style properties are common to many other components, and are listed and described in Section 10.4.7, "Working with Style and Content Style Properties."

9.3.8 Working with Web Page Layout Component Properties

Web Page layout component properties provide a means of specifying the URL of the content to render in the Web Page area and the `ALT` text to display when users roll their mouse pointers over the component border.

> **See Also:** For information about the Web Page layout component, see Section 9.1.7, "The Web Page Layout Component."
>
> For information about setting layout component properties, see Section 9.3.1, "Setting Properties on a Layout Component."

Table 9–6 lists and describes Web Page layout component display options.

Table 9–6 Web Page Layout Component Display Options

Property	Description
`Short Desc`	A field for entering `ALT` text for the Web Page area Note that, for the Web Page component, the **ALT** text appears only when users hover their mouse pointers over the component border. You can improve the ease of this occurrence by increasing, for example, the padding around the component using the `Other CSS` property on the Component Properties **Style** tab. For example, you can enter the following in the `Other CSS` text box: `padding-top:30px;`
`Source`	A field for entering the fully qualified URL to the source Web content to render in the Web Page area For example: `http://www.oracle.com` Note that `www.oracle.com` (that is, without `http://`) does not qualify. If a given URL is invalid, your content does not render within the Web Page layout component. You can also open a window onto a wiki or a blog through this property. For more information, see Chapter 30, "Working with Wikis and Blogs." **Note:** Use the component's Style properties to adjust the width and height of the display area (for more information, see Section 10.4.7, "Working with Style and Content Style Properties."). **WebCenter Spaces only:** If you plan to display the content of another WebCenter Spaces page, you can use a relative address. For more information, see Section 9.1.7, "The Web Page Layout Component."
`Show Component`	An option for hiding or showing the component on the page ■ Select to show the component ■ Clear to hide the component Once you hide a component in this way, any child components are also hidden. You can show the component again in Oracle Composer Source view. Right-click the hidden component, and select **Show Component** from the resulting context menu.

Tip: Display Options properties additionally provide access to an Expression Language (EL) editor, which you can use to enter and test EL values for Display Options properties.

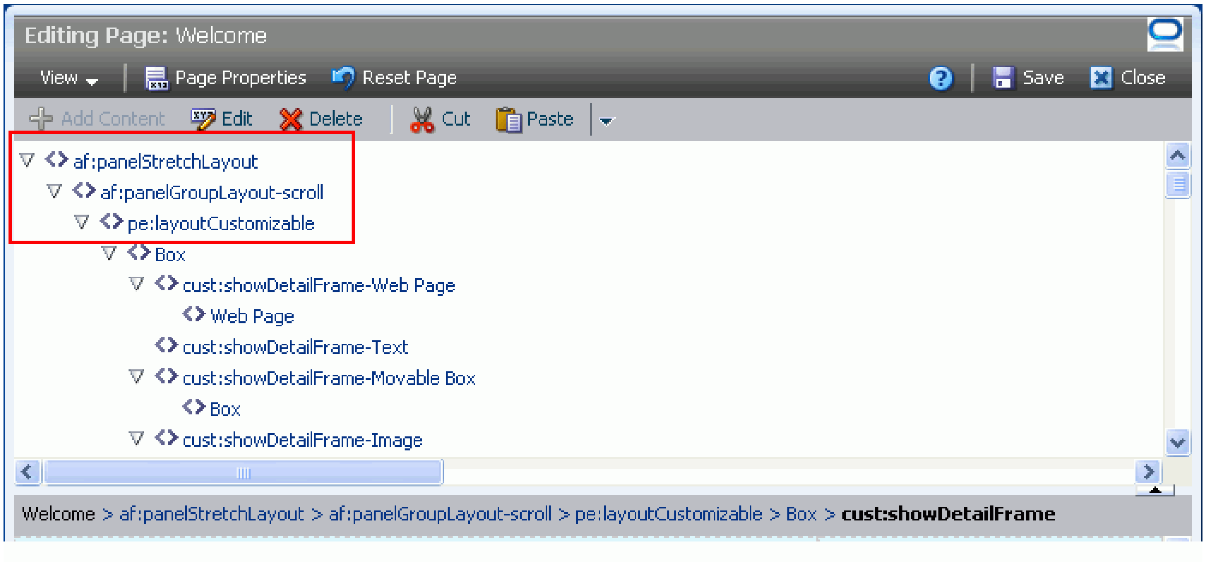
For more information, see Section 10.4.5, "Using Expression Language (EL) Expressions with Component Properties."

Web Page layout component properties include a **Style** tab with options for setting styles on the component instance. The styles you set here override the styles that would otherwise govern the component's appearance. These include styles set on the component's parent container, the current page, and the application. Web Page style properties are common to many other components, and are listed and described in Section 10.4.7, "Working with Style and Content Style Properties."

9.3.9 Working with Hidden Layout Component Properties

Some page layout components are not exposed for use in the Oracle Composer Catalog. They are nonetheless on view and configurable when you edit a page and set Oracle Composer to Source view (Figure 9–19).

Figure 9–19 Hidden Layout Components Exposed in Source View



This section lists and describes the configurable properties associated with such components. It contains the following subsections:

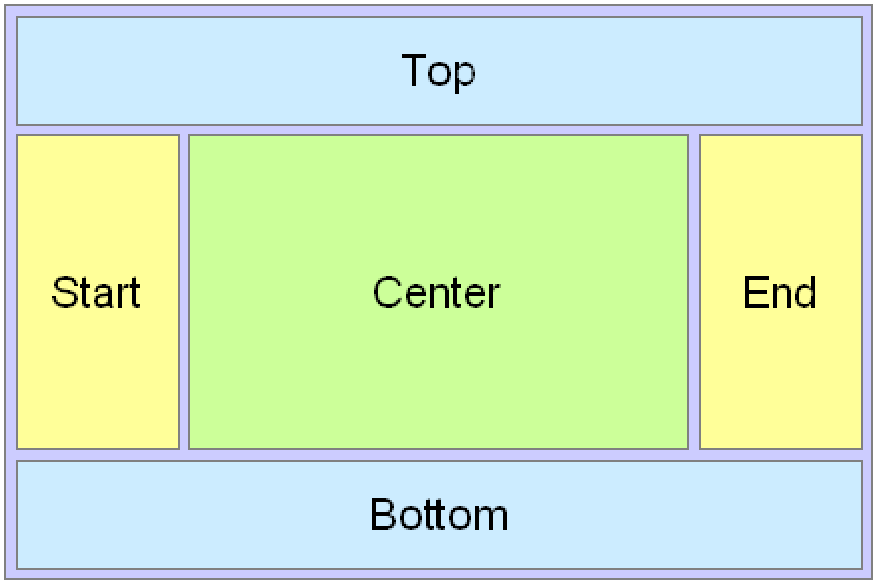
- Section 9.3.9.1, "Working with panelStretchLayout Properties"
- Section 9.3.9.2, "Working with panelGroupLayout Properties"
- Section 9.3.9.3, "Working with Change Layout/Layout Customizable Properties"
- Section 9.3.9.4, "Working with spacer Properties"

9.3.9.1 Working with panelStretchLayout Properties

The panelStretchLayout component provides a means of arranging content in defined areas on a page. This component is useful for enabling content to stretch when the browser is resized.

The panelStretchLayout component's defined areas are called *facets* (Figure 9–20).

Figure 9–20 Facets of a panelStretchLayout Component



Note: Figure 9–20 shows the facets when the language reading direction of the application is configured left-to-right. If instead the language direction is right-to-left, the start and end facets are switched.

Facets are controlled by the values you enter for its Display Options properties. When you set the height of the top and bottom facets, any contained components are stretched up to fit the height. Similarly, when you set the width of the start and end facets, any components contained in those facets are stretched to that width. If no components are placed in a facet, then the facet does not take up any space.

Enter values for component properties, or click the **Edit** icon next to a property to open a simple EL Editor, where you can select from prebuilt expressions or enter values manually. For more information, see Section 10.4.5, "Using Expression Language (EL) Expressions with Component Properties."

See Also: For information about the panelStretchLayout component, see Section 9.1.8, "Hidden Layout Components."

For information about setting layout component properties, see Section 9.3.1, "Setting Properties on a Layout Component."

Table 9–7 lists and describes the panelStretchLayout properties that appear on the **Display Options** tab in the Component Properties dialog.

Note: All panelStretchLayout height and width facets take the value `auto`; however, using `auto` slows page performance.

Table 9–7 panelStretchLayout Display Options

Property	Description
`Bottom Height`	The height of the bottom facet. Use any standard CSS unit of measure, such as pt, px, pc, li, and so on. Never express a Height value as a percentage. Because of differences between browsers and between layout containers, percentages do not work as you expect. If you want your component to take up 100% of a page, consider creating a page using the Stretch page style and adding the component to it.
`End Width`	The width of the end facet. Use any standard CSS unit of measure, such as pt, px, pc, li, and so on.
`Short Desc`	A field for entering `ALT` text for the component `ALT` text appears as a tooltip when users roll their mouse pointers over the component.
`Start Width`	The width of the start facet. Use any standard CSS unit of measure, such as pt, px, pc, li, and so on.
`Theme`	The component style theme to apply to the children of this component. Use this property to change the theme without causing associated skin changes. Application skins are the sources of the themes. Some skins may have no themed definitions. Enter one of: ■ dark ■ medium ■ light No theme (none) is the default.
`Top Height`	The height of the top facet. Use any standard CSS unit of measure, such as pt, px, pc, li, and so on. Never express a Height value as a percentage. Because of differences between browsers and between layout containers, percentages do not work as you expect. If you want your component to take up 100% of a page, consider creating a page using the Stretch page style and adding the component to it.
`Show Component`	An option for hiding or showing the component on the page ■ Select to show the component ■ Clear to hide the component Once you hide a component in this way, any child components are also hidden. You can show the component again in Oracle Composer Source view. Right-click the hidden component, and select **Show Component** from the resulting context menu.

9.3.9.2 Working with panelGroupLayout Properties

The panelGroupLayout component provides a means of arranging a series of child components vertically or horizontally (no wrapping), or consecutively (wrapping). The component's `Layout` property determines the arrangement of child components.

Enter values for component properties, or click the **Edit** icon next to a property to open a simple EL Editor, where you can select from prebuilt expressions or enter values manually. For more information, see Section 10.4.5, "Using Expression Language (EL) Expressions with Component Properties."

> **See Also:** For information about the panelGroupLayout component, see Section 9.1.8, "Hidden Layout Components."
>
> For information about setting layout component properties, see Section 9.3.1, "Setting Properties on a Layout Component."

Table 9–8 lists and describes the panelGroupLayout properties that appear on the **Display Options** tab in the Component Properties dialog.

Table 9–8 panelGroupLayout Display Options

Property	Description
`Halign`	A means of expressing the horizontal alignment of component content Select one of: ■ `start`—align content horizontally, starting from the starting position This is either left or right depending on whether the current context is localized for a left-reading or right-reading language. ■ `center`—align content horizontally, starting from the center ■ `end`—align content horizontally, starting from the ending position This is either right or left depending on whether the current context is localized for a left-reading or right-reading language. ■ `left`—align content horizontally, starting from the left ■ `right`—align content horizontally, starting from the right
`Layout`	A means of specifying the orientation of component content Choose from: ■ `default`—align content vertically. ■ `horizontal`—align content horizontally ■ `vertical`—align content vertically ■ `scroll`—align content vertically with a scrollbar The scrollbar is rendered when the height/width of its content exceeds the component height or width.
`Short Desc`	A field for entering `ALT` text for the component `ALT` text appears as a tooltip when users roll their mouse pointers over the component.

Table 9–8 (Cont.) panelGroupLayout Display Options

Property	Description
`Theme`	The component style theme to apply to the children of this component. Use this property to change the theme without causing associated skin changes. Application skins are the sources of the themes. Some skins may have no themed definitions. Enter one of: ■ dark ■ medium ■ light No theme (none) is the default.
`Valign`	A means of expressing the vertical alignment of component content. Select one of: ■ `middle`—content is placed in the middle of the parent component ■ `top`—content is placed at the top of the parent component ■ `bottom`—content is placed at the bottom of the parent component ■ `baseline`—content is placed on the baseline of the parent component
`Show Component`	An option for hiding or showing the component on the page ■ Select to show the component ■ Clear to hide the component Once you hide a component in this way, any child components are also hidden. You can show the component again in Oracle Composer Source view. Right-click the hidden component, and select **Show Component** from the resulting context menu.

Properties for the `panelGroupLayout` component include a **Child Components** tab with options for hiding, showing, and rearranging component content. For more information, see Section 10.4.6, "Working with Child Components."

9.3.9.3 Working with Change Layout/Layout Customizable Properties

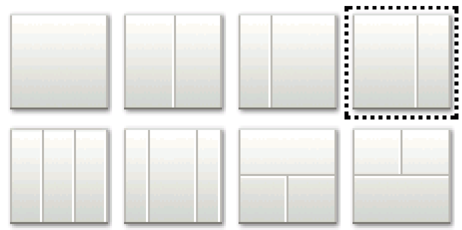
The Layout Customizable component provides a means (through a **Change Layout** button or a link) of switching the current page style to another style. Not all page styles can be switched at runtime. For information about seeded page styles that can and cannot be switched at runtime, see Table 7–2.

> **See Also:** For information about the Change Layout/Layout Customizable component, see Section 9.1.8, "Hidden Layout Components."
>
> For information about setting layout component properties, see Section 9.3.1, "Setting Properties on a Layout Component."

Table 9–9 lists and describes the Layout Customizable properties that appear on the **Layout Customizable Properties** and **Display Options** tabs in the Component Properties dialog.

Enter values for component properties, or click the **Edit** icon next to a property to open a simple EL Editor, where you can select from prebuilt expressions or enter values manually. For more information, see Section 10.4.5, "Using Expression Language (EL) Expressions with Component Properties."

Table 9–9 Layout Customizable Properties

Property	Description
`Layout Switcher`	 Eight options for determining page layout The current layout is highlighted with a dashed outline. Click another option to switch to its layout model.
`Short Desc`	A field for entering `ALT` text for the component `ALT` text appears as a tooltip when users roll their mouse pointers over the component.
`Show Icon`	A check box for specifying that a **Change Layout** icon should appear on the page (checked)
`Show Layout Changer`	A check box for specifying whether to show or hide the Change Layout button or link in page view mode The Change Layout button or link always displays in page edit mode.
`Text`	A means of revising the Change Layout button or link text Enter text in the field provided.
`Show Component`	An option for hiding or showing the component on the page ■ Select to show the component ■ Clear to hide the component Once you hide a component in this way, any child components are also hidden. You can show the component again in Oracle Composer Source view. Right-click the hidden component, and select **Show Component** from the resulting context menu.

9.3.9.4 Working with spacer Properties

The spacer component provides a means of incorporating some blank space in pages so that the page appears less cluttered than it would if all the components were presented immediately next to each other or immediately below each other.

Enter values for component properties, or click the **Edit** icon next to a property to open a simple EL Editor, where you can select from prebuilt expressions or enter values manually. For more information, see Section 10.4.5, "Using Expression Language (EL) Expressions with Component Properties."

> **See Also:** For information about the panelStretchLayout component, see Section 9.1.8, "Hidden Layout Components."
>
> For information about setting layout component properties, see Section 9.3.1, "Setting Properties on a Layout Component."

Table 9–10 lists and describes the spacer properties that appear on the Display Options tab in the Component Properties dialog.

Table 9–10 spacer Display Options

Property	Description
`Height`	A field for specifying the spacer height Use any standard CSS unit of measure, such as pt, px, pc, li, and so on. Never express a Height value as a percentage. Because of differences between browsers and between layout containers, percentages do not work as you expect.
`Short Desc`	A field for entering `ALT` text for the component `ALT` text appears as a tooltip when users roll their mouse pointers over the component.
`Width`	A field for specifying spacer width Use any standard CSS unit of measure, such as pt, px, pc, li, %, and so on.
`Show Component`	An option for hiding or showing the component on the page ▪ Select to show the component ▪ Clear to hide the component Once you hide a component in this way, you can show it again in Oracle Composer Source view. Right-click the hidden component, and select **Show Component** from the resulting context menu.

9.4 Deleting Layout Components

When you delete a layout component, such as a Box, all of the component's children—that is, anything contained in or hierarchically lower than the component—are also deleted. For example, if you delete a Box that contains multiple task flows, the Box and all of the task flow instances it contains are deleted.

Note: You cannot recover deleted components unless they were seeded components included in the page style used when the page was created. For information about restoring a page to its seeded state, see Section 8.2.2, "Removing All Edits, Personalizations, and Customizations from a Page."

The controls for deleting a component are located on the component itself in Oracle Composer Design view and on the header of the list of components in Source view. This section describes how to delete layout components in both Design view and Source view. It contains the following subsections:

- Section 9.4.1, "Deleting a Layout Component in Design View"
- Section 9.4.2, "Deleting a Layout Component in Source View"

9.4.1 Deleting a Layout Component in Design View

To delete a layout component in Design view:

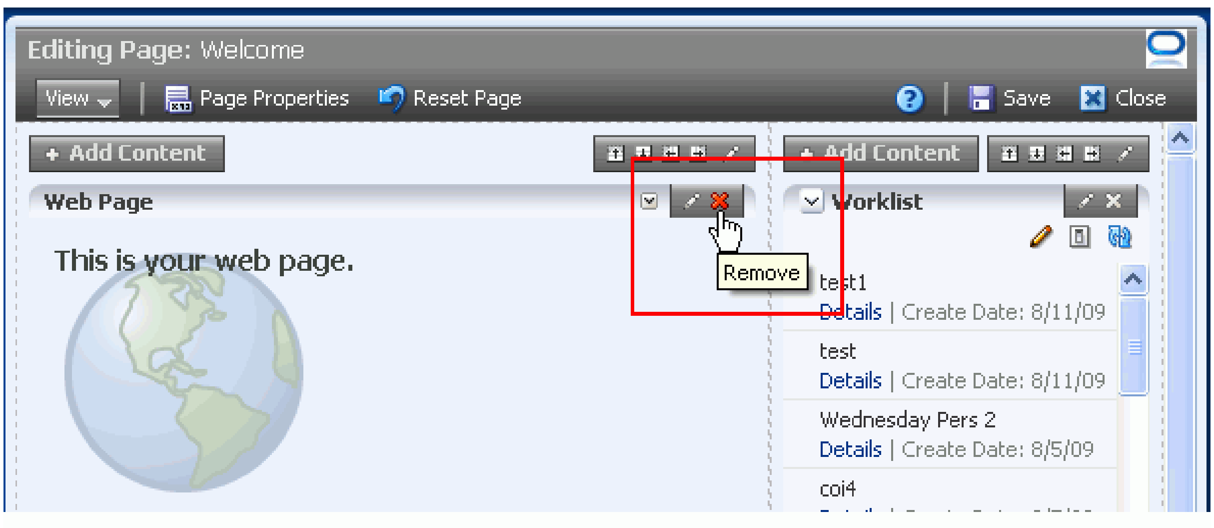
1. Log in, and go to the page that contains the layout component you want to delete.
2. From the **Page Actions** menu, select **Edit Page** to open the page in Oracle Composer.

Tip: If the **Edit Page** command is not available on the **Page Actions** menu or the **Page Actions** menu does not appear, it is likely that you do not have sufficient page access privileges. If this is the case, ask your application administrator for the privilege to edit pages.

For more information, see Section 2.8, "Contacting Your Application Administrator."

3. If necessary, open the **View** menu and select **Design**.
4. Click the **Remove** icon on the component header (Figure 9–21), or, if no header is shown, on the component's floating palette.

Figure 9–21 Remove Icon on a Layout Component Header



5. Click the **Delete** button in the resulting delete confirmation dialog.

   The layout component is permanently removed from the page. If the layout component had any child components, such as an Image inside a Movable Box, those child components are deleted as well.

9.4.2 Deleting a Layout Component in Source View

To delete a layout component in Source view:

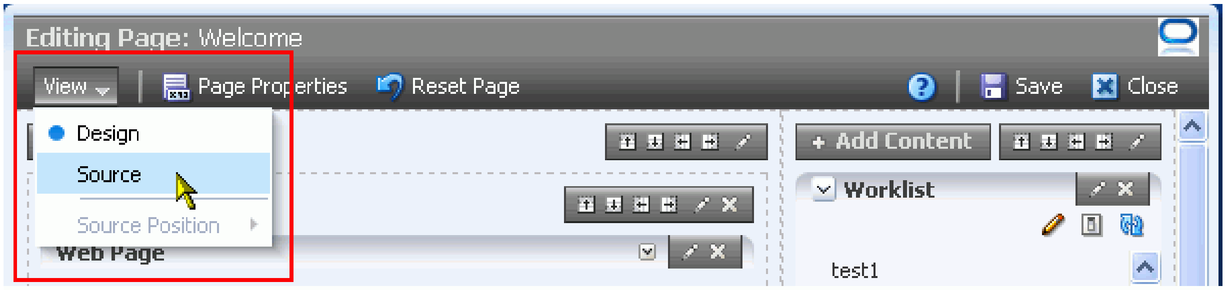
1. Log in, and go to the page that contains the layout component you want to delete.
2. From the **Page Actions** menu, select **Edit Page** to open Oracle Composer.

Tip: If the **Edit Page** command is not available on the **Page Actions** menu or the **Page Actions** menu does not appear, it is likely that you do not have sufficient page access privileges. If this is the case, ask your application administrator for the privilege to edit pages.

For more information, see Section 2.8, "Contacting Your Application Administrator."

3. From the **View** menu, select **Source** (Figure 9–22).

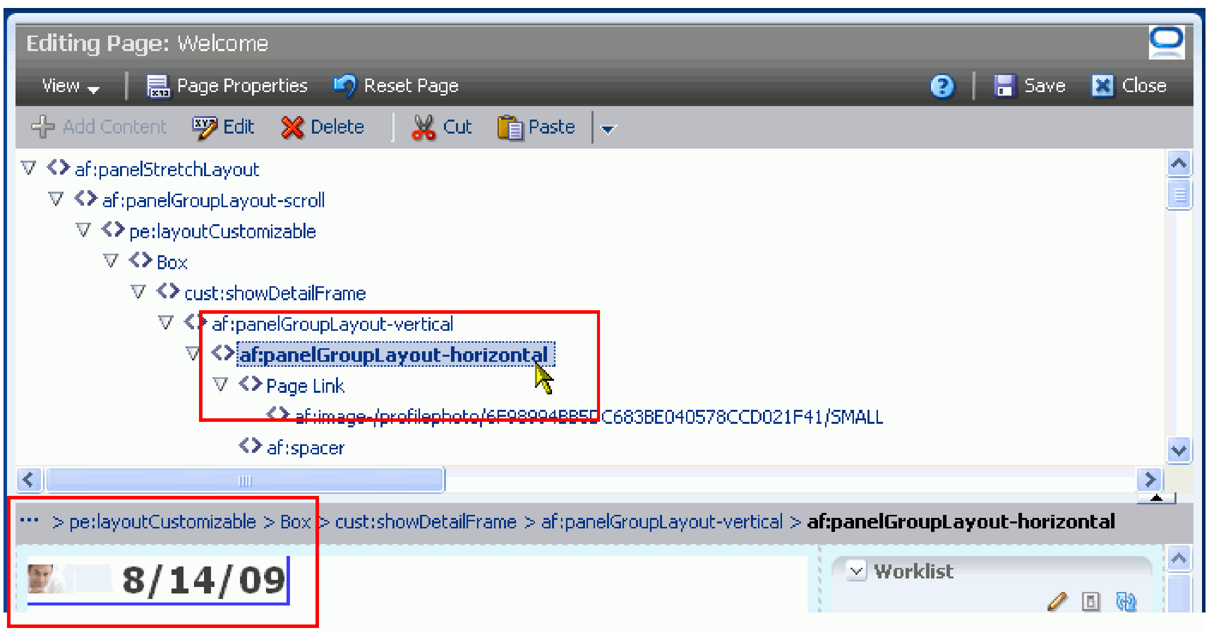
Figure 9–22 The Source Option on the View Menu in Oracle Composer



4. In the list of components, click the component you want to delete.

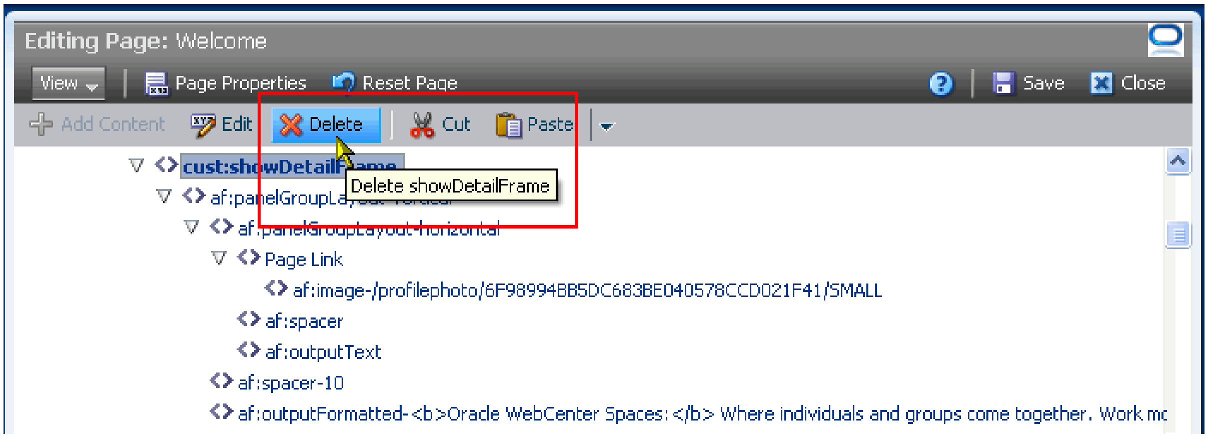
   Notice that the component itself is highlighted with a blue outline (Figure 9–23).

Figure 9–23 Selecting a Component in the Component Hierarchy



5. Click the **Delete** icon on the list header (Figure 9–24).

Figure 9–24 Delete Icon on Source View Header



6. Click the **Delete** button in the resulting delete confirmation dialog.

   The layout component is permanently removed from the page. If the layout component had any child components, such as an Image inside a Movable Box, those child components are deleted as well.

10 Working with Page Content

The process of adding content to a page is simple and straightforward. Things get interesting when you arrange and configure that content to meet the requirements of your enterprise. This chapter describes how to add and arrange page content and how to manage that content. It also describes how to configure the properties commonly shared among many types of components. It contains the following sections:

- Section 10.1, "Adding Content to a Page"
- Section 10.2, "Customizing and Personalizing Page Content"
- Section 10.3, "Deleting Page Content"
- Section 10.4, "Setting Properties on Page Content"

Audience

This chapter is intended for users who want to build pages by adding different objects and dynamic components. Such users include everyone working in their personal spaces (provided their WebCenter application enables their control over all aspects of their personal spaces—the out-of-the-box default) and authorized users working in group spaces.

Much of this information also applies to custom WebCenter applications, though it is written with WebCenter Spaces users in mind. (For information about the Page service in custom WebCenter applications, see the chapter "Enabling the Runtime Creation and Management of Pages" in *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter*.)

Your application administrator has the authority to expose or hide a particular service's task flows. Tasks discussed in this chapter are not available to you if the relevant service is hidden.

10.1 Adding Content to a Page

This section describes how to add content from the Oracle Composer Catalog to your application pages. It contains the following subsections:

- Section 10.1.1, "What You Should Know About Adding Content"
- Section 10.1.2, "Accessing and Exiting Oracle Composer"
- Section 10.1.3, "Adding Documents to a Page"
- Section 10.1.4, "Adding Task Flows to a Page"
- Section 10.1.5, "Adding Portlets to a Page"
- Section 10.1.6, "Embedding Video, Music, Slides, and Other Types of Content"

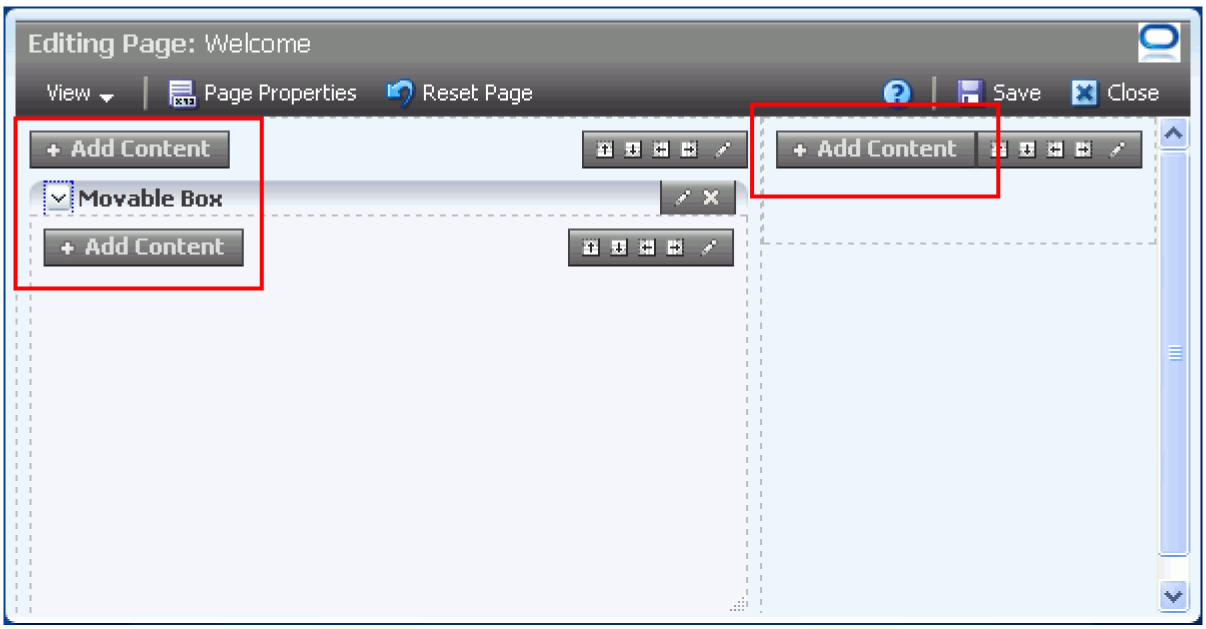
See Also: For information about creating pages and adding and configuring page layout components, see Chapter 8, "Creating, Editing, and Deleting Pages."

Advanced users can extend WebCenter Spaces by adding custom task flows. For more information, see the white paper, "*Extending WebCenter Spaces (11.1.1.2.0)*," on the Oracle Technology Network: `http://www.oracle.com/technology/products/webcenter/white_papers.html`.

10.1.1 What You Should Know About Adding Content

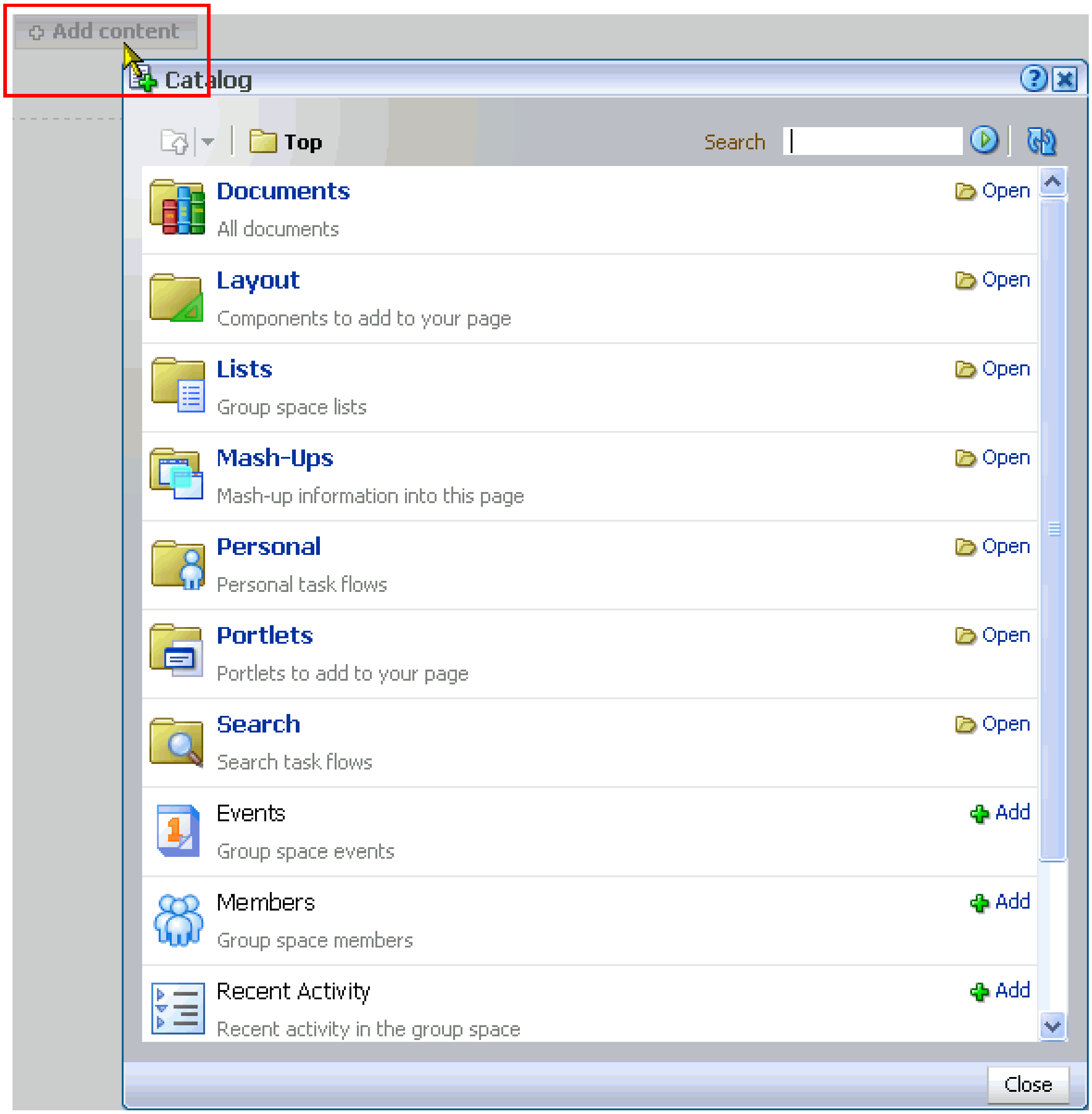
In the edit page mode of Oracle Composer, you can add content wherever you see the **Add Content** button (Figure 10–1).

Figure 10–1 Add Content Buttons in Oracle Composer



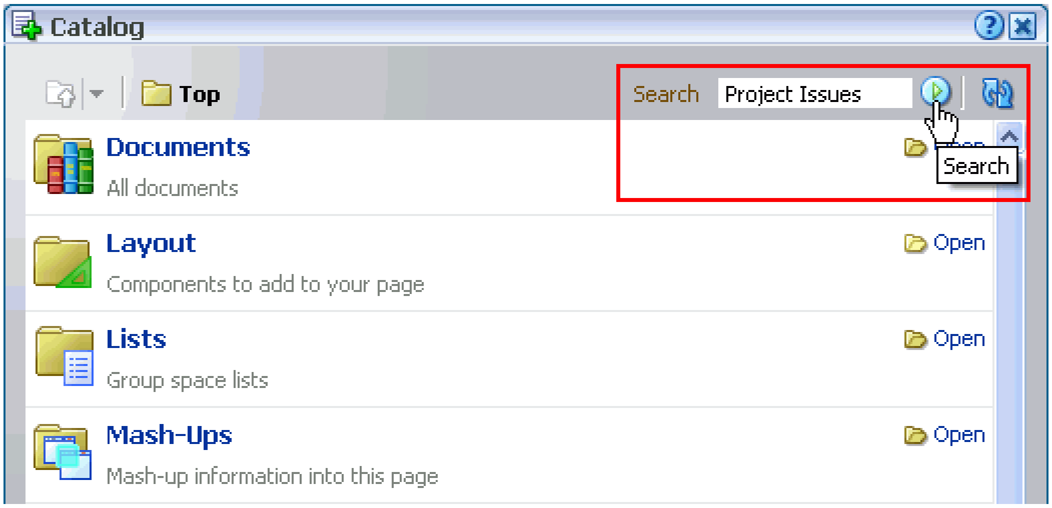
Clicking **Add Content** opens the Oracle Composer Catalog, which provides access to all the documents, task flows, Portlets, and layout components you can add to a page (Figure 10–2).

Figure 10–2 Oracle Composer Add Content Button and the Resulting Catalog



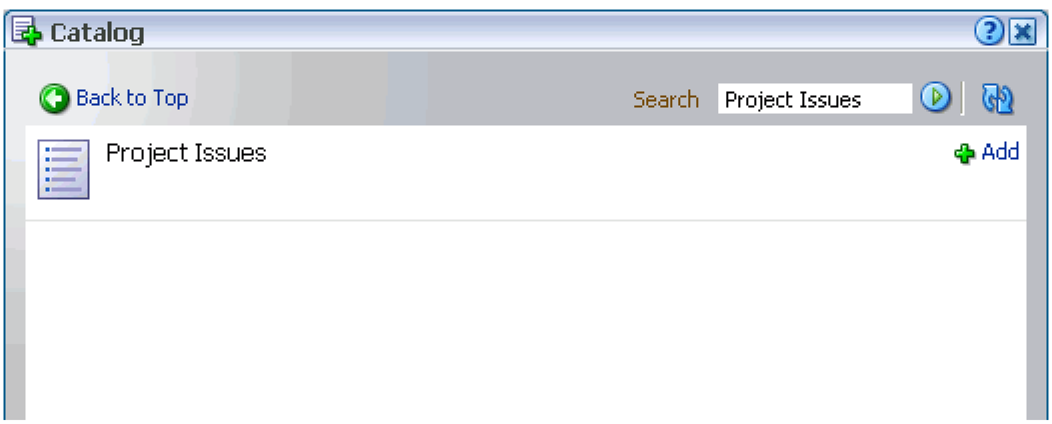
Many Catalog resources are organized in folders and subfolders. Because the Catalog can get quite deep with resources, it also provides a search feature for finding the object you want to add. Enter a search term in the **Search** field (Figure 10–3).

Figure 10–3 The Search Feature in the Catalog



Results display in the Catalog (Figure 10–4).

Figure 10–4 Catalog Search Results



10.1.2 Accessing and Exiting Oracle Composer

This section describes how to open and exit Oracle Composer. It contains the following subsections:

- Section 10.1.2.1, "Opening a Page in Oracle Composer"
- Section 10.1.2.2, "Opening and Closing the Oracle Composer Catalog"
- Section 10.1.2.3, "Exiting Oracle Composer"

10.1.2.1 Opening a Page in Oracle Composer

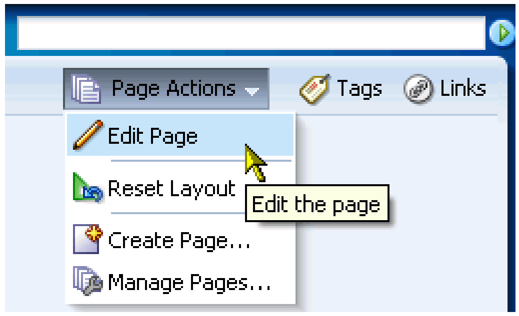
When you want to add content to a page, the first thing you do is open Oracle Composer.

To open a page in Oracle Composer:

1. Log in and go to the page you want to open in Oracle Composer.
2. Go to the page you want to open in Oracle Composer.

3. From the **Page Actions** menu, select **Edit Page** to open Oracle Composer (Figure 10–5).

Figure 10–5 Edit Page Command on the Page Actions Menu



Note: If the **Edit Page** command is not available on the **Page Actions** menu or the **Page Actions** menu does not appear, it is likely that you do not have sufficient page access privileges. If this is the case, ask your application administrator for the privilege to edit pages. For information, see Section 2.8, "Contacting Your Application Administrator."

10.1.2.2 Opening and Closing the Oracle Composer Catalog

All of the components you can add to a page at runtime are located in the Oracle Composer Catalog. Many of the procedures in this chapter require that you open the Catalog. This section describes how.

To open and close the Oracle Composer Catalog:

1. Open a page in Oracle Composer.

   For more information, see Section 10.1.2.1, "Opening a Page in Oracle Composer."

2. Click the **Add Content** button on the region in which to add content (Figure 10–6) to open the Catalog (Figure 10–7).

Figure 10–6 Add Content Buttons in Oracle Composer (Click One)

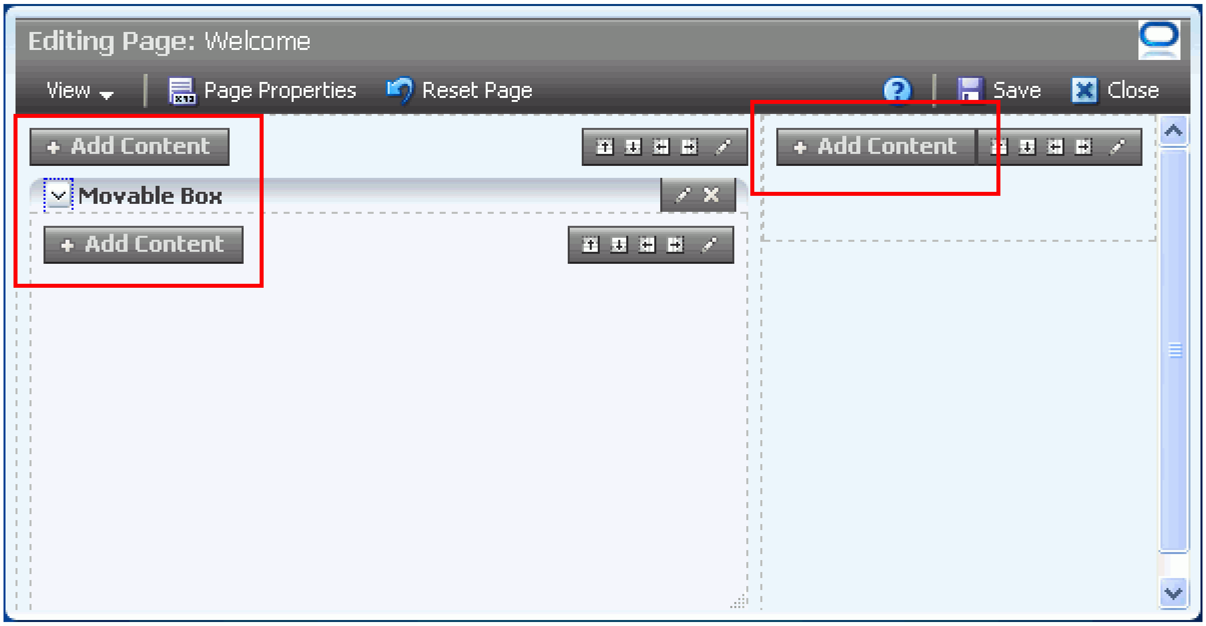
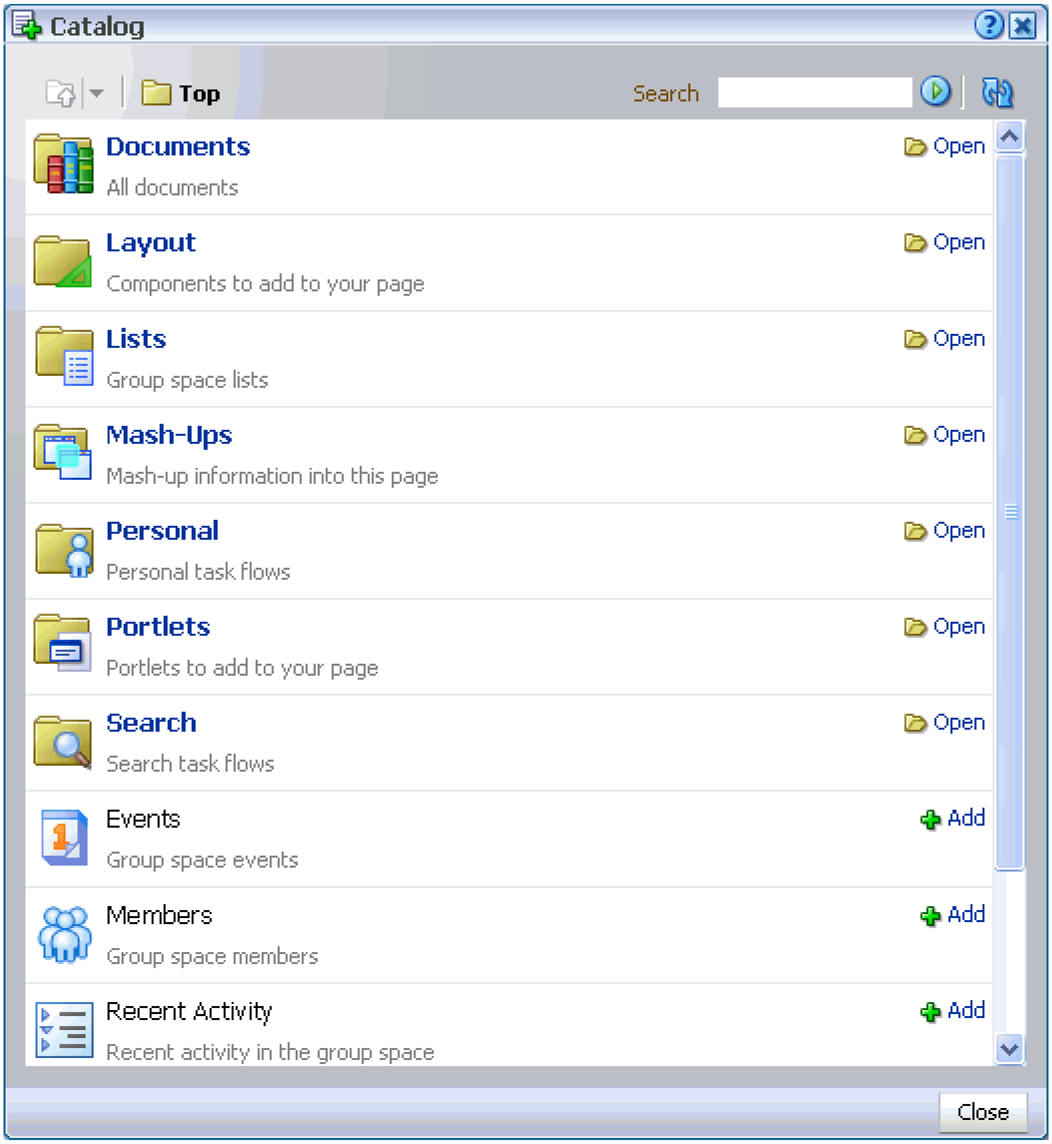


Figure 10–7 The Oracle Composer Catalog in WebCenter Spaces



Note: When the Catalog is open, the page goes gray, and you cannot perform any other actions on the page until you close the Catalog.

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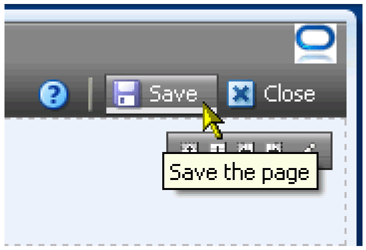
3. Make one or multiple selections.
4. Click **Close** to exit the Catalog.

10.1.2.3 Exiting Oracle Composer

To exit Oracle Composer:

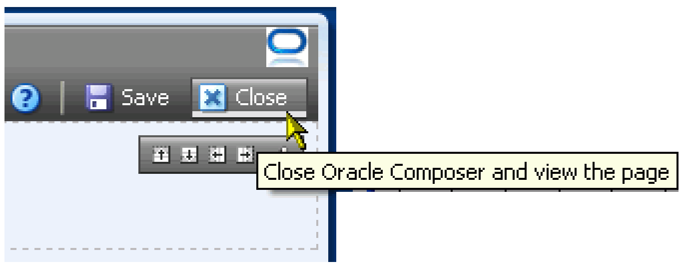
1. Click the **Save** button in Oracle Composer to save your changes (Figure 10–8).

Figure 10–8 The Save Button



2. Optionally, click the **Close** button to exit Oracle Composer (Figure 10–9).

Figure 10–9 The Close Button



10.1.3 Adding Documents to a Page

You can add content from a content repository to an application page to expose an individual file, a folder and its files, a list of folders, a list of files, or content in predefined templates. This section describes how to add individual files to a page. To add files and folders that include file management capabilities, or to upload files and folders, you must use the Documents service (for more information, see Section 18.4, "Working with the Documents Service Task Flows").

Note: When you add a component to a page, you must wait for the application status indicator to finish processing before taking additional action.

To add an individual file to a page:

1. Go to the page where you want to add a file or folder, and open Oracle Composer.

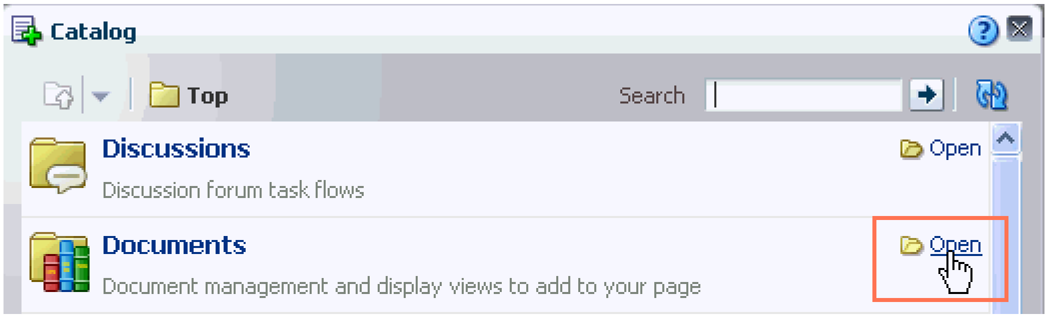
   For more information, see Section 10.1.2.1, "Opening a Page in Oracle Composer."

2. Click the **Add Content** button to open the Oracle Composer Catalog.

   For more information, see Section 10.1.2.2, "Opening and Closing the Oracle Composer Catalog.".

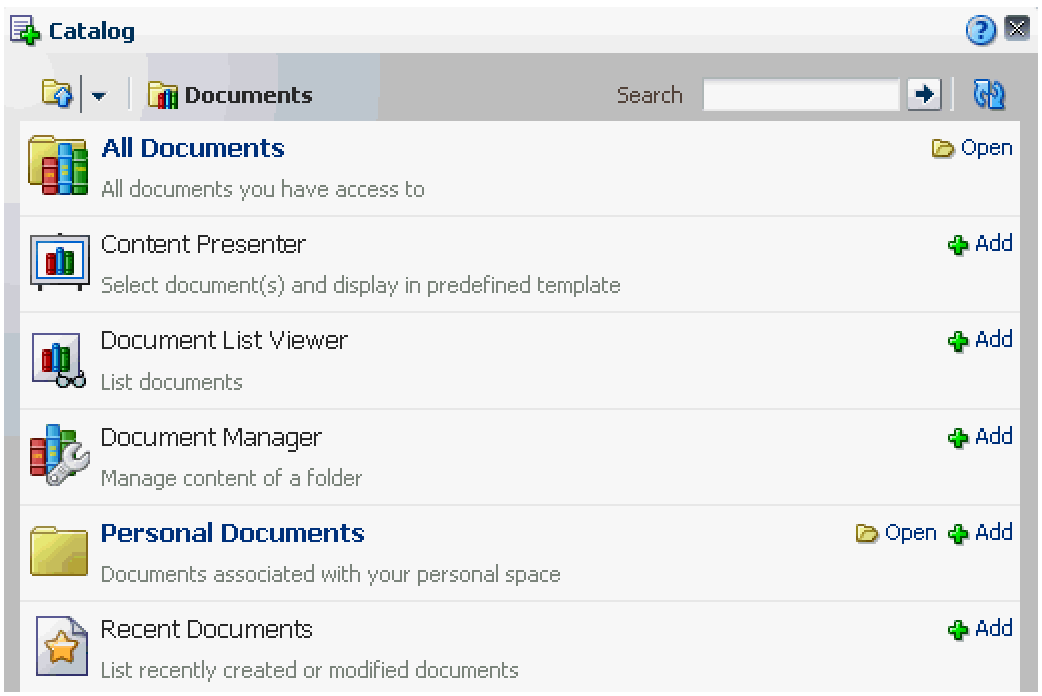
3. Click the **Open** link next to **Documents** (Figure 10–10).

Figure 10–10 The Open Link Next to Documents in the Oracle Composer Catalog



The content of the **Documents** folder appears (Figure 10–11).

Figure 10–11 The Content of the Documents Folder in the Oracle Composer Catalog



Note: When you drill into the Documents folder, you are actually drilling into the live connection with the content repository. The documents you see in the content **Catalog** are not static resources, but reflect the latest status of files and folders in the content repository associated with your enterprise application.

Users of custom WebCenter applications see similar types of components.

---

4. The next link you click depends on your current location in the application:

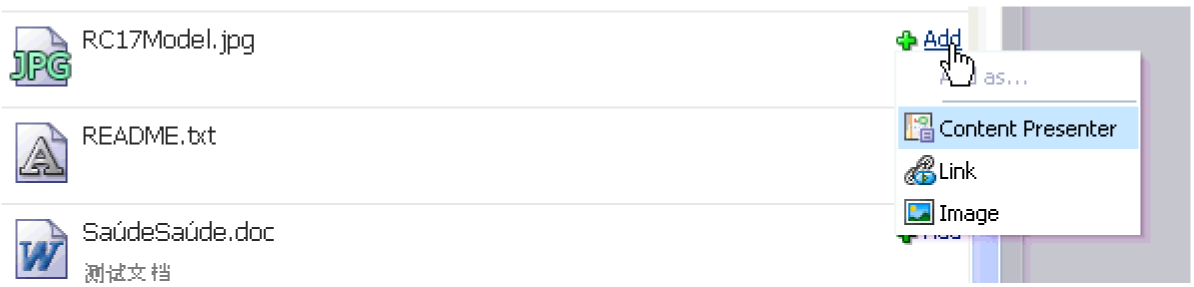
- In a custom WebCenter application, or in a group or personal space in WebCenter Spaces, click **All Documents** to access all documents to which you have access.

- In a WebCenter Spaces group space, click **Group Space Documents**, which provides a shortcut to a list of all of the files and folders to which you have access in the current group space.
- In a WebCenter Spaces personal space, click **Personal Documents**, which provides a shortcut to a list of all the files and folders to which you have access in your personal space.

If necessary, continue to drill into the **Documents** folder until you arrive at the file you want to add to the page.

5. Click the **Add** link next to the file you want to add to the page (Figure 10–12).

Figure 10–12 Add Link Next to an Image File in the Oracle Composer Catalog



6. In the menu that displays, choose how you want to display the file. The file type dictates the choices available to you on the menu:
   - **Content Presenter** displays the file in the Content Presenter task flow. This choice is available for all file types. See Section 18.1.4, "Understanding the Content Presenter Task Flow".
   - **Link** displays the file name as a link on the page. This choice is available for all file types.
   - **Inline Frame** displays the file content on the page. This choice is available for HTML and TXT types.
   - **Image** displays the file as an image on the page. This choice is available for image file types (such as JPG, PNG, and GIF).

   Note: An image from a content repository is different from an Image layout component. For example, you click an **Add** button to add an image from a content repository. You click an **Add** button and then specify an image location for an Image layout component. Additionally, the Image layout component includes a `Destination URI` property, which you can use to specify a link that executes when users click the image. For more information, see Section 9.1.4, "The Image Layout Component."

   ---

7. Save your changes, and exit Oracle Composer.

   For more information, see Section 10.1.2.3, "Exiting Oracle Composer."

10.1.4 Adding Task Flows to a Page

WebCenter Spaces exposes its collaborative, social networking, and personal productivity features through *services*, which, in turn, expose subsets of their features and functionality through *task flows*. Services provide a wide variety of functionality in support of personal and team objectives. Task flows provide reusable functionality that may expose all or a subset of the features available from a particular service. For more information about services and task flows, see Section 1.2, "Introducing WebCenter Services."

The different task flows of a particular service can range from offering all of the service's features to a subset of those features. For example, the Documents service provides multiple task flows that each provide a different view of your content repository back end and different subsets of the repository's features. One task flow allows for the creation and display of files and folders; another simply lets you view and access files. For more information, see Section 18.1.3, "What You Should Know About the Documents Service Task Flows."

Note: When you add a component to a page, you must wait for the application status indicator to finish processing before taking additional action.

See Also: In addition to task flows, you can place a file from a Document Library directly onto a page. How that file is rendered depends on the file's type (for more information, see Section 10.1.3, "Adding Documents to a Page").

You can create more dynamic pages by wiring task flows to portlets, UI components, and other task flows using contextual events. Wire different combinations of components to create your own enterprise mashups. For more information, see Chapter 11, "Wiring Pages, Task Flows, Portlets, and UI Components."

To add a task flow to a page:

1. Go to the page where you want to add a task flow, and open it in Oracle Composer.

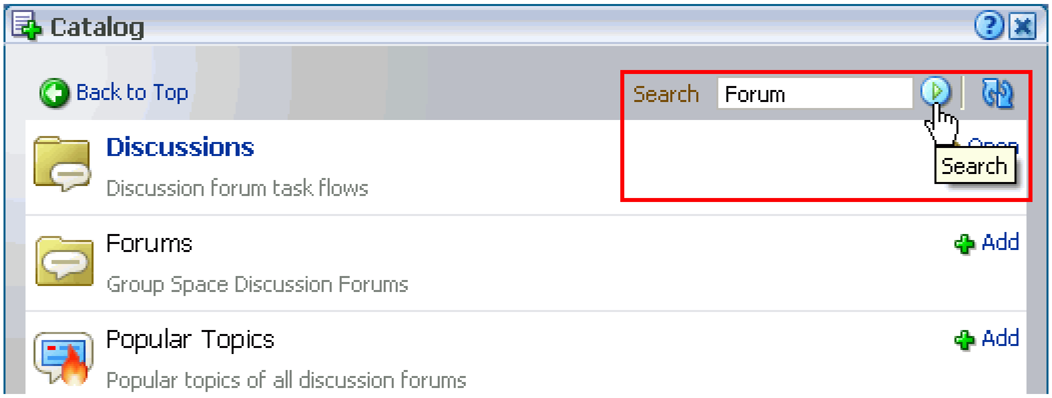
   For more information, see Section 10.1.2.1, "Opening a Page in Oracle Composer."

2. In Oracle Composer, click the **Add Content** button to open the Oracle Composer Catalog.

   For information about the resources in the Oracle Composer Catalog, see Table 6–2, " Oracle Composer Catalog Resources".

3. Optionally, use the Catalog **Search** feature to locate the task flow of interest (Figure 10–13).

Figure 10–13 Catalog Search Feature



4. Click the **Add** link next to the task flow of interest, or drill to the task flow by clicking the **Open** link next to the folder that contains it.
5. Optionally, continue to add task flows in this way.
6. Click **Close** to close the Catalog.
7. Save your changes, and exit Oracle Composer.

   For more information, see Section 10.1.2.3, "Exiting Oracle Composer."

Adding a task flow is often just the first step in getting the content you want on your page. Many task flows have unique properties that take values that determine task flow content. For more information, see Section 10.4, "Setting Properties on Page Content."

10.1.5 Adding Portlets to a Page

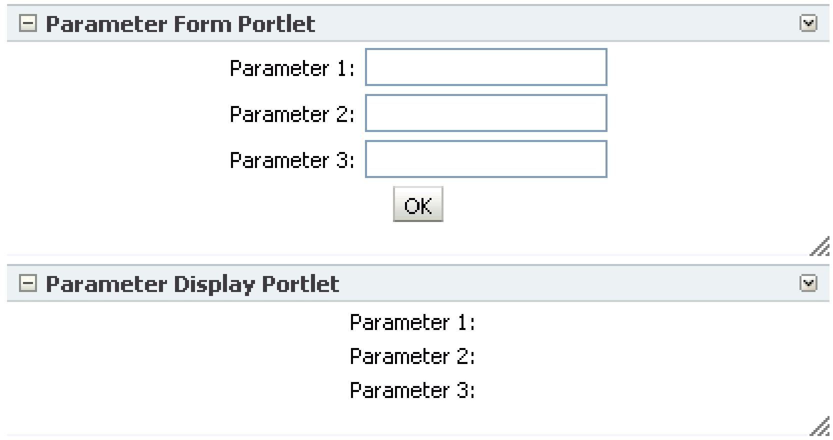
In addition to task flows and layout components, the Oracle Composer Catalog provides access to all the portlets your application administrator has integrated with your WebCenter application. This section provides information about portlets, describes how to place them on a page, and how to manage them after they are placed. It contains the following subsections:

- Section 10.1.5.1, "Introducing Portlets"
- Section 10.1.5.2, "Adding a Portlet to a Page"

10.1.5.1 Introducing Portlets

Portlets offer functionality like task flows, and they look like any other task flow when you place them on a WebCenter application page (Figure 10–14).

Figure 10–14 Parameter Form and Display Portlets



One difference between portlets and task flows is that portlets are provided by applications rather than services. Central to the purpose of portlets is to provide a standard way for applications to integrate with other applications.

> **Note:** Before you can access portlets in the Catalog, your application administrator must register the portlet's producer with your WebCenter application. For more information, see the "Managing Portlet Producers" chapter in the *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter*.

You can create more dynamic sets of pages by wiring portlets to other portlets and to pages using page parameters and contextual events. Use different portlets in combination to create your own enterprise mashups. For more information, see Chapter 11, "Wiring Pages, Task Flows, Portlets, and UI Components."

> **See Also:** For more information about portlets, see Chapter 32, "What You Should Know About Portlets."

10.1.5.2 Adding a Portlet to a Page

At runtime, you can add portlets to any WebCenter Spaces page on which you have sufficient access. This section describes how.

> **Note:** When you add a component to a page, you must wait for the application status indicator to finish processing before taking additional action.

To add a portlet to a page:

1. Go to the page where you want to add a portlet, and open it in Oracle Composer.

   For more information, see Section 10.1.2.1, "Opening a Page in Oracle Composer."

2. Click the **Add Content** button associated with the location where you want to place the portlet to open the Oracle Composer Catalog.

   For more information, see Section 10.1.2.2, "Opening and Closing the Oracle Composer Catalog."

3. Click the **Add** link next to the portlet of interest, or drill to the portlet by clicking the **Open** link next to the folder that contains the portlet.
4. Optionally, continue to add portlets in this way.
5. Click the **Close** button to close the Catalog.
6. Save your changes, and exit Oracle Composer.

   For more information, see Section 10.1.2.3, "Exiting Oracle Composer."

Adding a portlet is often just the first step in getting the content you want on your page. Many portlets have unique properties that take values that determine the portlet content. For more information, see the following sections and chapters:

- Section 10.4, "Setting Properties on Page Content"
- Chapter 11, "Wiring Pages, Task Flows, Portlets, and UI Components"

10.1.6 Embedding Video, Music, Slides, and Other Types of Content

You can use the HTML Markup layout component to expose video, music, Google Gadgets, and other types of content in your application pages. This section describes how.

> **Note:** When you add a component to a page, you must wait for the application status indicator to finish processing before taking additional action.

To embed different types of media on an application page:

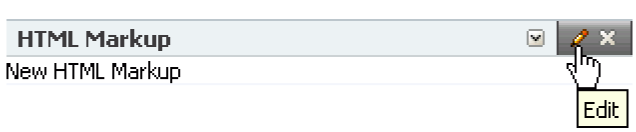
1. Copy the link location of the content you want to embed.
2. Go to the page where you want to embed video, music, or some other type of medium, and open Oracle Composer.

   For more information, see Section 10.1.2.1, "Opening a Page in Oracle Composer."
3. Click the **Add Content** button associated with the location where you want to embed content to open the Oracle Composer Catalog.

   For more information, see Section 10.1.2.2, "Opening and Closing the Oracle Composer Catalog."
4. Click the **Open** link next to **Layout**, and then click the **Add** link next to **HTML Markup**.

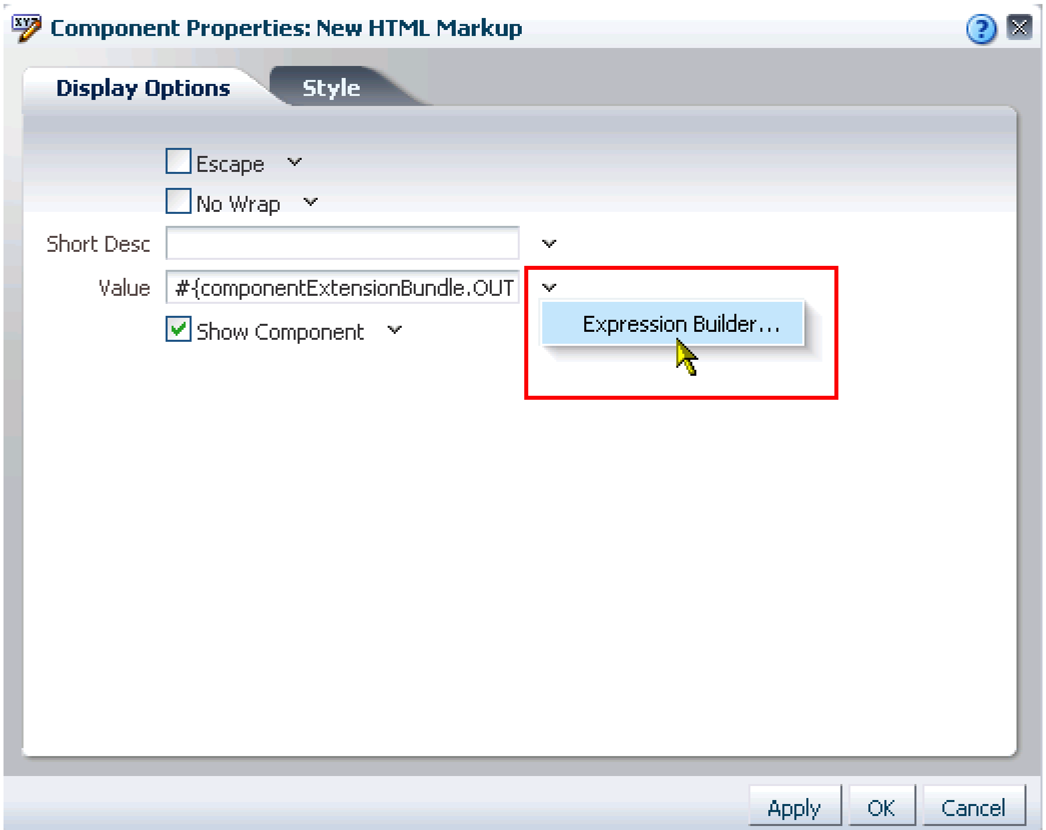
   Optionally, use the Catalog **Search** feature to locate the layout component, and then click the **Add** link next to **HTML Markup**.
5. Click the **Close** button to close the Catalog.
6. Click the **Edit** icon on the HTML Markup component (Figure 10–15).

Figure 10–15 Edit Icon on an HTML Markup Header



7. In the resulting Component Properties dialog, click the **Display Options** tab to bring it forward, and then click the icon next to the **Value** field and select **Expression Builder** (Figure 10–16).

Figure 10–16 Edit Icon Next to the Value Field



8. In the Expression Builder, select **Type a value or expression**, and then paste the link you copied in step 1 (Figure 10–17).

Figure 10–17 Link Pasted Into EL Editor

9. Click **OK** to close the Expression Builder.

10. Click **OK** to close the Component Properties dialog.
11. Save your changes, and exit Oracle Composer.

10.2 Customizing and Personalizing Page Content

The runtime flexibility of your WebCenter application is realized in both *customization* and *personalization*. Customization involves changes made in page *edit* mode. Customizations affect all users' views of a page. Personalization involves changes made in page *view* mode. Personalizations affect only your view of a page.

Note: When you revise a component in page view mode (personalization) while another user deletes the same component in page edit mode (customization), 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.

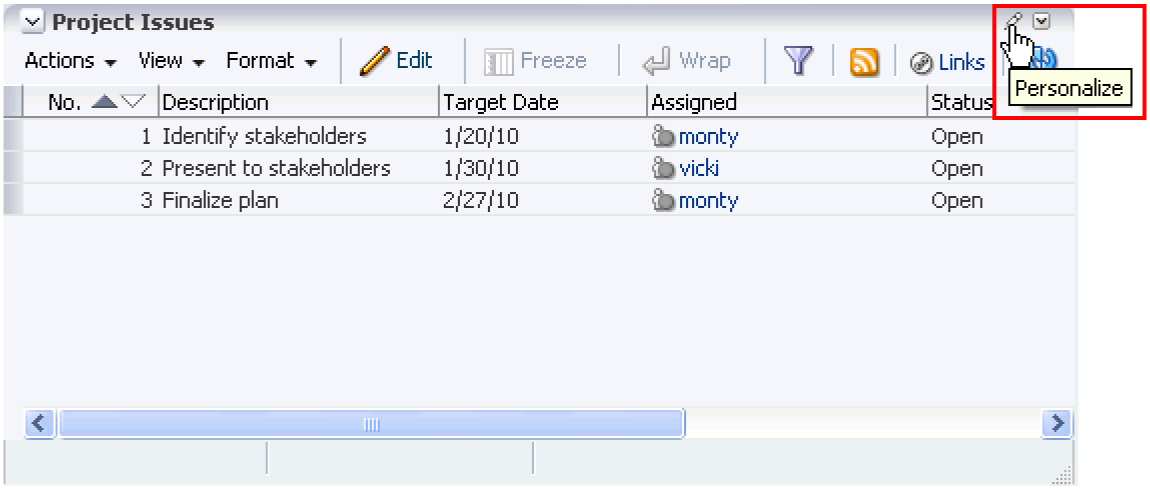
In page edit mode, you see only customizations. In page view mode, you see your personalizations layered over customizations. If the same property is set in both customization and personalization, the personalized value takes precedence (in your view of a page in page view mode). For example, imagine a List task flow that an authorized user has customized to display color banding every other column. In your page view, you personalize the list to instead show color banding every other row. As you toggle between page edit mode and page view mode, you see column color banding in page edit mode, but your own row color banding in page view mode.

You can make customizations and personalizations at the page level and at the component level. Page-level customizations and personalizations include such actions as rearranging page content, changing the page layout, and the like. Component customizations and personalizations—made to task flows, portlets, and layout components—include such actions as resizing and rearranging columns and filtering content. Through the **Child Components** tab in the Component Properties dialog, you can also perform page-like personalizations at the component level. For example, you can rearrange, hide, and show page content. For more information, see Section 10.4.6, "Working with Child Components." The types of personalizations available to components differ from component to component.

Note: Customizations made directly to service task flows and to portlets are committed immediately, regardless of whether you click the **Save** button in Oracle Composer. These types of customizations include entering page edit mode and resizing a list column, adding color banding, sorting discussion forums, and the like. They do not include changes made through the Component Properties dialog, which must be saved before they are committed.

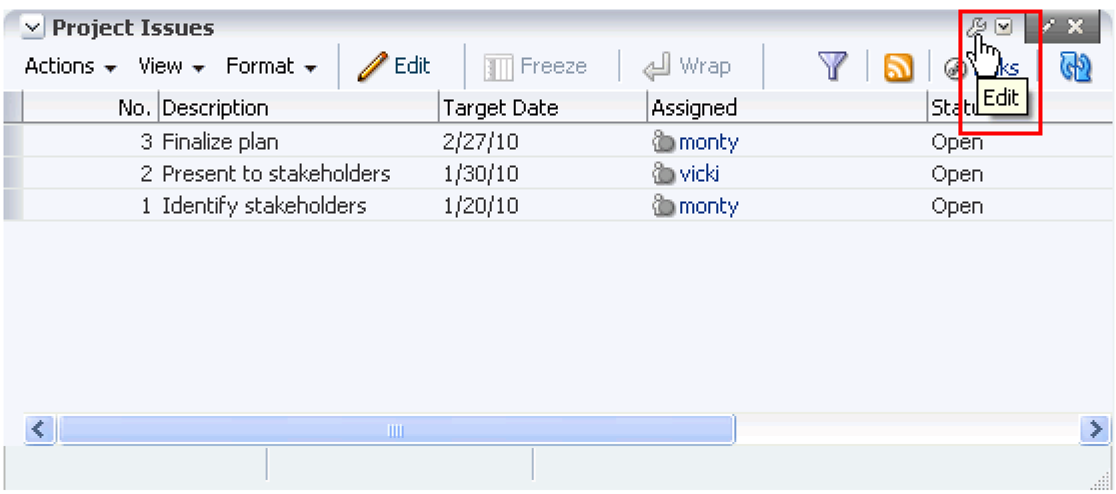
Page personalization is available to users with, minimally, personalize permission on the page. Provided the component supports it, some personalization settings are available through the **Personalize** icon that appears on the component header in page view mode (Figure 10–18).

Figure 10–18 Personalize Icon on a Component Header in WebCenter Spaces



Page customization is available to users with, minimally, edit permission on the page. Provided the component supports it, some customization settings are available through the **Edit** icon that appears in the component header or on a floating tool palette when the component's host page is opened in Oracle Composer (Figure 10–19).

Figure 10–19 The Edit Icon on a List Task Flow (WebCenter Spaces Only)



See Also: For information about Oracle Composer (customization), see Section 6.2, "Introducing Oracle Composer."

For more information about page personalization, see Section 4.2, "Personalizing Your Page View."

For more information about customizations and personalizations available to specific components, see the chapters on specific services and portlets:

- Part IV, "Services A Through N"
- Part V, "Services P Through W"
- Part VI, "Working with Portlets"

10.3 Deleting Page Content

You can remove content in your own page view (personalization), and you can remove it from all users' page views (customization).

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

When you delete a component, any children of that component are also deleted. For example, if you delete a layout Box, any content within that Box is also deleted. This section describes deleting components from everyone's page view, that is, deleting components as a page customization. For information on removing a component from your own view, see Section 4.2.3, "Removing Components from Your View of a Page."

See Also: For information about personalization and customization, see Section 10.2, "Customizing and Personalizing Page Content."

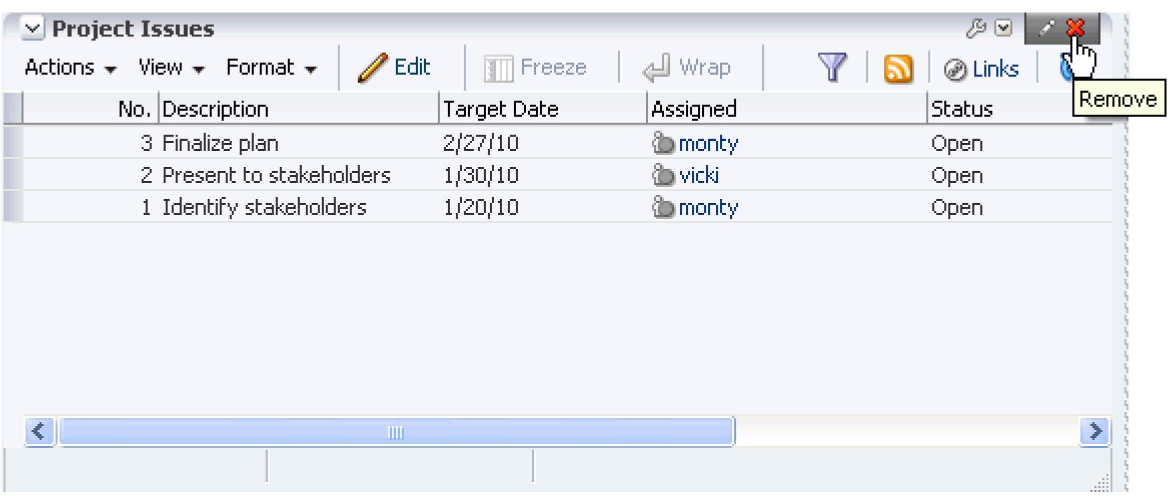
To delete page content:

1. Go to the page where you want to delete page content, and open Oracle Composer.

   For more information, see Section 10.1.2.1, "Opening a Page in Oracle Composer."

2. Click the **Remove** icon on the component header (Figure 10–20) or on the component's floating tool palette.

Figure 10–20 Remove Icon on a Component Header



3. Click the **Delete** button in the resulting confirmation dialog.

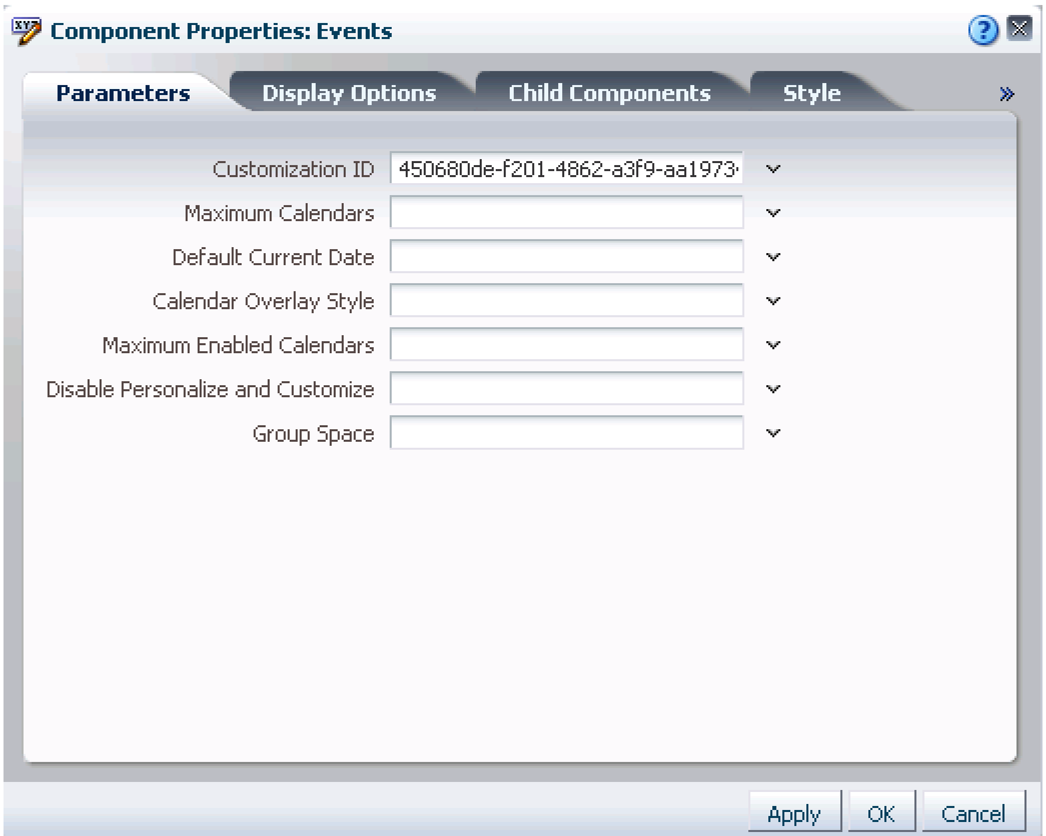
   The selected component and all its child components are deleted from the application page.

4. Save your changes, and exit Oracle Composer.

10.4 Setting Properties on Page Content

Components, such as task flows and portlets, and UI components, such as buttons, boxes, and images, carry with them a set of configurable properties that control the appearance and behavior of a particular component instance. Such properties are exposed in Oracle Composer through its Component Properties dialog (Figure 10–21).

Figure 10–21 Component Properties Dialog



Components of all types share many properties in common. Typically, individuality is expressed on the **Parameters** and **Events** tabs, though there may be variations on **Display Options**, **Style**, and **Content Style** tabs.

> **Tip:** In this guide, properties that are unique to a particular component are discussed in the chapters that cover individual services, portlets, and layout components. For more information, see:
>
> - Chapter 9, "Working with Page Layout Components"
> - Part IV, "Services A Through N"
> - Part V, "Services P Through W"
> - Part VI, "Working with Portlets"

This section discusses commonly-shared properties. It contains the following subsections:

- Section 10.4.1, "What You Should Know About Component Properties"

- Section 10.4.2, "Setting Component Properties"
- Section 10.4.3, "Working with Component Parameters"
- Section 10.4.4, "Working with Component Display Options"
- Section 10.4.5, "Using Expression Language (EL) Expressions with Component Properties"
- Section 10.4.6, "Working with Child Components"
- Section 10.4.7, "Working with Style and Content Style Properties"
- Section 10.4.8, "Working with Component Contextual Events"

> **See Also:** For information about page parameters, see Section 11.3, "Wiring Components and Page Parameters."

10.4.1 What You Should Know About Component Properties

Application components have associated properties, which users with sufficient privileges can access through the Oracle Composer Component Properties dialog. Use properties to adjust the appearance and behavior of a component instance and to wire components to each other and to page parameters and page definition variables.

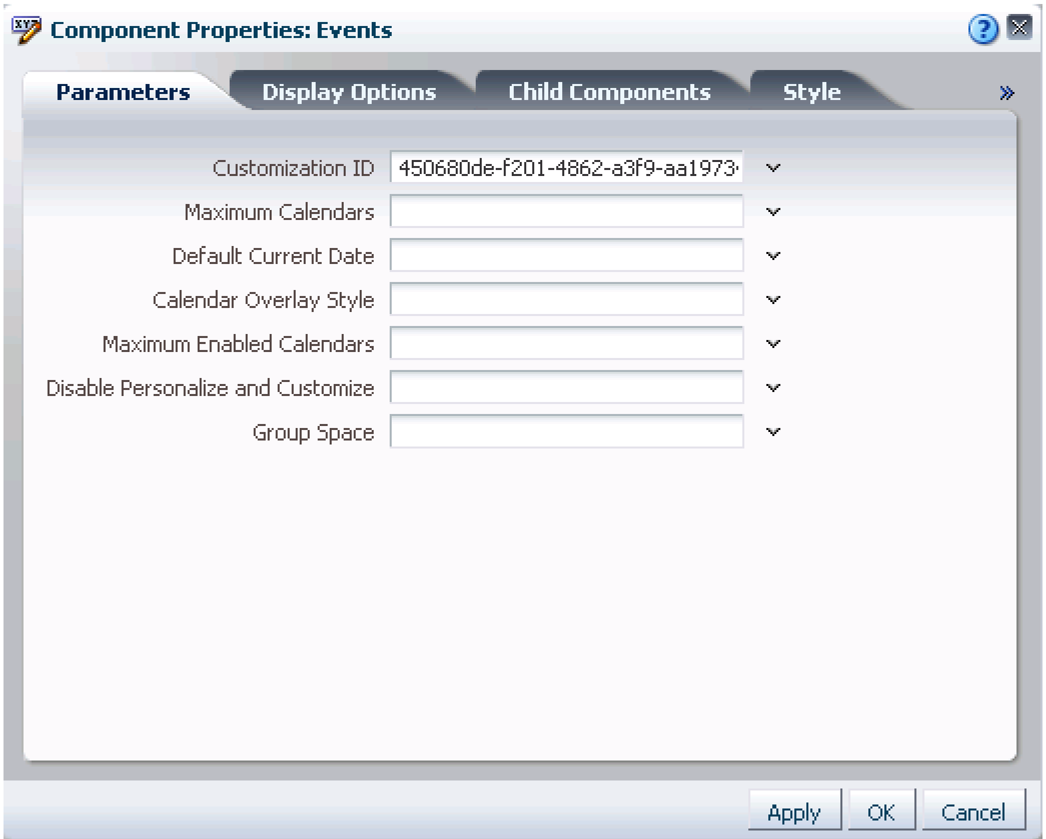
> **See Also:** For information about wiring pages and components, see Chapter 11, "Wiring Pages, Task Flows, Portlets, and UI Components."

To access component properties, edit the page and click the **Edit** icon associated with a particular component instance (Figure 10–22).

Figure 10–22 Edit Icon on a Component Instance in Oracle Composer

The component's properties appear in the Oracle Composer Component Properties dialog (Figure 10–23).

Figure 10–23 Oracle Composer Component Properties Dialog



The Component Properties dialog is divided into multiple tabs. These can include all of the following tabs, but more likely include a subset of them:

- **Parameters**—Settings, unique to the component type, that can control such things as the source of the component's content. For more information, see Section 10.4.3, "Working with Component Parameters."
- **Display Options**—Settings for determining content orientation, hiding and showing a header, selecting a display method for an actions menu, and the like. For more information, see Section 10.4.4, "Working with Component Display Options."
- **Child Components**—A list of all the components contained in the parent component. For more information, see Section 10.4.6, "Working with Child Components."
- **Style**—Font, color, and dimension settings that override such values on the parent component, the page, and the application. Style values affect component content and the elements that surround the content. For more information, see Section 10.4.7, "Working with Style and Content Style Properties."
- **Content Style**—Font, color, and dimension settings on component content that override such values specified for **Style**. For more information, see Section 10.4.7, "Working with Style and Content Style Properties."
- **Events**—Contextual events and event handlers for all the components on the current page that can be consumed by the currently selected component. Events are defined occurrences within the current context, and event handlers are the

engines that drive the results of that occurrence. For more information, see Section 10.4.8, "Working with Component Contextual Events."

Some components include settings in all of these sections. Other components include a subset of these sections.

10.4.2 Setting Component Properties

The steps outlined in this section are useful for all selectable components on an application page.

Note: When you enter most types of property values in the Component Properties dialog and then click **Apply**, the dialog remains open. With values other than expected value types, the dialog closes, and the page is refreshed to reflect the new value.

Expected values types include a string or an array of strings, where the component expects a value of type `java.lang.String[]`, and primitive values, such as integer, Boolean, float, double, and short.

To set component properties:

1. Go to the page where you want to configure component properties, and open Oracle Composer.

   For more information, see Section 10.1.2.1, "Opening a Page in Oracle Composer."

2. Click the **Edit** icon (the pencil) on the component of interest (Figure 10–24) to open the Component Properties dialog (Figure 10–25).

Figure 10–24 Edit Icon on a Component Header in WebCenter Spaces

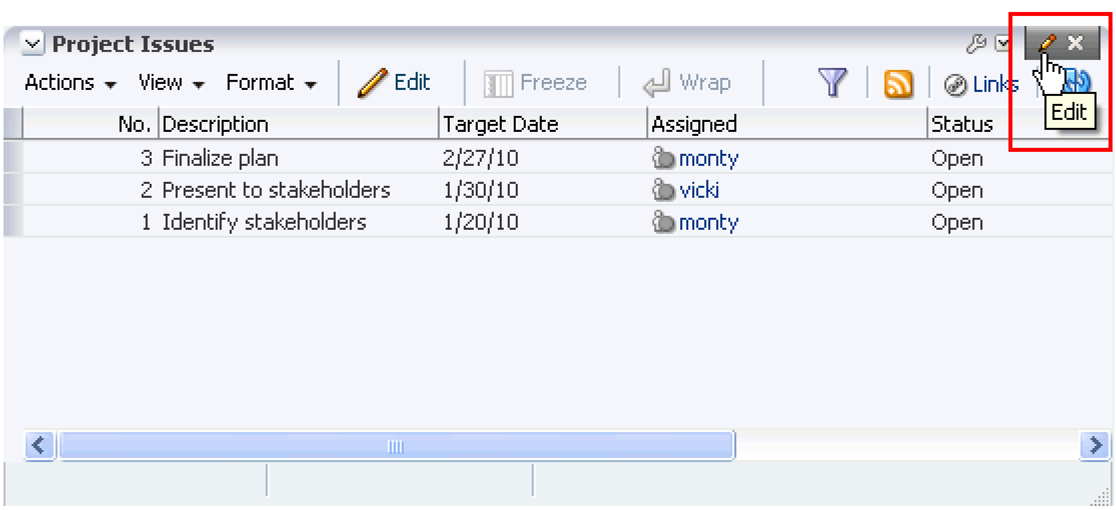
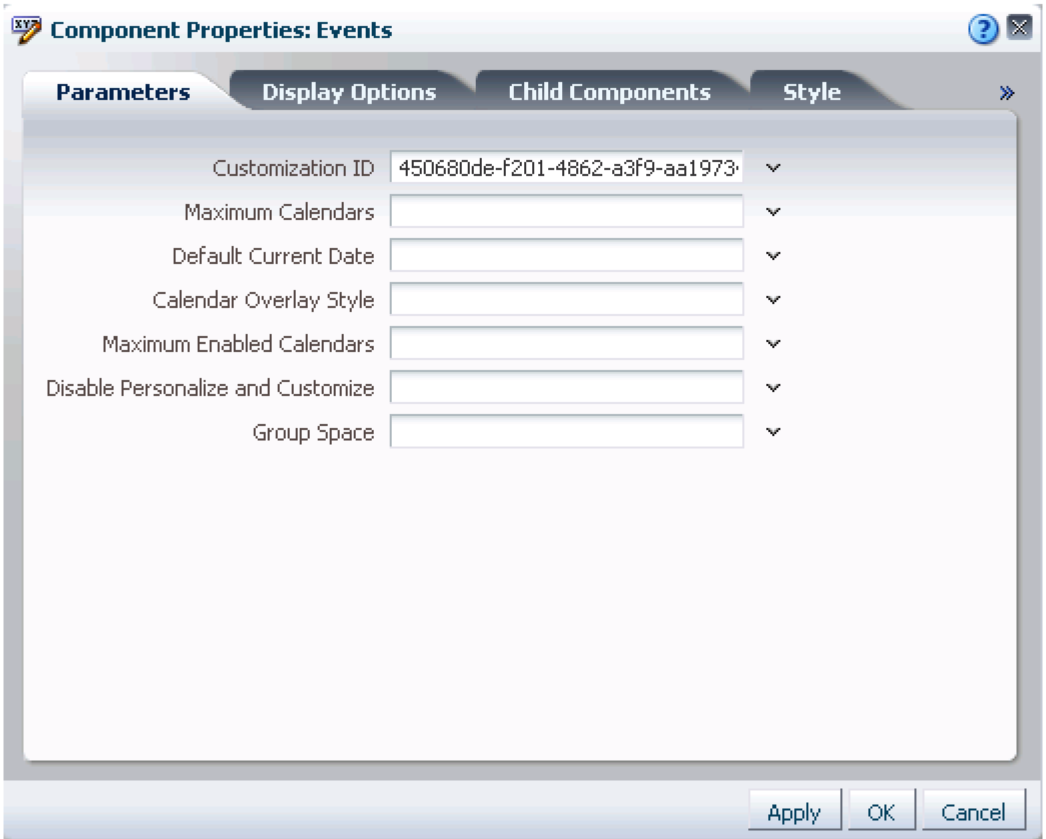


Figure 10–25 Component Properties Dialog



Enter Parameter and Display Option values either unwrapped or wrapped in Expression Language syntax; for example, `value` or `#{value}`.

> **Tip:** For information about component properties and the types of values they require, see:
>
> - Section 10.4.3, "Working with Component Parameters"
> - Section 10.4.4, "Working with Component Display Options"
> - Section 10.4.6, "Working with Child Components"
> - Section 10.4.7, "Working with Style and Content Style Properties"
> - Section 10.4.8, "Working with Component Contextual Events"

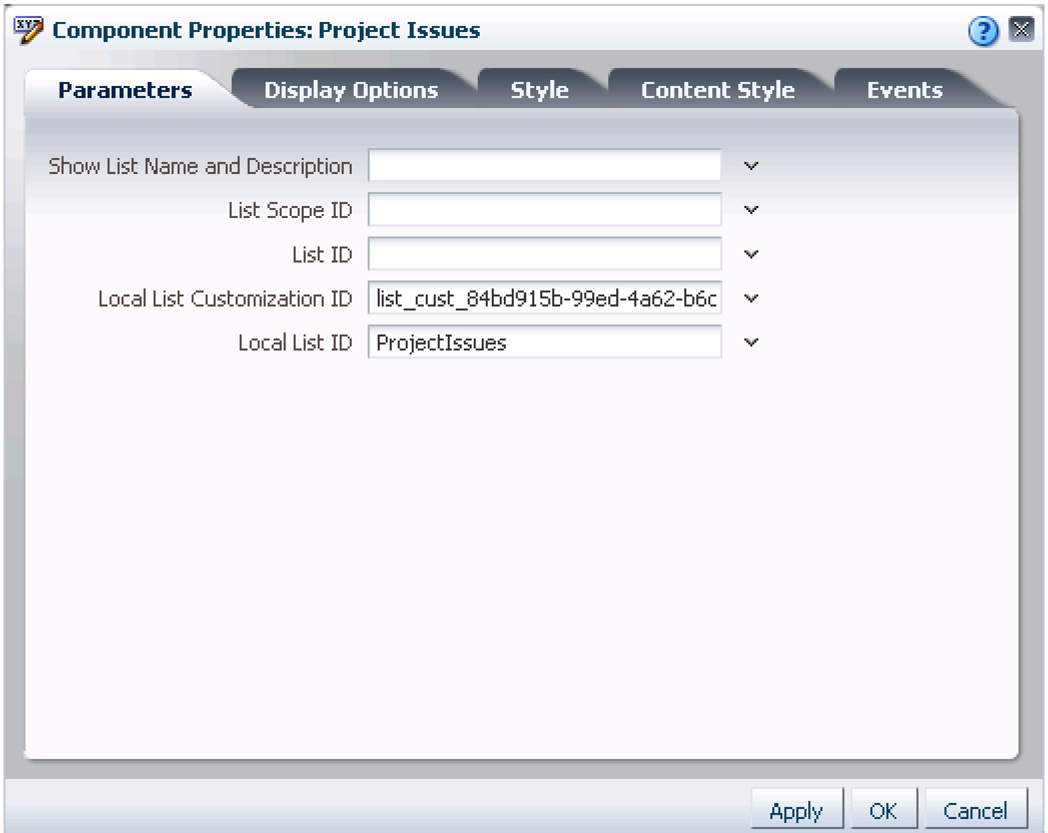
3. When you finish revising component properties, click **OK**.
4. Save your changes, and exit Oracle Composer.

> **Note:** When you encounter errors in page edit mode in the WebCenter Spaces application and in custom WebCenter applications where the sandbox is enabled, you can recover by closing your browser and then reopening it and relogging in to the application instance.

10.4.3 Working with Component Parameters

Component parameters appear on the **Parameters** tab of the Component Properties dialog (Figure 10–26).

Figure 10–26 Parameters Tab in the Component Properties Dialog

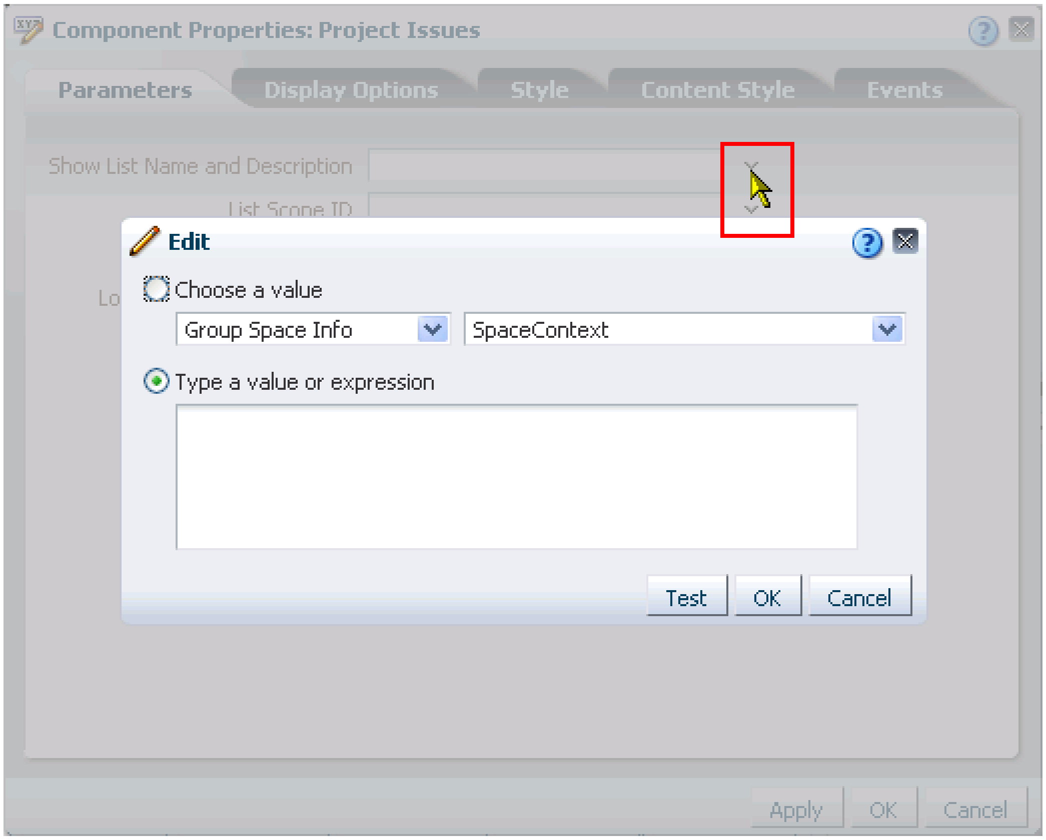


Component parameters vary from component to component. For example, on some components they provide the opportunity to specify the source and range of task flow content; on other components they present read-only, application-generated identifiers that are used in maintaining a task flow instance's association with its customizations.

> **Tip:** Parameters that require a value are marked with an asterisk.

Enter parameter values, or click the icon next to a parameter field to select and open the Expression Builder. (Figure 10–27).

Figure 10–27 Edit Icon Next to a Parameter Value Field and the Resulting Editor



The editor provides a means of entering an expression when a value is retrievable, but otherwise unknown, for example, when you want a parameter value to be the name of the current user or the current application skin.

> **See Also:** For more information about using the editor and for a table of useful EL expressions, see Section 10.4.5, "Using Expression Language (EL) Expressions with Component Properties."

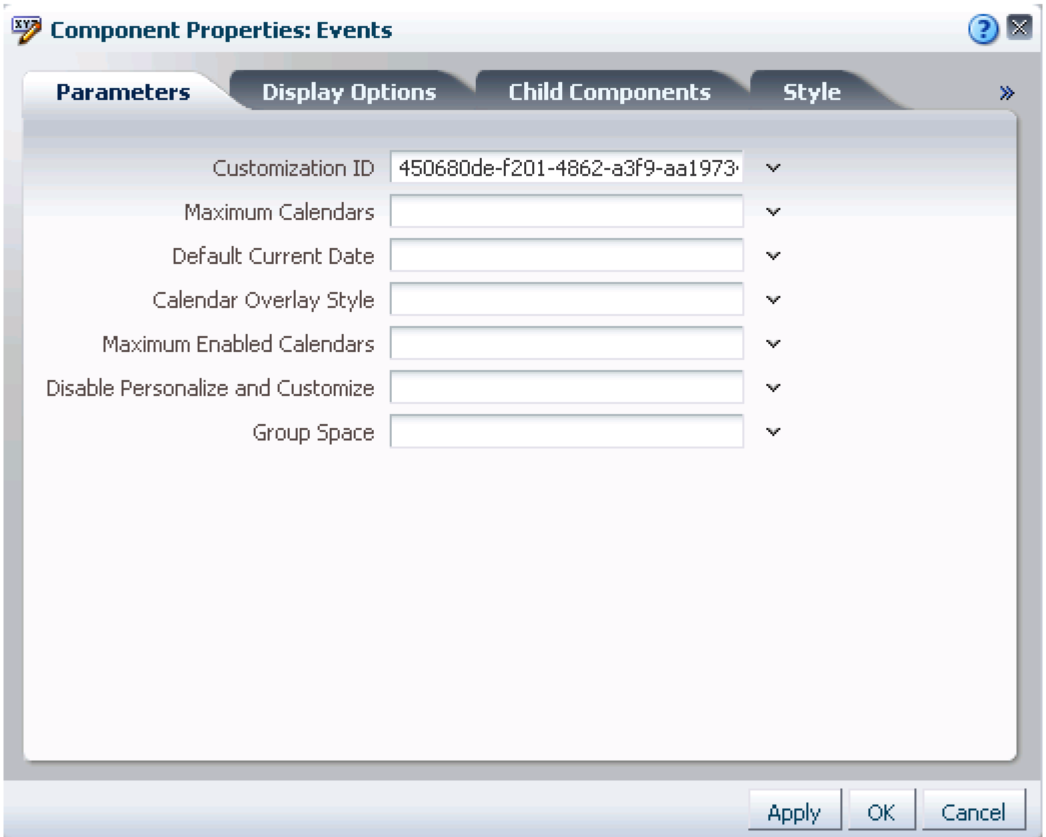
In view of the uniqueness of parameters within a particular service or a particular portlet, parameter details are discussed with their associated services and portlets.

- For information about services and their associated parameters, see Part IV, "Services A Through N" and Part V, "Services P Through W".
- For information about portlets and their associated parameters, see Part VI, "Working with Portlets".
- For information about accessing the Component Properties dialog, see Section 10.4.2, "Setting Component Properties."

10.4.4 Working with Component Display Options

The **Display Options** tab provides access to properties that control a range of display-related behaviors on a given component instance (Figure 10–28).

Figure 10–28 Display Options Tab in the Component Properties Dialog



For example, use the display options on an Image layout component to specify the image source URL and its optional link target. Use the display options on the Announcement Manager task flow to hide or show a header and enable or disable menus and other options on the header.

In addition to the values provided, the Expression Builder is available for entering custom values, such as text strings and Expression Language (EL) expressions (for more information about EL expressions, see Section 10.4.5, "Using Expression Language (EL) Expressions with Component Properties").

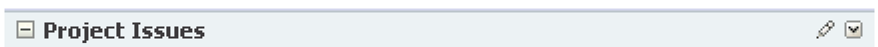
Typically, the **Display Options** tab presents settings that affect the display elements surrounding component content (that is, its chrome). Chrome includes the header, the **Actions** menu, **Expand** and **Collapse** icons, and the like.

Table 10–1 lists and describes the Display Options properties that generally apply to most components (task flows, portlets, and layout components). Where there are variations, they are noted in the chapters covering specific services and task flows (for information about properties associated with specific services, see Part IV, "Services A Through N").

> **See Also:** For information about accessing the Component Properties dialog, see Section 10.4.2, "Setting Component Properties."

Table 10–1 Display Options Properties

<table>
<tr><th>Property</th><th>Description</th></tr>
<tr><td><code>Background</code></td><td>
Select to specify a shade for the component background.
Choose from:
light (light is transparent; the prevailing background color shows through)


medium


dark


</td></tr>
<tr><td><code>Display Actions</code></td><td>
Specify how to show actions on the component instance. Actions include the Remove icon, the Actions menu icon, and the Resizer.
Choose from:

<code>always</code>—Always show actions on the component header.
<code>onHover</code>—Show actions when users hover their mouse pointers over the component header.

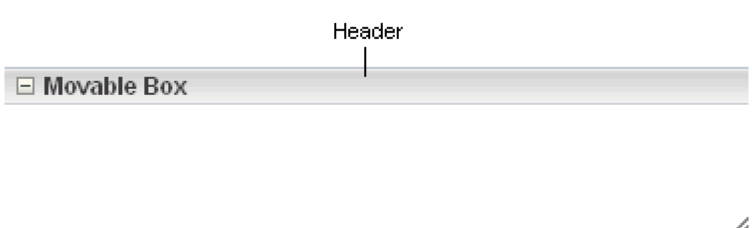
<code>Display Header</code> must be selected for either of these options to fully apply. If a header is not shown:

In page view mode:

<code>always</code>—only the Resizer is shown.
<code>onHover</code>—the Resizer is shown only when users hover their mouse pointers over the component.

In page edit mode:

<code>always</code>—All actions except the Resizer appear on a floating palette. All actions appear only when users hover their mouse pointers over the component.
<code>onHover</code>—Only the Resizer is shown when users hover their mouse pointers over the component.

</td></tr>
<tr><td><code>Display Header</code></td><td>
Select this checkbox to show a header on the component instance. The <code>Display Actions</code> component is affected by the value you specify here. For more information, see <code>Display Actions</code>.


</td></tr>
</table>

Table 10–1 (Cont.) Display Options Properties

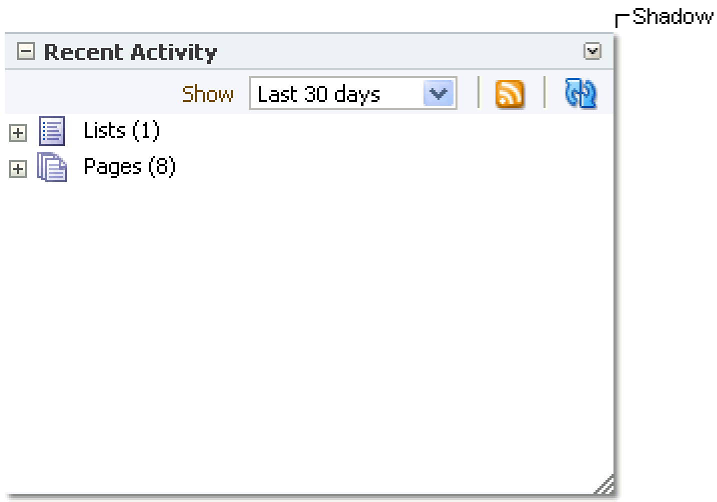
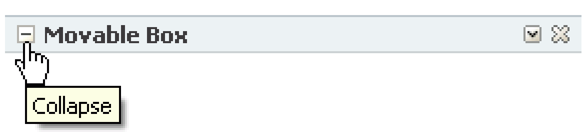
Property	Description
`Display Shadow`	Select to render a shadow behind the component instance. 
`Short Desc`	Provide `ALT` text for the component instance. When users roll their mouse pointers over the component instance, the text you enter here pops up. Note that, for the Web Page component, the `ALT` text appears only when users hover their mouse pointers over the component border. You can improve the ease of this occurrence by increasing, for example, the padding around the component using the `Other CSS` Style property. For example, you can enter the following in the Other CSS text box: `padding-top:30px;` For more information about `Other CSS`, see Section 10.4.7.2, "Entering Other CSS on the Style and Content Style Tabs."
`Show Minimize Action`	Select whether to show the minimize action on the component header (that is, a **Collapse** icon on the component chrome). Choose from: ■ `none`—Do not show the **Collapse** icon. ■ `chrome`—Show the **Collapse** icon on the component header. The minimize action collapses the component like a window shade, showing only its header.  When a component is minimized, the icon toggles to an **Expand** icon, which you can use to restore the full component to view.

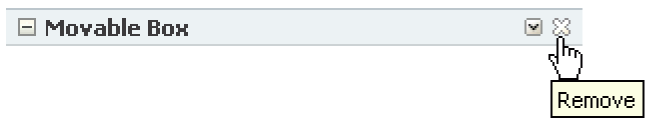
Table 10–1 (Cont.) Display Options Properties

<table>
<tr><th>Property</th><th>Description</th></tr>
<tr><td><code>Show Move Action</code></td><td>Select whether to show Move Up and Move Down (or Move Left and Move Right) options on the component Actions menu. Choose from:

<code>none</code>—Do not show Move options on the Actions menu.
<code>menu</code>—Show Move options on the Actions menu.

Move options include Move Up, Move Down, or Move Left, Move Right, depending on the orientation of the parent container (horizontal or vertical). Move options are context sensitive. For example, in a vertically-oriented parent container if there are no components above the current task flow the Move Up option does not appear on the Actions menu.</td></tr>
<tr><td><code>Show Remove Action</code></td><td>Select whether to show the Remove icon on the component header (that is, the component chrome). Choose from:

<code>none</code>—Do not show the Remove icon on the component chrome.
<code>chrome</code>—Show the Remove icon on the component chrome.



Note that after you select to remove a component in this way in page view mode, you can restore it using the following methods:

Select the Reset Layout command from the Page Actions menu. Reset Layout removes all page personalizations, so any component removed during a page personalization is restored.
Edit the page, and add another component instance.
</td></tr>
<tr><td><code>Show Resizer</code></td><td>Select whether to show a window resizer on a component instance. The window resizer enables you to increase the component height.
Choose from:

<code>always</code>—Always show the window resizer.
<code>never</code>—Never show the window resizer.

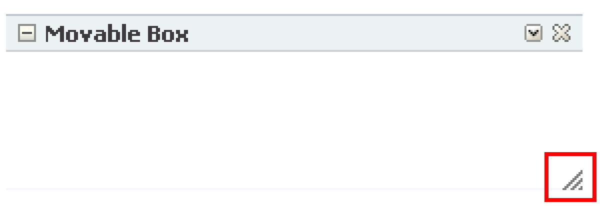

</td></tr>
</table>

Table 10–1 (Cont.) Display Options Properties

Property	Description
`Stretch Content`	Select to stretch the content to fill the container. For example, all task flows and portlets are wrapped in a container. If you change the height of the container, through the Content Style `Height` property, `Stretch Content` specifies that the component should be stretched to fill the specified height. Content always takes up the full width of its parent container.
`Text`	Enter text to appear in the component header. If you select to hide the header, the value you enter here is ignored.
`Show Component`	Option for hiding or showing the component instance on the application page ■ Select to show the component. ■ Clear to hide the component. Once you hide a component in this way, you can show it again using controls available in Oracle Composer Source view. In Source view, right-click the hidden component, and select Show Component from the resulting context menu.

10.4.5 Using Expression Language (EL) Expressions with Component Properties

When configuring page components, you can express values as variables that take advantage of the current application context by grabbing information that happens to be true at the moment. All of this is possible in light of the Expression Builder provided with each Parameter and Display Option property.

This section provides information about the editor and useful EL expressions. It contains the following subsections:

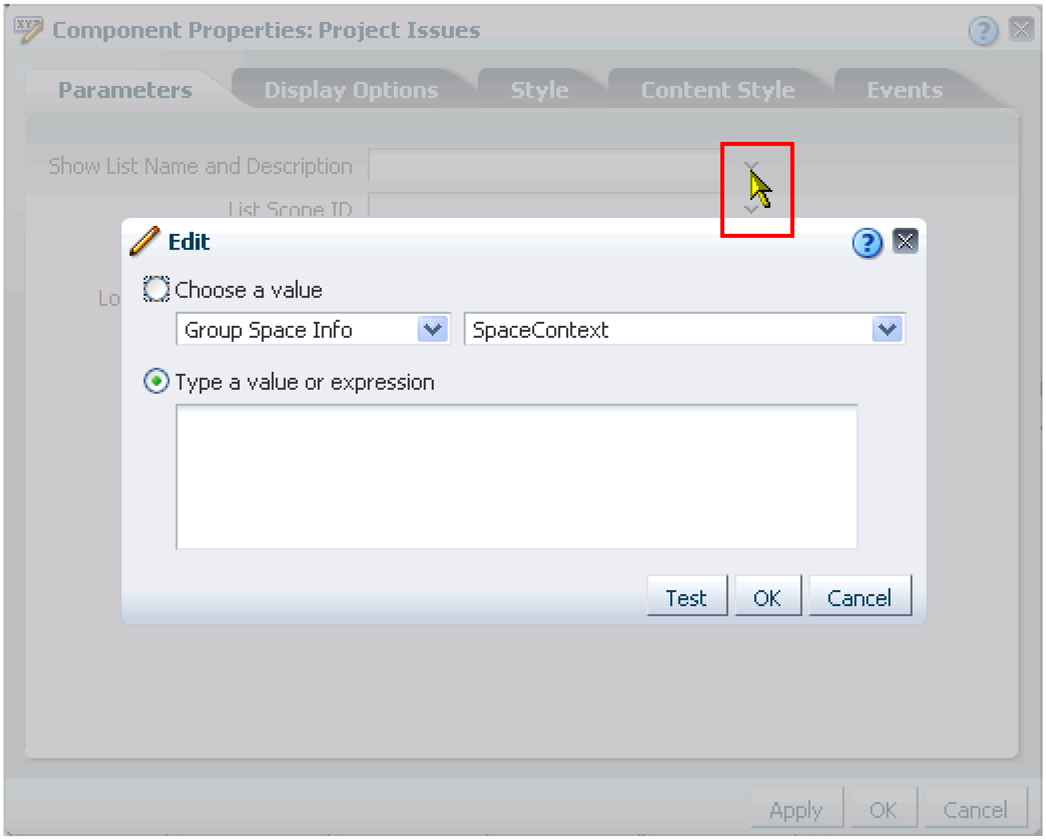
- Introducing the Expression Builder
- Expression Language Expressions

10.4.5.1 Introducing the Expression Builder

All properties on the **Parameters** and **Display Options** tabs provide an **Edit** icon that opens a simple Expression Language (EL) editor, called the Expression Builder. Use the Expression Builder when you want to use some sort of dynamic computation for your property value.

Click the **Edit** icon next to a property to open the editor. (Figure 10–27).

Figure 10–29   Edit Icon Next to a Parameter Value Field and the Resulting Editor



See Also: For information about accessing component properties, see Section 10.4.2, "Setting Component Properties."

The Expression Builder is particularly useful when you want a value that is retrievable but otherwise unknown, for example, when you want a value to be the name of the current user or the current application skin.

Select predefined values, under **Choose a value**, or enter a value or an Expression Language expression, under **Type a value or expression**.

Use the following formats to enter values:

- a literal number: `#{123}`
- a literal string: `#{'string'}`
- a literal Boolean: `#{true}`
- a Java Bean called to return a value: `#{generalSettings.preferredTimeStyle}`

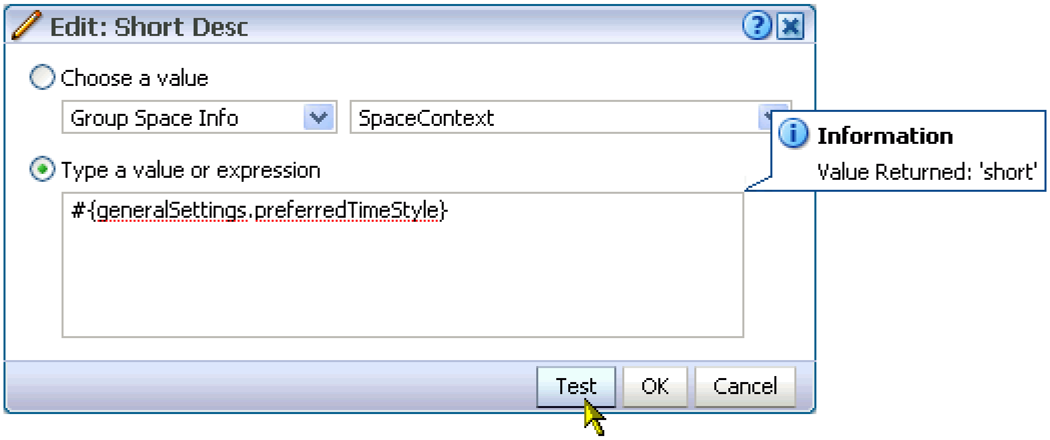
The editor provides a **Test** button for validating your EL entry. The **Test** button is enabled only when you select **Type a value or expression**.

Validation checks the EL syntax and evaluates the expression. Because expression values vary according to the context in which they are executed, the resulting value that appears in the editor may differ from the value returned during actual use.

Note, however, that only EL is validated when you click **Test**; other types of values are not validated.

Test results are shown in a popup (Figure 10–30).

Figure 10–30 Test Result in EL Editor



10.4.5.2 Expression Language Expressions

This section provides a series of tables that list and describe useful EL expressions. Tables are grouped according to their applicable context. This section contains the following subsections:

- EL Expressions Relating to WebCenter Spaces Application Information
- EL Expressions Relating to WebCenter Spaces Group Spaces
- EL Expressions Relating to Application Pages
- EL Expressions Relating to Services
- EL Expressions Relating to WebCenter Spaces Navigation
- EL Expressions Relating to Application Security
- EL Expressions Relating to WebCenter Spaces User Preferences
- Utilitarian EL Expressions

10.4.5.2.1 EL Expressions Relating to WebCenter Spaces Application Information Table 10–2 lists EL expressions relating to WebCenter Spaces application information and describes the types of values they return.

Table 10–2 EL Expressions Relating to WebCenter Spaces Application Information

Expression	Returns
`#{WCAppContext}`	An *oracle.webcenter.webcenterapp.context.WCApplicationContext* object that provides an access point in the current Web request for all WebCenter application-related information.
`#{WCAppContext.currentWebCenterURI}`	Returns a URL representing the current Web request with bookmarkable WebCenter Spaces URL parameters of the request appended to the end (parameters are not necessarily in a fixed order). Example payload: `http://stacv75.us.oracle.com/webcenter/faces/oracle/webcenter/page/scopedMD/someguid/SomePage.jspx?wc.contextURL=/spaces/somename&wc.pageScope=1234`
`#{WCAppContext.application.applicationConfig}`	An *oracle.webcenter.webcenterapp.beans.WebCenterType* bean with a payload of metadata from the current WebCenter Spaces application.
`#{WCAppContext.application.applicationConfig.title}`	Returns the display name of the current WebCenter Spaces application (as configured through WebCenter Administration Settings). Out of the box, this returns *WebCenter Spaces*.
`#{WCAppContext.application.applicationConfig.logo}`	If an application logo was uploaded through WebCenter Administration Settings, this expression returns the URL to the application logo image. Out of the box, this returns *null*.
`#{WCAppContext.application.applicationConfig.helpPage}`	Returns the URL to the Help application used for the current WebCenter Spaces application (as configured through WebCenter Administration Settings). Out of the box, this returns */webcenterhelp/spaces*.
`#{WCAppContext.application.applicationConfig.copyrightMessage.customValue}`	If a copyright message was configured through WebCenter Administration settings, this expression returns the application copyright message. Out of the box, this returns *null*.
`#{WCAppContext.application.applicationConfig.privacyPolicyUrl}`	Returns the URL to the privacy policy document followed by the application (as configured through WebCenter Administration Settings). Out of the box, this returns *http://www.oracle.com/html/privacy.html*.
`#{WCAppContext.application.applicationConfig.skin}`	Returns the name of the default ADF Faces skin family to use for rendering pages in the application (as configured through WebCenter Administration Settings). This expression represents only the application-level setting that may not necessarily be used in all Web requests. For example, you cannot use it successfully if a user has chosen to override the skin through application Preferences (for more information, see Chapter 3, "Setting Your Personal Preferences").
`#{requestContext.skinFamily}`	Returns the name of the ADF Faces skin family being used for the current Web request, depending on factors such as what has been configured at the application level, the current user's preference setting, and so on. Returns the same value as `#{adfFacesContext.skinFamily}`.

10.4.5.2.2 EL Expressions Relating to WebCenter Spaces Group Spaces

Table 10–3 lists EL expressions relating to WebCenter Spaces group spaces and describes the types of values they return.

Note: The group space name and the group space display name are two different things: The group space name is the value entered for **Group Space Name** on the **General** tab of a group space Settings page; the group space display name is the name that appears, for example, on the group space's tab. Many of the EL expressions in Table 10–3 call for the group space name.

Table 10–3 EL Expressions Relating to WebCenter Spaces Group Spaces

Expression	Returns
`#{spaceContext}`	An *oracle.webcenter.spaces.context.SpacesContext* object that provides an access point in the current Web request for all group-space related information. The value of this expression is whatever is returned on invoking the java API: `SpacesContext.getCurrentInstance()`
`#{spaceContext.currentSpace}`	An *oracle.webcenter.spaces.Space* object that represents the group space associated with the current Web request. If the current Web request is not in a group space context (that is, it is in a personal space context), it returns a value of *null*. The value of this expression is whatever is returned on invoking the java API: `SpacesContext.getCurrentInstance().getCurrentSpace()`
`#{spaceContext.currentSpaceName}`	The name of the group space associated with the current Web request. If the current Web request is not in a group space context (that is, it is in a personal space context), it returns a value of *null*. The value of this expression is whatever is returned on invoking the java API: `SpacesContext.getCurrentInstance().getCurrentSpace()`
`#{spaceContext.space[spaceName]}` `#{spaceContext.currentSpace}`	An *oracle.webcenter.spaces.Space* object that represents the group space with the specified name `spaceName` or the current group space (`currentSpace`). For example, `#{spaceContext.space['FinanceProject']}` returns the space object for the group space called *FinanceProject*. The value of this expression is whatever is returned in java on invoking *.getSpace(...)* on the current *SpacesManager* passing in the *MDSSession* of the current *ADFContext*.
`#{spaceContext.space[spaceName].metadataPath}` `#{spaceContext.currentSpace.metadataPath}`	The MDS path of the space metadata document for the group space with specified name `spaceName` or the current group space (`currentSpace`). For example, `#{spaceContext.space['FinanceProject'].metadataPath}` evaluates to */oracle/webcenter/space/metadata/spaces/FinanceProject/space.xml* The value of this expression is whatever is returned in java on invoking *.getMetadataPath()* on the space object for the group space.

Table 10–3 (Cont.) EL Expressions Relating to WebCenter Spaces Group Spaces

Expression	Returns
`#{spaceContext.space[spaceName].metadata}` `#{spaceContext.currentSpace.metadata}`	An *oracle.webcenter.spaces.beans.SpaceType* bean that carries metadata about the group space with the specified name `spaceName` or the current group space (`currentSpace`). The value of this expression is whatever is returned in java on invoking *.getMetadata()* on the space object for the group space passing in the *MDSSession* of the current *ADFContext*.
#{spaceContext.space[spaceName].metadata.displayName} #{spaceContext.currentSpace.metadata.displayName}	The display name of the group space with the specified name `spaceName` or the current group space (`currentSpace`). For example, if a group space called *Web20Space* has the display name *Web 2.0 Space*, then `#{spaceContext.space['Web20Space'].metadata.displayName}` evaluates to *Web 2.0 Space*.
`#{spaceContext.space[spaceName].metadata.icon}` `#{spaceContext.currentSpace.metadata.icon}`	A URL to the icon associated with the group space with the specified name `spaceName` or the current group space (`currentSpace`).
`#{spaceContext.space[spaceName].metadata.description}` `#{spaceContext.currentSpace.metadata.description}`	The description of the group space with the specified name `spaceName` or the current group space (`currentSpace`). For example, `#{spaceContext.space['FinanceProject'].metadata.description}` evaluates to *Conglomeration of all teams involved in financial activities*.
`#{spaceContext.space[spaceName].metadata.creationDate}` `#{spaceContext.currentSpace.metadata.creationDate}`	A *java.util.Calendar* object representing the date-time on which the group space with specified name `spaceName` or the current group space (`currentSpace`) was created.
`#{spaceContext.space[spaceName].metadata.createdBy}` `#{spaceContext.currentSpace.metadata.createdBy}`	The user-name of the person who created the group space with the specified name `spaceName` or the current group space (`currentSpace`).
`#{spaceContext.space[spaceName].metadata.keywords}` `#{spaceContext.currentSpace.metadata.keywords}`	A comma-delimited list of searchable keywords associated with the group space with the name `spaceName` or the current group space (`currentSpace`). For example, if the group space *FinanceProject* has the keywords `finance, project, money`, then `#{spaceContext.space['FinanceProject'].metadata.keywords}` evaluates to *finance, project, money*.
`#{spaceContext.space[spaceName].metadata.offline}` `#{spaceContext.currentSpace.metadata.offline}`	Boolean value that indicates whether the group space with the specified name `spaceName` or the current group space (`currentSpace`) is offline.
`#{spaceContext.space[spaceName].metadata.closed}` `#{spaceContext.currentSpace.metadata.closed}`	Boolean value that indicates whether the group space with the specified name `spaceName` or the current group space (`currentSpace`) is closed.
`#{spaceContext.space[spaceName].metadata.selfRegistration}` `#{spaceContext.currentSpace.metadata.selfRegistration}`	Boolean value that indicates whether users are allowed to register themselves with the group space with the specified name `spaceName` or the current group space (`currentSpace`).

Table 10–3 (Cont.) EL Expressions Relating to WebCenter Spaces Group Spaces

Expression	Returns
`#{spaceContext.space[spaceName].metadata.discoverable}` `#{spaceContext.currentSpace.metadata.discoverable}`	Boolean value that indicates whether users can discover the existence of the group space with the specified name `spaceName` or the current group space (`currentSpace`) by searching for it or seeing it listed on the My Group Spaces page.
`#{spaceContext.space[spaceName].metadata.publishRSS}` `#{spaceContext.currentSpace.metadata.publishRSS}`	Boolean value indicating whether the group space with the specified name `spaceName` or the current group space (`currentSpace`) publishes RSS feeds.
`#{spaceContext.space[spaceName].metadata.mailingList}` `#{spaceContext.currentSpace.metadata.mailingList}`	The email address of the mailing list associated with the group space with the specified name `spaceName` or the current group space (`currentSpace`).
`#{spaceContext.space[spaceName].metadata.customAttributes[attributeName]}` `#{spaceContext.currentSpace.metadata.customAttributes[attributeName]}`	The value of a specific custom attribute of the name `attributeName` for the group space with the specified name `spaceName` or the current group space (`currentSpace`). For example, if the *FinanceProject* group space has a custom attribute called `stockPrice` with a value of `13.9`, then `#{spaceContext.space['FinanceProject'].metadata.customAttributes['stockPrice']}` evaluates to *13.9*.
`#{WCAppContext.spacesResourcesPath}/#{spaceContext.space[spaceName].metadata.logo}` `#{WCAppContext.spacesResourcesPath}/#{spaceContext.currentSpace.metadata.logo}`	Returns the group space logo/icon URL for the group space named `spaceName` or the current group space (`currentSpace`).

10.4.5.2.3 EL Expressions Relating to Application Pages Table 10–4 lists EL expressions relating to application pages and describes the types of values they return. These expressions are useful in WebCenter Spaces and in custom WebCenter applications that include the Page service.

Table 10–4 EL Expressions Relating to Application Pages

Expression	Returns
`#{pageDocBean.title}`	Returns the page display name, for example: *FinanceProject*
`#{pageDocBean.createdBy}`	Returns the user name of the person who created the page, for example: *monty*
`#{pageDocBean.createDateString}`	Returns the date and time the page was created, for example: *2008-11-19T10:18:36*
`#{pageDocBean.lastUpdatedBy}`	Returns the user name of the person who last updated the page, for example: *monty*
`#{pageDocBean.lastUpdateDateString}`	Returns the date and time the page was last updated, for example: *2008-11-19T10:18:36*

Table 10–4 (Cont.) EL Expressions Relating to Application Pages

Expression	Returns
`#{pageDocBean.pagePath}`	Returns the file directory path to the page relative to the application root directory, for example: */oracle/webcenter/page/scopedMD/s8bba98ff_4cbb_40b8_beee_296c916a23ed/user/Umonty/Page4.jspx*
`#{pageDocBean.name}`	Returns the file name of the page, for example: *Page4.jspx*
`#{pageDocBean.UICSSStyle}`	Returns the name of the style scheme used on the page, for example: *WCSchemeEggShell*
`#{pageDocBean.UISchemeBGImage}`	Returns the directory path and file name of the page scheme background image.
`#{pageDocBean.UISchemeBGColorString}`	Returns the hexadecimal value of the page scheme background color, for example: *#ffa500*
`#{pageDocBean.pagePermission}`	Returns the permission the current user has on the page, for example: *oracle.webcenter.page.model.security.CustomPagePermission*
`#{pageDocBean.pageSecurityTarget}`	A string of 60 or so characters that uniquely identifies the current page to the security system, for example: *oracle_webcenter_page_scopedMD_s8bba98ff_4cbb_40b8_beee_296c916a23ed_user_Umonty_Page4PageDef*

10.4.5.2.4 EL Expressions Relating to Services Table 10–5 lists EL expressions relating to services and describes the types of values they return.

Table 10–5 EL Expressions Relating to Services

Expression	Returns
`#{webcenterService[serviceId]}`	An *oracle.webcenter.framework.service.Service* object representing the WebCenter service with the service ID `serviceId`. For example, `#{webcenterService['oracle.webcenter.doclib']}` returns *Documents Service* (see Table 10–6, " Service IDs").
`#{webcenterService[serviceId].configured}`	Returns a Boolean value that indicates whether the WebCenter service with the service ID `serviceId` is configured for use in the current WebCenter Spaces application. For example, `#{webcenterService['oracle.webcenter.collab.forum'].configured}` returns *true* if Discussions service can be used in the application, *false* otherwise (see Table 10–6, " Service IDs").
`#{sessionContext['oracle.webcenter.collab.forum'].groupInfo['groupSpaceName'].forumId}`	Returns the forum ID of the specified group space discussion forum. Enter the group space name in lieu of `groupSpaceName`.
`#{sessionContext['oracle.webcenter.collab.forum'].groupInfo['groupSpaceName'].categoryId}`	Returns the category ID of the specified group space discussion forums. Enter the group space name in lieu of `groupSpaceName`.

Table 10–6 lists service IDs associated with services at runtime.

Table 10–6 Service IDs

Service	ID
Announcements	oracle.webcenter.collab.announcement
Discussions	oracle.webcenter.collab.forum
Documents	oracle.webcenter.doclib
Events	oracle.webcenter.collab.calendar.community
Group Space Management	oracle.webcenter.community
Instant Messaging and Presence (IMP)	oracle.webcenter.collab.rtc
Links	oracle.webcenter.relationship
Lists	oracle.webcenter.list
Mail	oracle.webcenter.collab.mail
Notes	oracle.webcenter.note
Page	oracle.webcenter.page
People Connections: Activity Stream	oracle.webcenter.activitystreaming
People Connections: Connections	oracle.webcenter.peopleconnections.connections
People Connections: Feedback	oracle.webcenter.peopleconnections.kudos
People Connections: Message Board	oracle.webcenter.peopleconnections.wall
People Connections: Profile	oracle.webcenter.peopleconnections.profile
Recent Activities	oracle.webcenter.recentactivity
RSS	oracle.webcenter.rss
Search	oracle.webcenter.search
Tags	oracle.webcenter.tagging
Wikis and Blogs	oracle.webcenter.wiki
Worklist	oracle.webcenter.worklist

10.4.5.2.5 EL Expressions Relating to WebCenter Spaces Navigation Table 10–7 lists EL expressions relating to WebCenter Spaces navigation and describes the types of values they return.

Table 10–7 EL Expressions Relating to WebCenter Spaces Navigation

Expression	Returns
`#{spaceContext.currentSpaceName}`	Used in a directory path, this expression returns the current page. For example, the following directory path, relative to the application root directory, returns the **General** subtab of the group space Settings page: `/webcenter/spaces/#{spaceContext.currentSpaceName}/settings?subTabViewId=general` The following example returns a link to the Discussions page in the current group space: `/webcenter/spaces/#{spaceContext.currentSpaceName}/page/Discussions` You can use the second example for navigating to any group space page; simply replace *Discussions* with the desired page name.

10.4.5.2.6 EL Expressions Relating to Application Security Table 10–8 lists EL expressions relating to application security and describes the types of values they return.

Table 10–8 EL Expressions Relating to Application Security

Expression	Returns
`#{security.pageContextCommunityModerator}`	Returns the value *true* if the current user is a moderator of the current group space.

10.4.5.2.7 EL Expressions Relating to WebCenter Spaces User Preferences Table 10–9 lists EL expressions applicable to user preferences and describes the types of values they return.

Table 10–9 EL Expressions Relating to User Preferences

Expression	Returns
`#{generalSettings.userTimeZone}`	Returns the time zone the current user has selected in application Preferences. For more information, see Section 3.2, "Setting Date and Time Preferences."
`#{generalSettings.preferredTimeStyle}`	Returns the time format the current user has selected in application Preferences. For more information, see Section 3.2, "Setting Date and Time Preferences."
`#{generalSettings.currentTime}`	Returns the current time in the user's selected locale.
`#{generalSettings.preferredDateStyle}`	Returns the date format the current user has selected in application Preferences. For more information, see Section 3.2, "Setting Date and Time Preferences."
`#{generalSettings.formattedCurrentDate}`	Returns the current date in the user's selected locale.
`#{generalSettings.formattedCurrentDateTime}`	Returns the current date and time in the user's selected locale.
`#{requestContext.skinFamily}`	Returns the name of the ADF Faces skin family being used for the current Web request, depending on factors such as what has been configured at the application level, the current user's preference setting, and so on.
`#{generalSettings.preferredAccessibilityMode}`	Returns the preferred accessibility mode (either `default`, `inaccessible`, or `screenReader`)

10.4.5.2.8 Utilitarian EL Expressions Table 10–10 lists utilitarian EL expressions and describes the types of values they return.

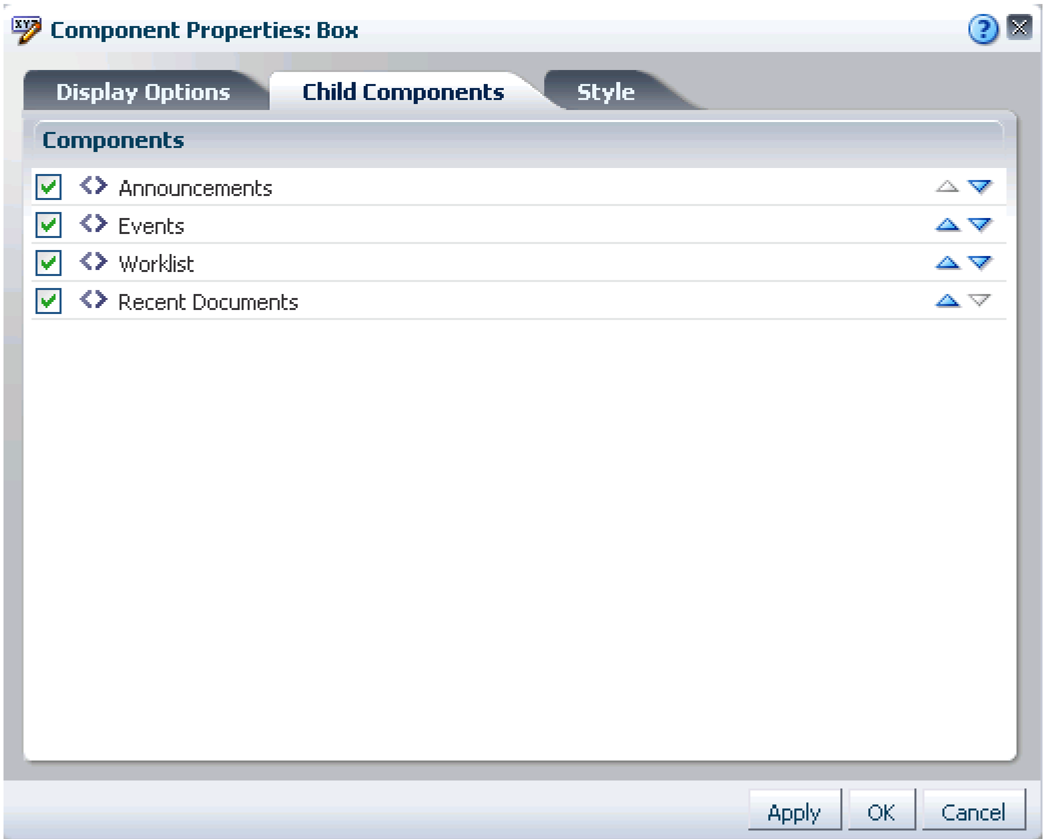
Table 10–10 Utilitarian EL Expressions

Expression	Returns
`#{userPreferences.currentDate}`	Returns the current date in the format specified in the current user's preferences.
`#{WCTruncator[text]['numberOfChars']}`	Returns a truncation of the string specified as `text` to the number of characters specified as `numberOfChars`, followed by a trailing ellipsis, for example: `#{WCTruncator['abracadabra']['5']}` evaluates to *abrac...*
`#{facesContext.externalContext.remoteUser}`	Returns the user name of the currently logged in user. Useful for passing to task flows or portlets or creating user-specific URLs. Examples of returned values include: ▪ *mei.nem@oracle.com* ▪ *orcladmin* ▪ *Monty*
`#{securityContext.userName}`	Returns the user name of the currently logged in user. If the current user is not logged in, this expression returns no value.
`#{facesContext.viewRoot.locale}` `#{facesContext.externalContext.requestLocale}`	Both of these expressions return the request locale (that is, the browser locale setting).
`#{changeModeBean.inEditMode}`	Returns *true* if current application page is in Oracle Composer mode. Returns *false* if current application page is not in Oracle Composer mode
`#{adfFacesContext.skinFamily}`	Returns the current application skin family. Returns the same value as `#{requestContext.skinFamily}`.

10.4.6 Working with Child Components

The **Child Components** tab in the Component Properties dialog (Figure 10–31) provides controls for hiding, showing, and rearranging the components that are contained within the current component.

Figure 10–31 The Child Components Tab in the Component Properties Dialog



The changes you make through the **Child Components** tab are customizations that affect every user's view of the component instance.

This section provides information about how to use the controls on the **Child Components** tab. It includes the following subsections:

- Section 10.4.6.1, "Hiding and Showing Child Components"
- Section 10.4.6.2, "Rearranging Child Components"

10.4.6.1 Hiding and Showing Child Components

Hiding is useful for keeping a component instance out of general view while still maintaining its presence on the page. When you hide a child component through the Component Properties dialog, it is hidden in everyone's view of the page. When you are ready to show the component instance, it is a simple matter to reselect the component to show through the **Child Components** tab.

To hide or show child components:

1. Go to the page where you want to hide or show child components, and open Oracle Composer.

   For more information, see Section 10.1.2.1, "Opening a Page in Oracle Composer."

2. Click the **Edit** icon (the pencil) on the component of interest to open the Component Properties dialog.
3. Click the **Child Components** tab to bring it forward (see Figure 10–31).
4. The next step depends on whether you want to hide or show a component:

- Clear the checkbox to the left of any components you want to hide.
- Select the checkbox to the left of any components you want to show.

5. Click **OK** to exit the dialog.
6. Click **Save** and then **Close** to exit Oracle Composer.

10.4.6.2 Rearranging Child Components

The **Child Components** tab provides a convenient and efficient way to rearrange the content within a particular container, such as a Box layout component. When you rearrange child components through the Component Properties dialog, they are rearranged on everyone's view of the page.

> **See Also:** You can also rearrange page components in a way that affects everyone's view by dragging and dropping components while in Oracle Composer. For more information, see Section 4.2.1, "Rearranging Page Content."

> **Note:** When you use Box controls to split a Box, the rearrange capability is disabled in the Component Properties dialog on the **Child Components** tab. You can still rearrange content in such boxes by dragging and dropping on the page itself. For more information about the Box layout component, see Section 9.1.1, "The Box Layout Component."

To rearrange a child component:

1. Go to the page where you want to rearrange child components, and open Oracle Composer.

   For more information, see Section 10.1.2.1, "Opening a Page in Oracle Composer."
2. Click the **Edit** icon (the pencil) on the component of interest to open the Component Properties dialog.
3. Click the **Child Components** tab to bring it forward (see Figure 10–31).
4. Click the up or down arrows next to the component you want to move, depending on where you want to move it.

   The direction that a child component is moved depends on the orientation of its parent container. For example, if the container is oriented vertically, child components move up (up arrow) or down (down arrow); if the container is oriented horizontally, child components move right (up arrow) or left (down arrow).
5. Click **OK** to exit the dialog.
6. Click **Save** and then **Close** to exit Oracle Composer.

10.4.7 Working with Style and Content Style Properties

Style and Content Style properties provide an opportunity to fine-tune your application look-and-feel at the component level. Enter values for Style and Content Style properties, or specify your own values through the `Other CSS` property that appears on both tabs.

This section introduces Style and Content Style properties and provides tables that list and describe them. Additionally, it provides information about how to use the Other CSS property. It contains the following subsections:

- Section 10.4.7.1, "Understanding Style and Content Style Properties"
- Section 10.4.7.2, "Entering Other CSS on the Style and Content Style Tabs"
- Section 10.4.7.3, "Using the Other CSS Property to Change Component Borders"

10.4.7.1 Understanding Style and Content Style Properties

Use component Style and Content Style properties to specify color, style, and margin settings on the selected component instance.

Style settings override style settings on hierarchically superior components, such as the component's parent container, the page, and the application. Content Style settings override Style settings. For example, Style settings control the look and feel of a Movable Box; when Content Style settings come into play, Style settings control only the Movable Box chrome. Content Style settings control the look and feel of the components contained within the Movable Box. This look and feel may, in turn, be overridden by the Style settings set on those individual components.

Note, however, that Content Style properties set for a container, such as a Movable Box, may not take effect if the component inside the container overrides the container Content Style properties by a means other than the component's own Content Style properties. For example, the background color set for a Movable Box that contains a task flow may not take effect if, at design time, instead of being set to inherit from the container, the task flow background color was set with a hard-coded value.

Table 10–11 lists and describes common component Style properties. Note that some components use only a subset of the following style properties. These include the Movable Box layout component and task flows and portlets added through the Oracle Composer Catalog. Such components provide only `Margin` and `Other CSS` properties.

Table 10–11 Style Properties

Property	Description
`Color`	A pick-list for selecting a default color for text Select a default color for any text included in the component instance. For example, imagine that you have added a Text layout component to a Box layout component. When you set Box Style properties, the default text color you apply to the Box is also automatically applied to the Text layout component, unless you also define a Color value for the Text layout component.
`Background Color`	A pick-list for selecting a component background color If you specify a background color for Content Style, then the background color specified for the Style property is not applied.
`Width`	A field for specifying the width of component content Set a fixed width for component content. You can use any standard CSS unit of measure, such as pt, px, pc, li, %, and so on.

Table 10–11 (Cont.) Style Properties

Property	Description
`Height`	A field for specifying the height of component content Set a fixed height for component content. You can use any standard CSS unit of measure, such as pt, px, pc, li, and so on. Never express a Height value as a percentage. Because of differences between browsers and between layout containers, percentages do not work as you expect. If you want your component to take up 100% of a page, consider creating a page using the Stretch page style and adding the component to it (for more information, see Section 8.4.1, "What You Should Know About Page Layouts, Styles, and Schemes"). The Height property works with the `Stretch Content` property, available on the Display Options tab. `Stretch Content` enables a content container to stretch its content to the specified height.
`Font`	A field for entering a default font for component text Enter one or more default fonts for any text included in the component instance. Separate multiple values with a comma (,), for example `arial,helvetica,sans serif`. The browser tries to use the first value, and uses other values in turn, depending on which font is available to the local system.
`Font Size`	The size of component text relative to either your browser's default font size or the font size of the parent element Enter one value from the following types of values: ■ `length`–Sets the font size to a fixed size. For example, enter: `14px` ■ `xx-small`, `x-small`, or `small` ■ `medium`–The default ■ `large`, `x-large`, or `xx-large` ■ `smaller`–Sets the font size to a size smaller than the parent element. ■ `larger`–Sets the font size to a size larger than the parent element. ■ `%`–Sets the current font size to a percentage of the font size of the parent element. For example, enter: `75%`
`Font Style`	Options for applying styles to component fonts Select a default font style for any text added to the layout component. Choose from: ■ **Bold** ■ *Italic* ■ Underline ■ Strikethrough The font style you select here applies to any text inside the component instance.

Table 10–11 (Cont.) Style Properties

Property	Description
`Background Image`	A field for entering a URL to a component background image Enter the URL to an image you want to render in the component background. Use standard CSS syntax. For example: `url(http://www.abc.com/image.jpg)`
`Margin`	Fields for specifying the border of space to draw around the component Enter: ■ An absolute value. Include your preferred unit of measurement. For example: `2px` Use only those units of measurement supported in standard CSS, such as pt, px, pc, li, and so on. ■ A percentage of the margin of a parent component (provide a percent sign with your value, such as `10%`). ■ `auto`: Set the value automatically according to browser defaults.
`Other CSS`	A field for specifying additional CSS for the component Add any other CSS encoding you care to that is not covered by the other Style properties. You must use standard CSS syntax for this value to be valid (for more information about Other CSS, see Section 10.4.7.2, "Entering Other CSS on the Style and Content Style Tabs").

Use the properties listed on the **Content Style** tab of the Component Properties dialog to specify color, style, and margin settings on the content of a selected component instance. The styles you specify here are applied to the component instance, overriding any styles specified for Style properties, for the page, and for the entire application.

Table 10–12 lists and describes **Content Style** properties.

Table 10–12 Content Style Properties

Property	Description
`Color`	A pick-list for selecting a default color for any text included in component content
`Background Color`	A pick-list for selecting a background color for component content When you specify a background color for Content Style, the background color specified for the Style property is not applied.
`Width`	A field for specifying the width of component content Set a fixed width for component content. You can use any standard CSS unit of measure, such as pt, px, pc, li, %, and so on.
`Height`	A field for specifying the height of component content Set a fixed height for component content. You can use any standard CSS unit of measure, such as pt, px, pc, li, and so on. Never express a Height value as a percentage. Because of differences between browsers and between layout containers, percentages do not work as you expect. If you want your component to take up 100% of a page, consider creating a page using the Stretch page style and adding the component to it (for more information, see Section 8.4.1, "What You Should Know About Page Layouts, Styles, and Schemes"). The Height property works with the `Stretch Content` property, available on the Display Options tab. `Stretch Content` enables a content container to stretch its content to the specified height.

Table 10–12 (Cont.) Content Style Properties

Property	Description
`Font`	A field for specifying the font to use for component content Select a default font for any text included in the layout component The font you select here applies to any text inside the container/parent component. Select a default font for component content. Separate multiple values with a comma (,), for example `arial,helvetica,sans serif`. The browser tries to use the first value, and uses other values in turn, depending on which font is available to the local system.
`Font Size`	The size of component text relative to either your browser's default font size or the font size of the parent element Enter one value from the following types of values: ■ `length`–Sets the font size to a fixed size. For example, enter: `14px` ■ `xx-small`, `x-small`, or `small` ■ `medium`–The default ■ `large`, `x-large`, or `xx-large` ■ `smaller`–Sets the font size to a size smaller than the parent element. ■ `larger`–Sets the font size to a size larger than the parent element. ■ `%`–Sets the current font size to a percentage of the font size of the parent element. For example, enter: **75%**
`Font Style`	Options for applying styles to component fonts Choose from: ■ **Bold** ■ *Italic* ■ Underline ■ Strikethrough The font style you select here applies to any text inside the component.

Table 10–12 (Cont.) Content Style Properties

Property	Description
`Background Image`	A field for entering a URL to a component background image Enter the URL to an image you want to appear in the layout component background. Note that task flows, text, and other objects added to the component display on top of the image. Use standard CSS syntax. For example: `url(http://www.abc.com/image.jpg)`
`Margin`	Fields for specifying the border of space to draw around component content Enter: ■ An absolute value, including your preferred unit of measure For example: `2px` Use only those units of measure supported in standard CSS, such as pt, px, pc, li, and so on. ■ A percentage of the margin of a parent component (provide a percent sign with your value, such as `10%`) ■ `auto`: a value set automatically according to browser defaults
`Other CSS`	A field for specifying additional CSS for the component Add any other CSS encoding you care to that is not covered by the other Style properties. You must use standard CSS syntax for this value to be valid (for more information about Other CSS, see Section 10.4.7.2, "Entering Other CSS on the Style and Content Style Tabs"). For an example of using Other CSS to create borders around a task flow, see Section 10.4.7.3, "Using the Other CSS Property to Change Component Borders."

10.4.7.2 Entering Other CSS on the Style and Content Style Tabs

The `Other CSS` field that appears on Component Properties **Style** and **Content Style** tabs provides an opportunity to apply CSS styles that are not otherwise covered on the tabs. Use standard CSS syntax (for information about standard CSS syntax, see `http://www.w3.org/TR/CSS2/propidx.html`). Separate multiple entries with a semicolon (;), for example:

```
background: #00FF00 url(http://www.google.com/intl/en_ALL/images/logo.gif)
no-repeat fixed top; font-size: xx-small
```

Note, however, that some CSS styles are not supported by popular browsers. Moreover, some styles are specific to one browser and may not work correctly in another browser.

Table 10–13 provides a few examples of CSS you can use in the `Other CSS` field.

Table 10–13 Example Values for Other CSS

Value	Description and Examples
`background-repeat`	Specify whether and how the background image should repeat. Enter a value in the format `background-repeat: <value>` For example: `background-repeat: repeat` ■ `no-repeat`–Forgo repeating the image. ■ `repeat`–Repeat the image to fill the container. ■ `repeat-x`–Repeat the image horizontally but not vertically. ■ `repeat-y`–Repeat the image vertically but not horizontally.
`background-position`	Set the starting position of a background image. Enter values in the format `background-position: <value> <value>` For example: `background-position: top left` Except as noted, if you specify only one value, the second value defaults to `center`. The first set of value pairs express horizontal and vertical as positions: ■ `top left`, `top center`, or `top right` ■ `center left`, `center center`, or `center right` ■ `bottom left`, `bottom center`, or `bottom right` The second set of value pairs express horizontal and vertical positions as either percentages or units of measure: ■ `x% y%`–The horizontal (x) and vertical (y) positions expressed as a percentage. The top left corner is 0% 0%. The bottom right corner is 100% 100%. If you specify only one value, the second value defaults to 50%. ■ `xpos ypos`–The horizontal (x) and vertical (y) positions expressed as a unit of measurement. The top left corner is 0 0. Units can be pixels (0px 0px) or any other CSS units. If you specify only one value, the second value defaults to 50%. You can mix % and positions.
`font-size`	The size of component text relative to either your browser's default font size or the font size of the parent element. Enter a value in the format `font-size: <value>` For example: `font-size: xx-small` ■ *`length`*–Sets the font size to a fixed size, for example `font-size: 14px` ■ `xx-small`, `x-small`, or `small` ■ `medium`–The default ■ `large`, `x-large`, or `xx-large` ■ `smaller`–Sets the font size to a size smaller than the parent element. ■ `larger`–Sets the font size to a size larger than the parent element. ■ `%`–Sets the current font size to a percentage of the font size of the parent element, for example, `font-size: 75%`

Table 10–13 (Cont.) Example Values for Other CSS

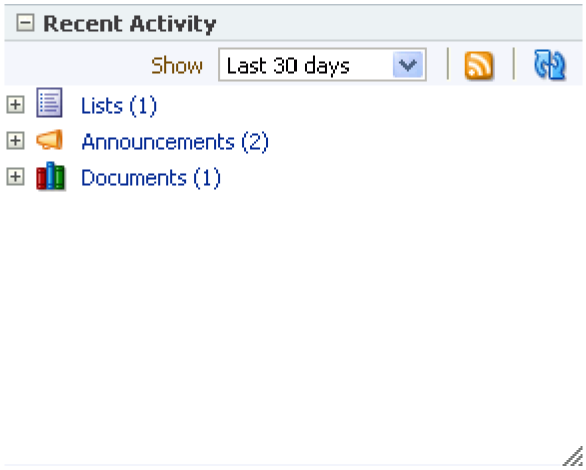
Value	Description and Examples
padding	A collective property for setting the white space (or clear space) around a component in one expression. Enter up to four values. Express values in a specific length or as a percentage of the closest element, using the syntax padding: <value> <value> <value> <value> For example: padding: 5px 10px 5px 10px Where: ■ One value sets padding for all four sides. For example, padding: 10px ■ Two values set padding for top/bottom and left/right. For example, padding: 10px 15px ■ Three values set padding for top, left/right, and bottom. For example, padding: 10px 5% 10px ■ Four values set padding in turn for top, right, bottom, left. For example, padding: 5px 10px 15px 20px Use any standard CSS unit of measure, such as pt, px, pc, li, %, and so on.
padding-bottom	Sets the white space (or clear space) at the bottom of the element. Express values in a specific length or as a percentage of the closest element. For example: padding-bottom: 10px
padding-left	Sets the white space (or clear space) at the left side of the element. Express values in a specific length or as a percentage of the closest element. For example: padding-left: 2%
padding-right	Sets the white space (or clear space) at the right of the element. Express values in a specific length or as a percentage of the closest element. For example: padding-right: 1pc
padding-top	Sets the white space (or clear space) at the top of the element. Express values in a specific length or as a percentage of the closest element. For example: padding-top: 16pt

10.4.7.3 Using the Other CSS Property to Change Component Borders

One application of the **Other CSS** property is to provide a variety of borders on task flows, portlets, and some layout components.

For example, Figure 10–32 depicts a Recent Activity task flow without borders.

Figure 10–32 Recent Activity Task Flow Without Borders



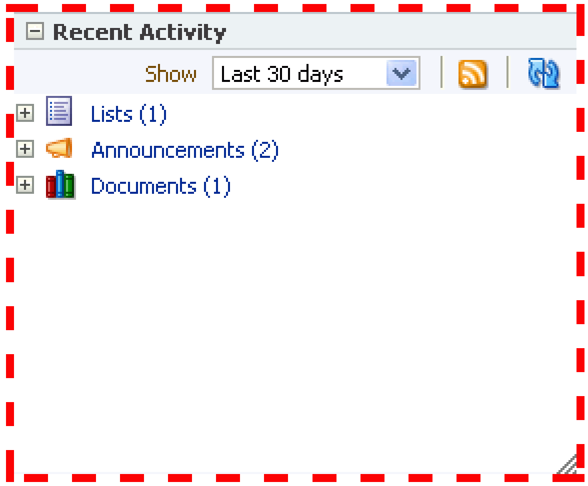
To create borders around the task flow, access its properties (for more information, see Section 10.4.2, "Setting Component Properties") and add CSS encoding. For example, enter the following code in the **Other CSS** field on the **Style** tab in the Component Properties dialog:

Example 10–1 Other CSS for Creating Borders

```
border-bottom-width:4px;
border-bottom-color:red;
border-bottom-style:dashed;
border-top-width:4px;
border-top-color:red;
border-top-style:dashed;
border-left-width:4px;
border-left-color:red;
border-left-style:dashed;
border-right-width:4px;
border-right-color:red;
border-right-style:dashed;
```

Figure 10–33 illustrates the result.

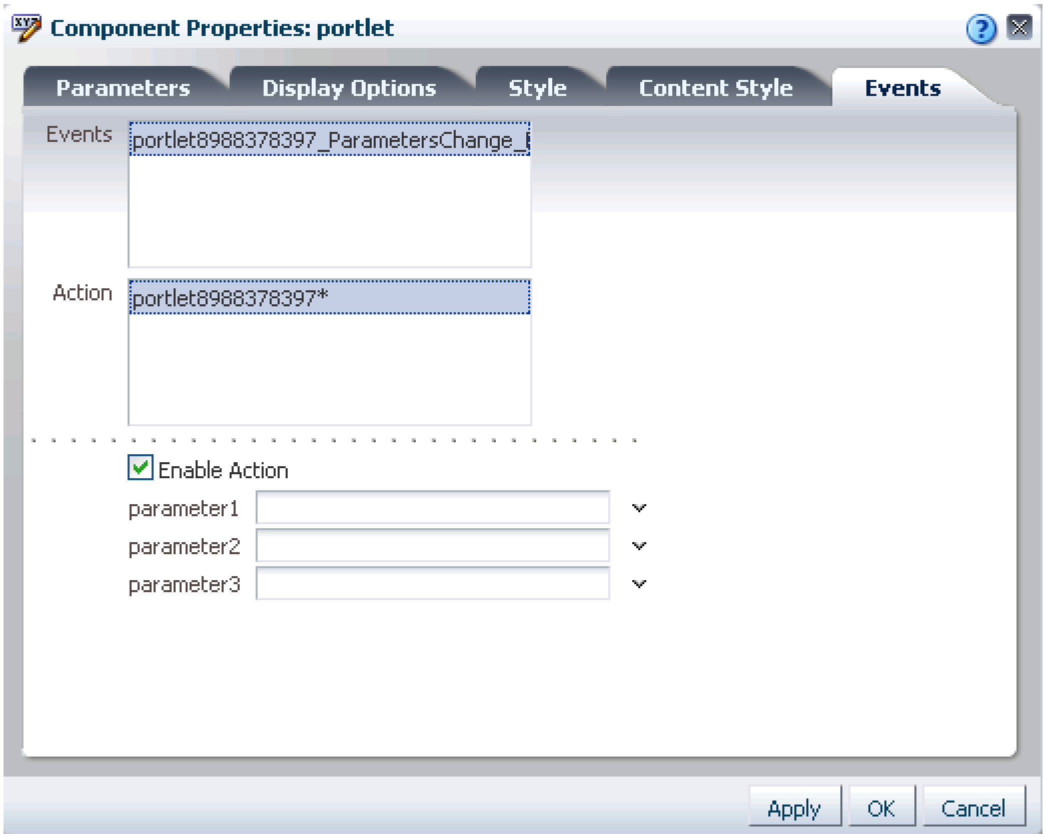
Figure 10–33 A Border Created Through the Other CSS Property



10.4.8 Working with Component Contextual Events

Events are defined occurrences within the current context, and event handlers are the engines that drive the results of that occurrence. The **Events** tab in the Component Properties dialog provides a means of wiring a contextual event to an action handler to enable the passing of values from a producer component to a consumer component when the event is triggered on the producer (Figure 10–34).

Figure 10–34 Events Tab in the Component Properties Dialog



For example, imagine two components: one is the producer of some kind of content (a *payload*) and the other consumes the content. When you wire these components to each other, you can use events to specify that when an event is triggered on the producer, the producer broadcasts a contextual event with a `payLoad` parameter, which the consumer component consumes through an event handler.

Note: Contextual events differ from the business events that can be raised by ADF Business Components. Additionally, contextual events differ from events raised by UI components. Contextual events can be used in association with UI events. In this case, an action listener that is invoked due to a UI event can, in turn, invoke a method action binding that then raises the event.

See Also: For information about business events, see *Oracle Fusion Middleware Web User Interface Developer's Guide for Oracle Application Development Framework*.

The **Events** tab does not appear for all components. For events to be available at runtime, event capability must be included in a component when the component is developed.

Table 10–14 lists and describes the properties presented on an **Events** tab.

Table 10–14 Properties on the Events Tab

Property	Description
`Events`	A list of all contextual events associated with components on the current page An event describes the type of action that triggers another action, such as the passing of a value. The events listed in the Events pane were built-in to the component when the component was created. All components do not include events; therefore, all components are not intrinsically capable of being wired to other components.
`Actions`	A list of action handlers associated with the selected consumer component The actions listed in the Actions pane vary according to which consumer component is selected. Actions enable you to associate an event with an event handler, which specifies what should happen when the triggering event occurs. The actions listed in the Actions pane were built-in to the component when the component was created.
`Enable Action`	A checkbox for enabling or disabling the selected event and action When you select this checkbox, a list of selected action handler parameters appears.
List of selected action handler parameters	Fields for entering values to use to deliver the payload from the producer component to the consumer component whenever the event occurs Enter parameter values, or click the **Edit** icon next to a parameter field to open an Expression Language Editor. For more information, see Section 10.4.5.1, "Introducing the Expression Builder." Parameter fields appear only when the `Enable Action` checkbox is selected.

For information about wiring components, see Chapter 11, "Wiring Pages, Task Flows, Portlets, and UI Components."

11

Wiring Pages, Task Flows, Portlets, and UI Components

Often a page needs information from a component on the page, or a region needs information from another region. While you can pass parameters through the page URL to obtain that information, doing so makes sense only when the parameters are well-known and the inputs are accessible to the page through Expression Language (EL). For more information, see Section 11.5, "Passing Parameter Values Through the Page URL."

Consider the case where you have a task flow with multiple page fragments that contain various interesting values that could be used as input on a page in the flow. For example, consider a page devoted to the display of information specific to the company that a user specifies in an input form. If you were to use parameters to pass the value, the task flow must surface output parameters for the union of each of the interesting values on each and every fragment. This is where component wiring becomes useful. Instead, for each fragment that contains the needed information, you can use component wiring to define a contextual event that is raised when the page is submitted. The page or fragment that requires the information can then subscribe to the various events and receive the information through the event.

Oracle Composer provides tools for wiring pages and components through its **Page Properties** and **Component Properties** dialogs. This chapter describes the use of these tools in the following sections:

Note: If you navigate away from a page while editing it, unsaved changes are lost.

Audience

This chapter is intended for advanced users who have experience with and knowledge of component wiring. Interested users include those who want to create more complex relationships between a page and its components and between the components themselves.

11.1 What You Should Know About Parameter and Event Wiring

You can use parameters and events to pass values from one component to another, or from a page to a component on that page. Additionally, you can pass values to page components by specifying them in the page's URL.

> **Note:** In this chapter, *component* refers collectively to UI components, such as buttons; layout components, such as hyperlinks; task flows; and portlets.

Value passing is useful for synchronizing the content of a page with its components, or the content of one component to another. For example, you can wire a Parameter Form portlet so that the event of clicking its **OK** button triggers the passing of its user-entered values to another component on the page. One way to apply this model is to pass a user-entered name to a task flow or portlet that displays details relevant to that name.

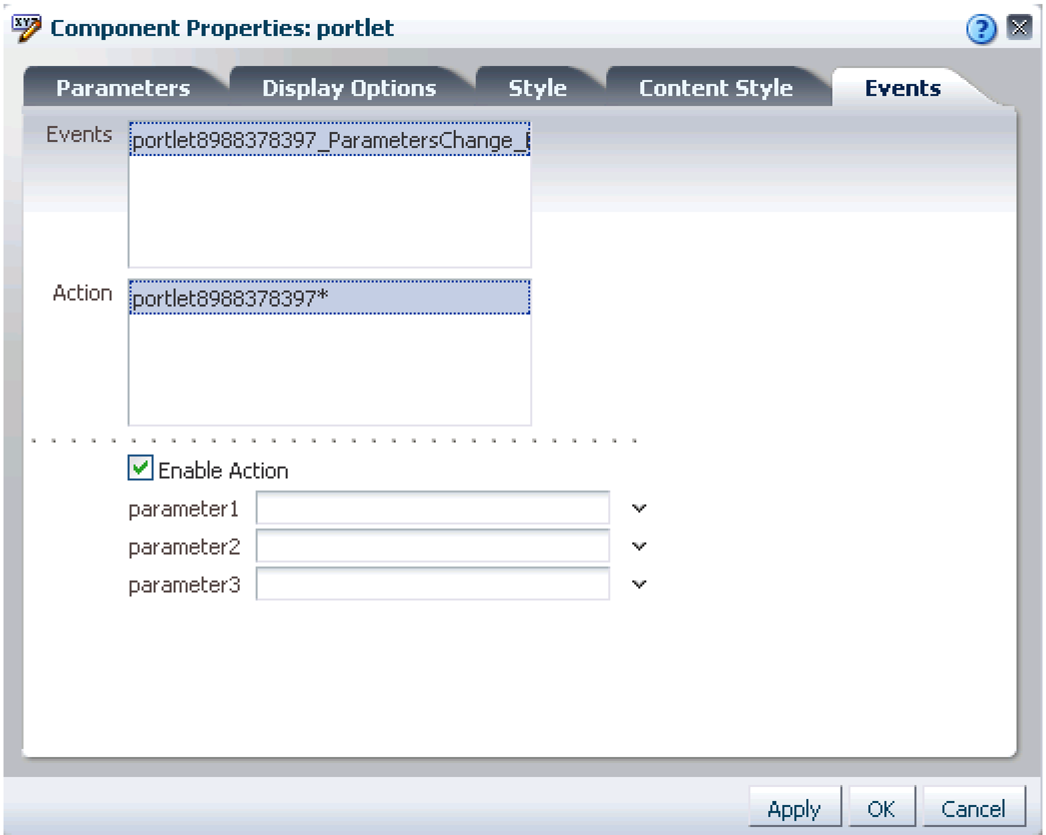
To clarify what it going on in a parameter passing scenario, it helps to think of one component as the producer and the other component as the consumer. The producer component provides the payload that the consumer component consumes. For example, a form portlet is typically a producer. Its payload is the data that users enter into the form. An event defined on the producer triggers the passing of the producer's payload to the consumer. Consumer components use the payload in various ways. For example, as a display string, a master in a master-detail relationship, and the like. How a consumer component uses the payload is specified in an event handler that was defined when the consumer component was created.

The heavy lifting required to produce meaningful parameter and event wiring is performed mostly at application and component design time. When developers build applications and components, they specify events and event maps in page definition files. Consequently, for runtime wiring to work, the components you want to wire must provide support for wiring through elements that were built-in at design time.

> **Note:** *Runtime* refers to the time when users run the application in a real-world environment. Contrast this with *design time*, which refers to the time developers build the application.

Runtime wiring creates a relationship between a producer event and a consumer event handler. You can create these relationships in Oracle Composer. Select a component and view its events support on the **Events** tab of the Component Properties dialog (Figure 11–1).

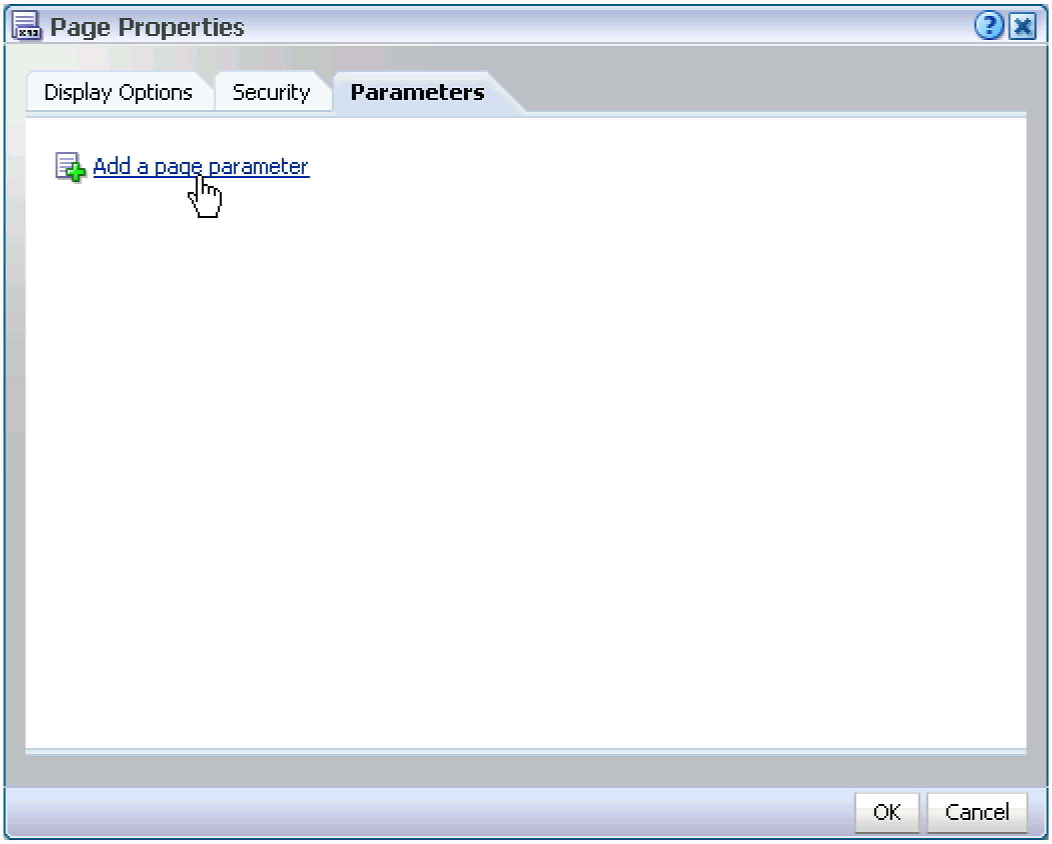
Figure 11–1 Events Tab in the Component Properties Dialog



Once you select and enable an event and an event handler (see the **Action** section in Figure 11–1), you can define the type of payload to deliver when the event is triggered.

Oracle Composer additionally provides an opportunity to create page parameters on the **Parameters** tab of the Page Properties dialog (Figure 11–2).

Figure 11–2 Parameters Tab in the Page Properties Dialog



Use the **Parameters** tab to create new page parameters and to revise existing page parameters. Create parameters that consume value types, including constants, EL expressions, page parameters, and page definition variables

You can easily configure page components to consume page parameters, and you can pass values to those parameters through the page URL.

11.2 Wiring One Component to Another

Components with built-in events and event handlers can be wired to each other to enable the passing of values from a producer component to a consumer component. This section describes how to set up such wiring. It includes the following subsections:

- Section 11.2.1, "Wiring a Task Flow to a Task Flow"
- Section 11.2.2, "Wiring a Portlet to a Portlet"
- Section 11.2.3, "Wiring a UI Component to a UI Component"
- Section 11.2.4, "Wiring a Portlet to a Task Flow"
- Section 11.2.5, "Wiring a Task Flow to a Portlet"
- Section 11.2.6, "Wiring a UI Component to a Task Flow"

11.2.1 Wiring a Task Flow to a Task Flow

In addition to seeded services and task flows, you can bring custom task flows into the WebCenter Spaces application. To bring custom task flows into WebCenter Spaces, you must first *portletize* them, so that they can be consumed by WebCenter Spaces across a *portlet bridge*.

Note: When you work with contextual event wiring across a portlet bridge and no payload or a null payload is propagated across the wire from the producer portlet to the consumer, such payloads are delivered as an empty string. If the consumer portlet is required to differentiate between an empty string and null, you can encode the null in the producer portlet payload. The consumer portlet consequently looks for this custom encoding to detect the null payload.

Custom task flows may support events and may include the capability of parameter passing. Events and parameter passing could enable one custom task flow to pass values to other custom task flows on the same page. For example, you could wire custom task flows so that when a user clicks a particular document, an event is raised that triggers parameter passing to the other custom task flows on the page. The passed parameters could cause the other custom task flows to rerender with content relevant to the clicked document.

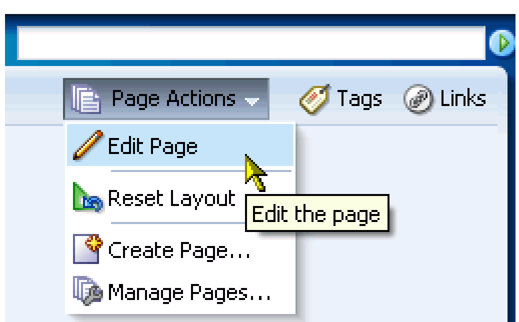
When event triggering and parameter passing are supported in a custom task flow, any wiring you undertake is done in Oracle Composer's Component Properties dialog. The events and parameters that you configure vary according to the functionality that developers build into custom task flows.

Creating and portletizing custom task flows and using the portlet bridge are all discussed in *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter*. For information about consuming custom task flows and other custom components in the WebCenter Spaces application, see *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter*.

To wire a task flow to a task flow:

1. Log in, and go to the page on which to wire two task flows to each other.
2. In WebCenter Spaces, select **Edit Page** from the the **Page Actions** menu (Figure 11–3)

Figure 11–3 Edit Page Command on the Page Actions Menu



   In a custom WebCenter application, open Oracle Composer in the manner designed for that application.

3. Click the **Edit** icon on the task flow that consumes the payload provided by the producer task flow.

   The Component Properties dialog opens.

4. Click the **Events** tab to bring it forward, and, from the **Events** pane, select an event associated with the producer task flow.

   The **Events** pane lists all of the events that can be raised from any component on the page. An asterisk (*) on an event indicates that an action is handling it.

5. In the **Actions** pane, select the action to execute when the event occurs.

   The **Actions** pane lists all of the event handlers associated with the consumer task flow that are supported by the selected producer task flow. Only those actions that can be invoked for the event that is selected in the **Events** pane are shown. An asterisk (*) on an action indicates that it is handling an event.

6. Select **Enable Action** to enable the selected event and action.

   An asterisk (*) appears next to the selected event and action. Value options appear below the check box.

7. From the displayed value options, select the type of value to use to deliver the payload from the producer task flow to the consumer task flow whenever the event occurs.

   Choose from:

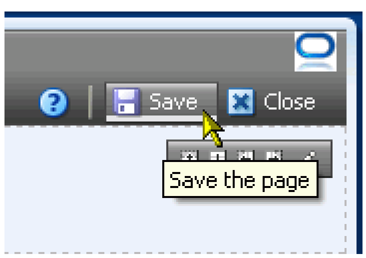
   - **Constant**—Select **Constant**, and enter a constant or EL expression value to pass to the consumer task flow.
   - **EventData**—Select to pass the variable `${payLoad}`, which delivers whatever payload is specified by the producer task flow.

   Note: The value for `${payLoad}` is specified when the task flow is created.

   ---

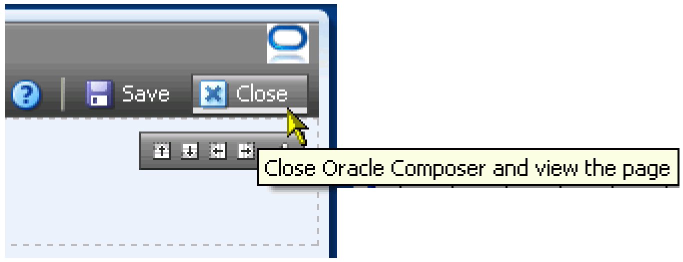
8. Click **Save** at the top right of Oracle Composer to save your changes (Figure 11–4).

Figure 11–4 The Save Button



9. Click **Close** to exit Oracle Composer (Figure 11–5).

Figure 11–5 The Close Button



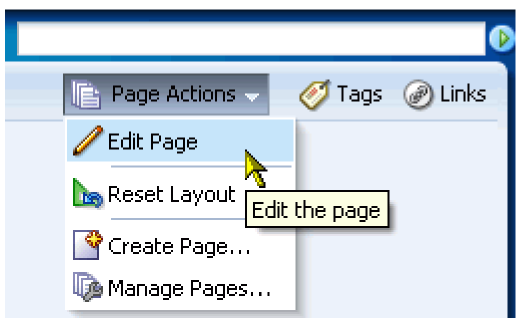
10. Test your wiring by triggering the event.

11.2.2 Wiring a Portlet to a Portlet

To wire a portlet to a portlet:

1. Log in, and go to the page on which to wire two portlets to each other.
2. In WebCenter Spaces, select **Edit Page** from the **Page Actions** menu (Figure 11–6)

Figure 11–6 Edit Page Command on the Page Actions Menu



   In a custom WebCenter application, open Oracle Composer in the manner designed for that application.
3. Click the **Edit** icon on the portlet that produces the payload to be consumed.

   The Component Properties dialog opens.
4. Click the **Display Options** tab to bring it forward.
5. Copy the value in the **Id** field, and click **OK**.

   You use this value later to ensure that changes in this portlet cause the consumer portlet to refresh.
6. Click the **Edit** icon on the portlet that consumes the payload provided by the producer portlet.

   The Component Properties dialog opens.
7. Click the **Display Options** tab to bring it forward.
8. In the **Partial Triggers** field, paste the portlet ID you copied earlier and click **Apply**.
9. Click the **Events** tab to bring it forward, and select an event associated with the producer portlet.

The **Events** pane lists all of the events that can be raised from any component on the page. An asterisk (*) on an event indicates that an action is handling it.

Events associated with the producer portlet contain the same ID that you pasted into the **Partial Triggers** field.

10. In the **Actions** pane, select the action to execute when the event occurs.

    The **Actions** pane lists all of the event handlers associated with the consumer portlet that are supported by the selected producer portlet. Only those actions that can be invoked for the event that is selected in the **Events** pane are shown. An asterisk (*) on an action indicates that it is handling an event.

11. Select **Enable Action** to enable the selected event and action.

    An asterisk (*) appears next to the selected event and action.

12. Provide values for the portlet parameters that now display at the bottom of the **Events** tab.

    Select **Constant**, and enter a composite data value, for example:

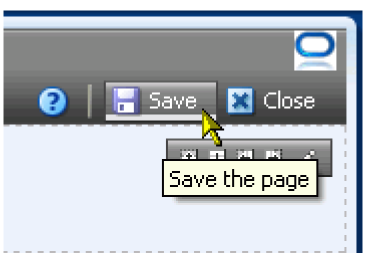
    ```
    ${payLoad.ora_wsrp_navigparam_Parameter1}
    ```

    Note: The parameter names and values were specified when the portlet was created.

    ---

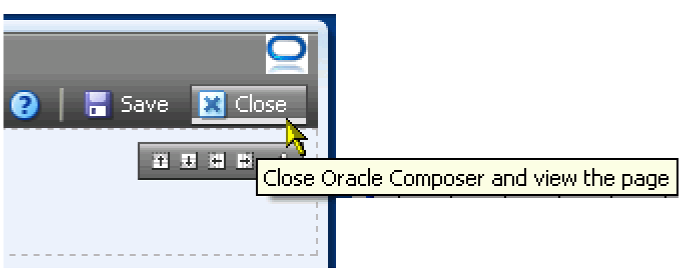
13. Click **Save** at the top right of Oracle Composer to save your changes (Figure 11–7).

Figure 11–7 The Save Button



14. Click **Close** to exit Oracle Composer (Figure 11–8).

Figure 11–8 The Close Button



15. Test your wiring by triggering the event.

11.2.3 Wiring a UI Component to a UI Component

This action is available to custom WebCenter applications only.

To wire a UI component to a UI component:

1. Log in, and go to the page on which to wire two user interface (UI) components to each other.
2. Open Oracle Composer in the manner designed for your WebCenter application.
3. Click the **Edit** icon on the UI component that consumes the payload provided by the producer UI component.

   The Component Properties dialog opens.
4. Click the **Events** tab to bring it forward, and select an event associated with the producer UI component in the **Events** pane.

   The **Events** pane lists all of the events that can be raised from any component on the page. An asterisk (*) on an event indicates that an action is handling it.
5. In the **Actions** pane, select the action to execute when the event occurs.

   The **Actions** pane lists all of the event handlers associated with the consumer UI component that are supported by the selected producer UI Component. Only those actions that can be invoked for the event that is selected in the **Events** pane are shown. An asterisk (*) on an action indicates that it is handling an event.
6. Select **Enable Action** to enable the selected event and action.

   An asterisk (*) appears next to the selected event and action. Value options appear below the check box.
7. Select the type of value to use to deliver the payload from the producer UI component to the consumer UI component whenever the event occurs.

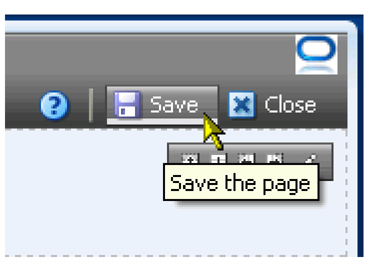
   Choose from:

   - **Constant**—Select **Constant**, and enter a constant or EL expression value to pass to the consumer UI component.
   - **EventData**—Select to pass the variable `${payLoad}`, which delivers whatever payload is specified by the producer UI component.

   Note: The value for `${payLoad}` was specified when the UI component was created.

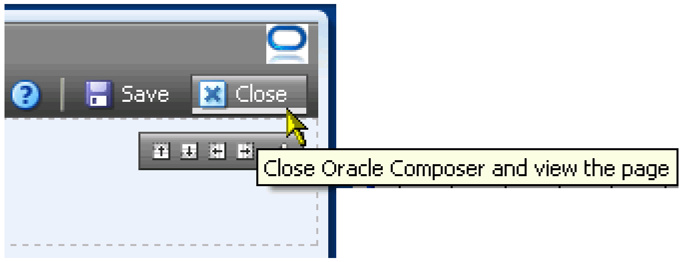
   ---
8. Click **Save** at the top right of Oracle Composer to save your changes (Figure 11–9).

Figure 11–9 The Save Button



9. Click **Close** to exit Oracle Composer (Figure 11–10).

Figure 11–10 The Close Button



10. Test your wiring by triggering the event.

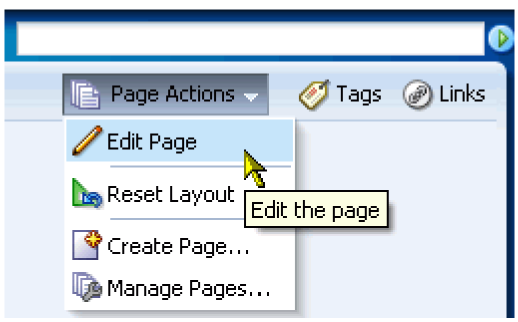
11.2.4 Wiring a Portlet to a Task Flow

In this scenario, the portlet is the producer, providing the event payload, and the task flow is the consumer of that payload.

To wire a portlet to a task flow:

1. Log in, and go to the page on which to wire a portlet to a task flow.
2. In WebCenter Spaces, select **Edit Page** from the **Page Actions** menu (Figure 11–11)

Figure 11–11 Edit Page Command on the Page Actions Menu



   In a custom WebCenter application, open Oracle Composer in the manner designed for that application.

3. Click the **Edit** icon on the task flow that consumes the payload provided by the producer portlet.

   The Component Properties dialog opens.

4. Click the **Events** tab to bring it forward, and select an event associated with the producer portlet from the **Events** pane.

   The **Events** pane lists all of the events that can be raised from any component on the page. An asterisk (*) on an event indicates that an action is handling it.

5. In the **Actions** pane, select the action to execute when the event occurs.

   The **Actions** pane lists all of the event handlers associated with the consumer task flow that are supported by the selected producer portlet. Only those actions that can be invoked for the event that is selected in the **Events** pane are shown. An asterisk (*) on an action indicates that it is handling an event.

6. Select **Enable Action** to enable the selected event and action.

   An asterisk (*) appears next to the selected event and action. Value options appear below the check box.

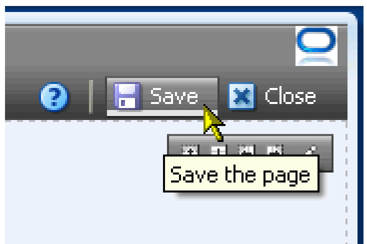
7. Select **Constant**, and enter a composite data value for a parameter associated with the producer portlet.

   For example:

   ```
   ${payLoad.ora_wsrp_navigparam_Parameter1}
   ```

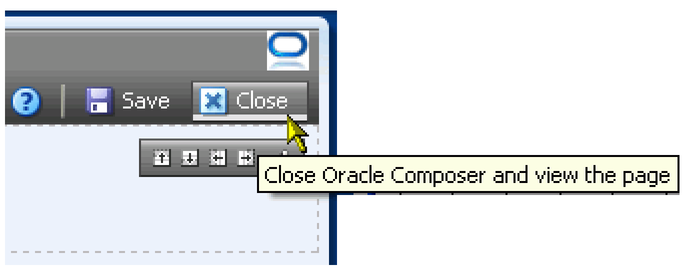
8. Click **Save** at the top right of Oracle Composer to save your changes (Figure 11–12).

Figure 11–12 The Save Button



9. Click **Close** to exit Oracle Composer (Figure 11–13).

Figure 11–13 The Close Button



10. Test your wiring by triggering the event.

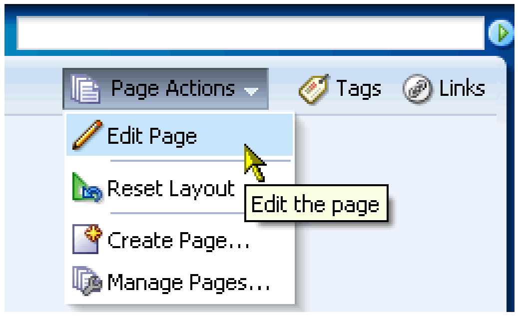
11.2.5 Wiring a Task Flow to a Portlet

In this scenario, the task flow is the producer, providing the event payload, and the portlet is the consumer of that payload.

To wire a task flow to a portlet:

1. Log in, and go to the page on which to wire a task flow to a portlet.
2. In WebCenter Spaces, select **Edit Page** from the **Page Actions** menu (Figure 11–14)

Figure 11–14 Edit Page Command on the Page Actions Menu



In a custom WebCenter application, open Oracle Composer in the manner designed for that application.

3. In the task flow header, click the **Edit** icon.

   The Component Properties dialog opens.

4. Click the **Display Options** tab to bring it forward.

5. Copy the value in the **Id** field and click **OK**.

   You use this value later to ensure that changes in this task flow cause the portlet to refresh.

6. Click the **Edit** icon on the portlet that consumes the payload provided by the producer task flow.

   The Component Properties dialog opens.

7. Click the **Display Options** tab to bring it forward.

8. In the **Partial Triggers** field, enter the task flow ID you copied earlier and click **Apply**.

9. Click the **Events** tab to bring it forward, and select an event associated with the producer task flow in the **Events** pane.

   The event contains the same ID that you pasted into the **Partial Triggers** field.

   The **Events** pane lists all of the events that can be raised from any component on the page. An asterisk (*) on an event indicates that an action is handling it.

10. In the **Actions** pane, select the action to execute when the event occurs.

    The **Actions** pane lists all of the event handlers associated with the consumer portlet that are supported by the selected producer task flow. Only those actions that can be invoked for the event that is selected in the **Events** pane are shown. An asterisk (*) on an action indicates that it is handling an event.

11. Select **Enable Action** to enable the selected event and action.

    An asterisk (*) appears next to the selected event and action.

12. Provide values for the portlet parameters that now appear at the bottom of the **Events** tab.

    Select **Constant**, and enter a composite data value, for example:

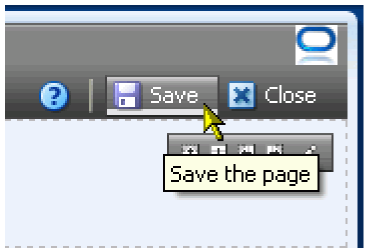
    ```
    ${payLoad.ora_wsrp_navigparam_Parameter1}
    ```

Note: The parameter names and values were specified when the portlet was created.

---

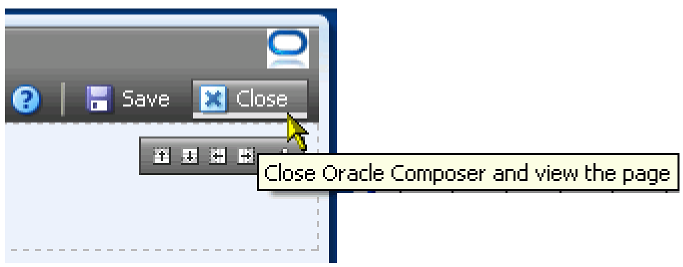
13. Click **Save** at the top right of Oracle Composer to save your changes (Figure 11–15).

Figure 11–15 The Save Button



14. Click **Close** to exit Oracle Composer (Figure 11–16).

Figure 11–16 The Close Button



15. Test your wiring by triggering the event.

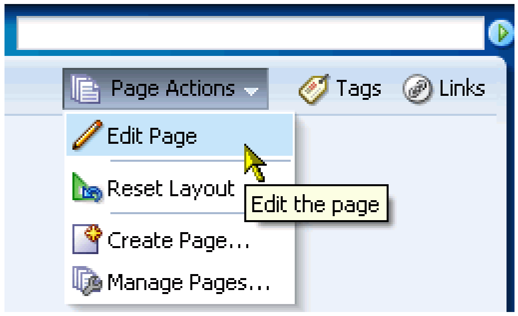
11.2.6 Wiring a UI Component to a Task Flow

In this scenario, the UI component is the producer of the payload, and the task flow is the consumer of the payload.

To wire a UI component to a task flow:

1. Log in, and go to the page on which to wire two user interface (UI) components to each other.
2. In WebCenter Spaces, select **Edit Page** from the **Page Actions** menu (Figure 11–17)

Figure 11–17 Edit Page Command on the Page Actions Menu



In a custom WebCenter application, open Oracle Composer in the manner designed for that application.

3. Click the **Edit** icon on the task flow that consumes the payload provided by the producer UI component.

   The Component Properties dialog opens.

4. Click the **Events** tab to bring it forward, and select an event associated with the producer UI component in the **Events** pane.

   The **Events** pane lists all of the events that can be raised from any component on the page. An asterisk (*) on an event indicates that an action is handling it.

5. In the **Actions** pane, select the action to execute when the event occurs.

   The **Actions** pane lists all of the event handlers associated with the consumer task flow that are supported by the selected producer UI Component. Only those actions that can be invoked for the event that is selected in the **Events** pane are shown. An asterisk (*) on an action indicates that it is handling an event.

6. Select **Enable Action** to enable the selected event and action.

   An asterisk (*) appears next to the selected event and action. Value options appear below the check box.

7. Select the type of value to use to deliver the payload from the producer UI component to the consumer task flow whenever the event occurs.

   Choose from:

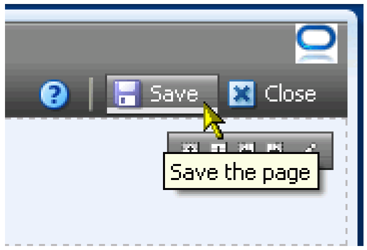
   - **Constant**—Select **Constant**, and enter a constant or EL expression value to pass to the consumer task flow.
   - **EventData**—Select to pass the variable `${payLoad}`, which delivers whatever payload is specified by the producer UI component.

   Note: The value for `${payLoad}` was specified when the UI component was created.

   ---

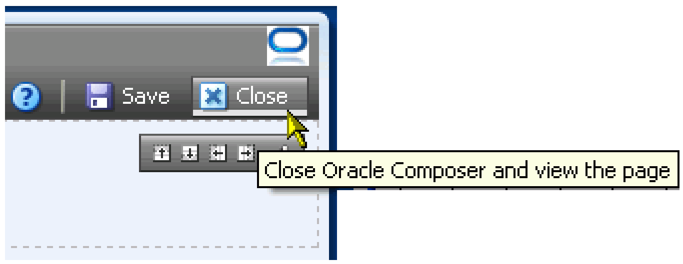
8. Click **Save** at the top right of Oracle Composer to save your changes (Figure 11–18).

Figure 11–18 The Save Button



9. Click **Close** to exit Oracle Composer (Figure 11–19).

Figure 11–19 The Close Button



10. Test your wiring by triggering the event.

11.3 Wiring Components and Page Parameters

Page parameters and page variables are central to the process of creating enterprise mashups. They enable communication between components and the pages that contain them.

For example, imagine a page that contains stock ticker and stock news components. You want the ticker and the news components to both consume the same parameter value so that they both show information for the same company. Page parameters and page variables are part of a simple mechanism for setting this up.

Page parameters provide a means of storing values for passing to page components that have been configured to consume them. Create page parameters through Oracle Composer at application runtime. Page variables contain output values that are produced by portlets. Page variables are created at application design time.

Consuming page variables is demonstrated in Section 11.4.4, "Wiring the Parameter Form and Display Portlets."

This section describes how to create and consume page parameters in the following subsections:

- Section 11.3.1, "Creating Page Parameters"
- Section 11.3.2, "Consuming Page Parameters"

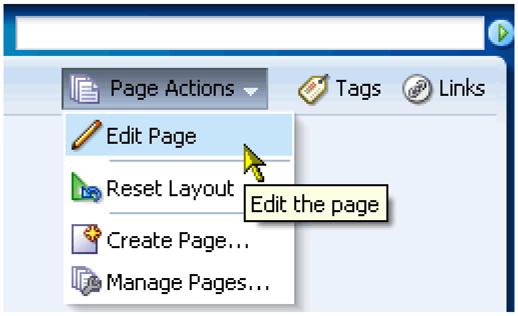
11.3.1 Creating Page Parameters

Use the **Parameters** tab in the Oracle Composer Page Properties dialog to create page parameters.

To create page parameters:

1. Log in, and go to the page where you want to create page parameters.
2. In WebCenter Spaces, select **Edit Page** from the **Page Actions** menu (Figure 11–20)

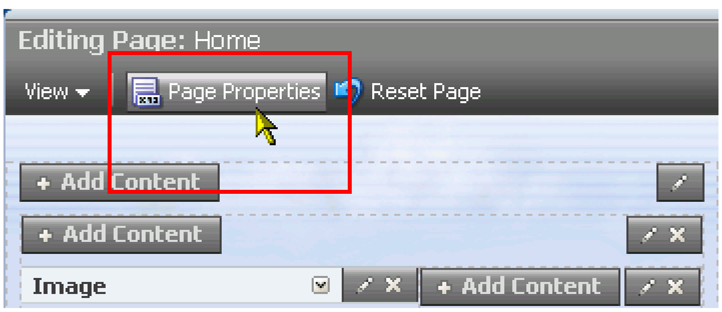
Figure 11–20 Edit Page Command on the Page Actions Menu



In a custom WebCenter application, open Oracle Composer in the manner designed for that application.

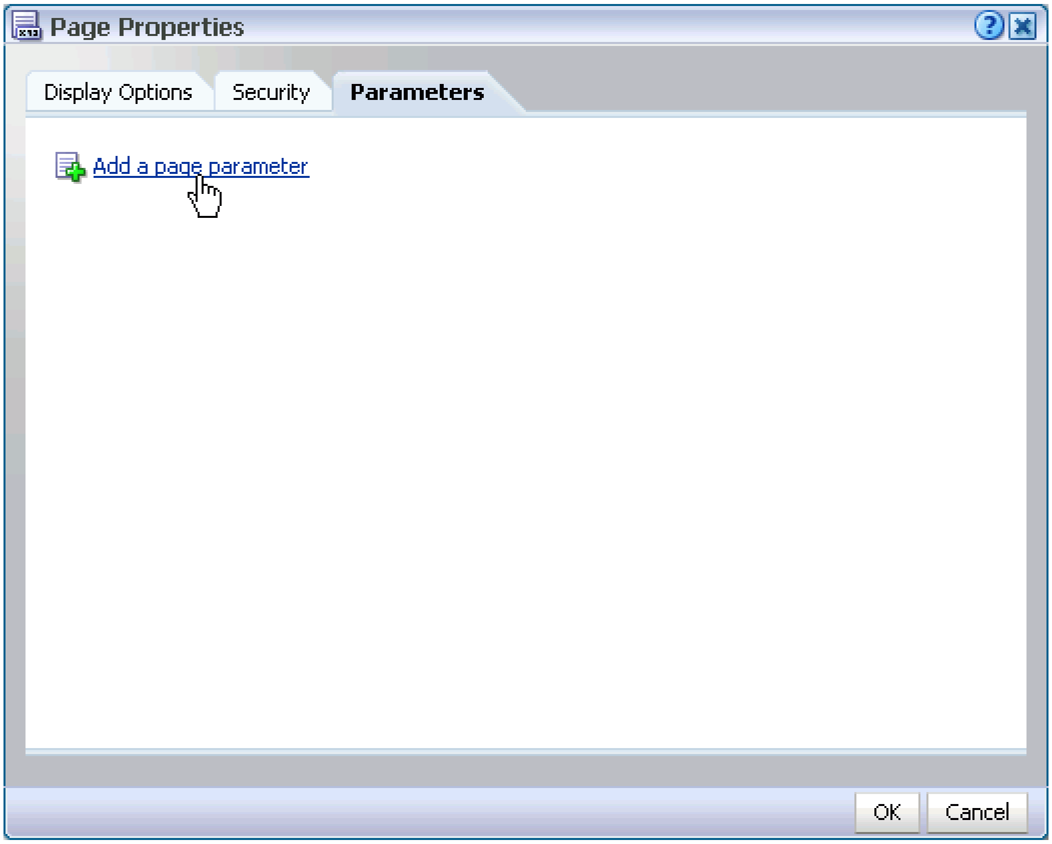
3. Click **Page Properties** to open the Page Properties dialog (Figure 11–21).

Figure 11–21 The Page Properties Button in Oracle Composer



The **Page Properties** dialog opens (Figure 11–22).

Figure 11–22 Page Properties Dialog



4. Click the **Parameters** tab to bring it forward, and then click the **Add a page parameter** link.

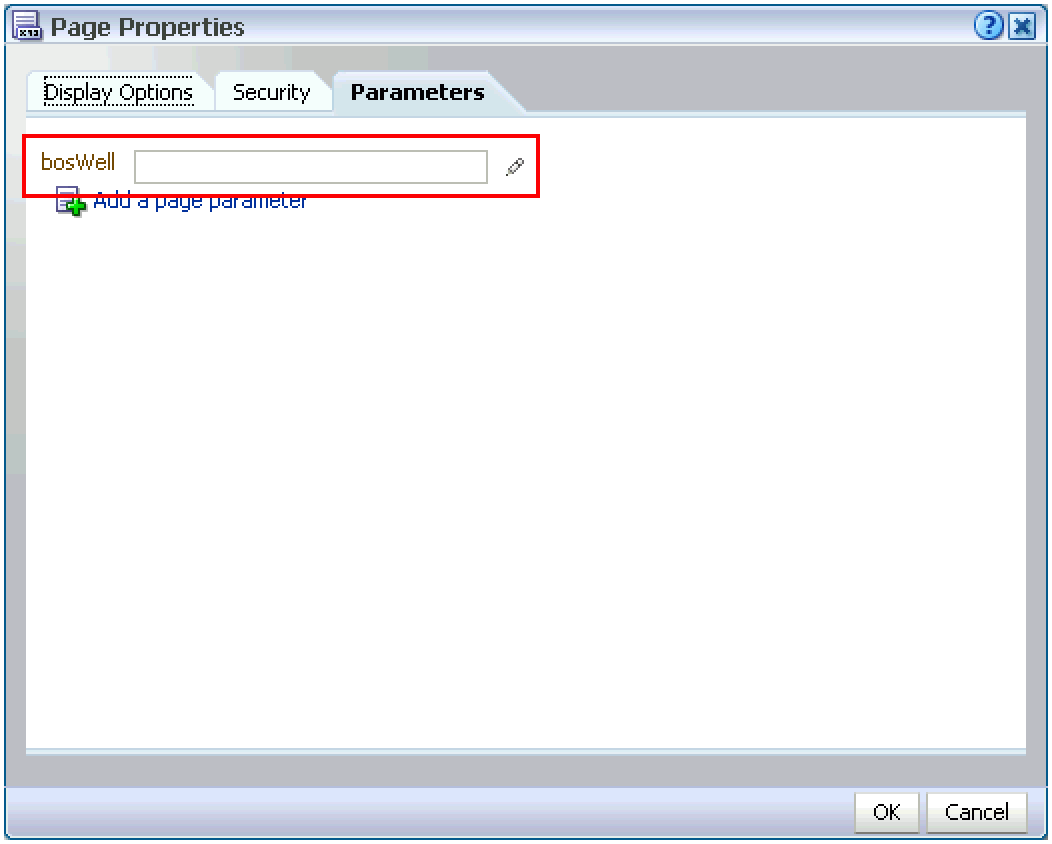
   The Add a Page Parameter dialog opens (Figure 11–23).

Figure 11–23 Add a Page Parameter Dialog

5. Enter a name for the new parameter, and then click **Add Parameter**.

   The parameter displays on the **Parameters** tab with a value entry field and an **Edit** icon for opening the Expressions Editor (for more information, see Section 10.4.5.1, "Introducing the Expression Builder") (Figure 11–24).

Figure 11–24 A New Parameter on the Parameters Tab



6. Open the EL Editor and select from prebuilt values under **Choose a value** or enter a value manually under **Type a value or expression**.

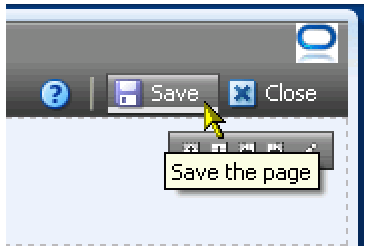
   For example, enter any of the following types of values:

   - **Constant**—Enter a specific, fixed value.
   - **Page Parameter**—Enter a page parameter to enable the page to take values through its URL.
   - **EL Expression**—Enter an EL expression to enable the page to take a value expressed through Expression Language (EL). For information about EL, see Section 10.4.5, "Using Expression Language (EL) Expressions with Component Properties."

     This option can provide a much more dynamic response. For example, the page could set a page parameter based on a component on the page. In this case, you would want the other components on the page to be refreshed whenever this value changed.

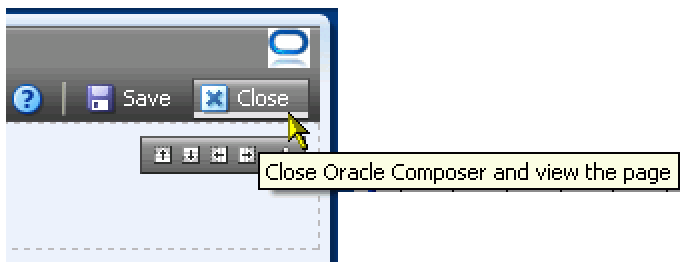
7. Click **Save** at the top right of Oracle Composer to save your changes (Figure 11–25).

Figure 11–25 The Save Button



8. As desired, repeat these steps to continue adding page parameters.
9. Click **Close** to exit Oracle Composer (Figure 11–26).

Figure 11–26 The Close Button



11.3.2 Consuming Page Parameters

In addition to wiring components to each other, you can wire them to *page parameters*. Page parameters are user-constructed name/value pairs for use in passing values to page components, such as task flows, portlets, and UI components.

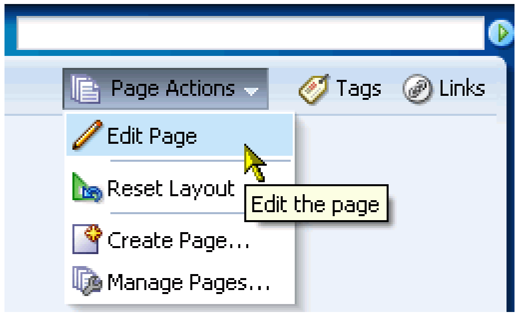
You can create page parameters and configure task flows and portlets to consume them. This section describes how to wire a task flow with a page parameter. For an example of wiring a portlet to a page parameter, see Section 11.4.4, "Wiring the Parameter Form and Display Portlets."

Note: Before you can take the steps outlined in this section, you must create a page parameter and provide it with a value. For more information, see Section 11.3.1, "Creating Page Parameters."

To wire a task flow to a page parameter:

1. Log in, and go to the page on which to wire a task flow to a page parameter.
2. In WebCenter Spaces, select **Edit Page** from the **Page Actions** menu (Figure 11–27)

Figure 11–27 Edit Page Command on the Page Actions Menu



In a custom WebCenter application, open Oracle Composer in the manner designed for that application.

3. Click the **Edit** icon on the task flow to be wired to a page parameter.

   The Component Properties dialog opens.

4. Click the **Parameters** tab to bring it forward.

5. Click the **Edit** icon next to the property that takes the parameter value.

   An editor opens, which you can use to provide the name of the page parameter.

6. Select **Choose a value**.

7. Under **Choose a value**, select **Page Parameter** from the first list, and the name of the relevant page parameter from the second.

8. Click **OK** to exit the editor.

9. Click **OK** to save your changes and exit the Component Properties dialog.

   The task flow is refreshed, now displaying the result of the value passed through the page parameter.

11.4 Working with the Parameter Form and Display Portlets

This section describes how to wire the Parameter Form and Parameter Display portlets to each other. It includes the following subsections:

- Section 11.4.1, "What You Should Know About the Parameter Form and Display Portlets"
- Section 11.4.2, "Adding the Parameter Form and Display Portlets to a Page"
- Section 11.4.3, "Customizing the Parameter Form Portlet"
- Section 11.4.4, "Wiring the Parameter Form and Display Portlets"

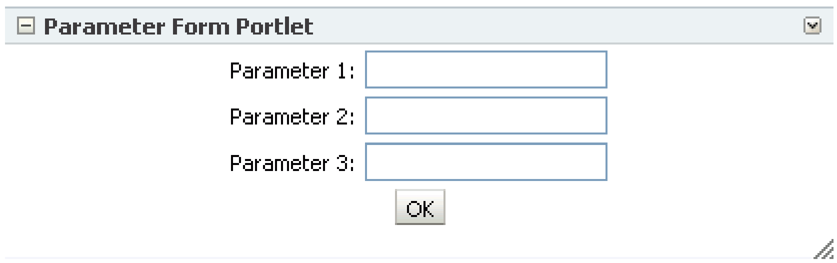
11.4.1 What You Should Know About the Parameter Form and Display Portlets

The Parameter Form and Parameter Display portlets provide a quick and easy way to pass values between components. They are provided by the WSRP Tools producer.

Note: The Parameter Form and Parameter Display portlets are available in your application only if your application administrator has registered the WSRP Tools producer with the application. If you cannot see these portlets, contact your administrator (for more information, see Section 2.8, "Contacting Your Application Administrator").

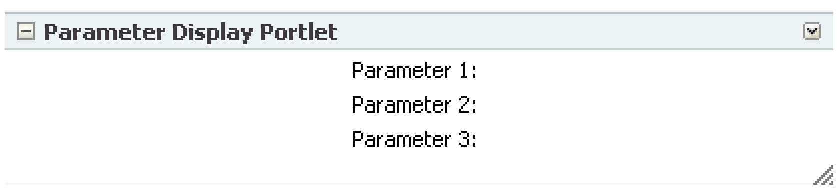
The Parameter Form portlet (Figure 11–28) has three output parameters that are set when values are submitted in the form inside the portlet. The parameters can then be used to drive the content of other portlets. You can customize the Parameter Form portlet to determine how many of the three fields are displayed on the form, depending on how many parameters you require.

Figure 11–28 Parameter Form Portlet



The Parameter Display portlet (Figure 11–29) enables you to quickly test the wiring from the Parameter Form portlet. However, typically you use the values passed from the Parameter Form portlet to drive the content of some other portlet—for example, to pass a ZIP code to a weather portlet, or a stock symbol to a stock ticker portlet.

Figure 11–29 Parameter Display Portlet



11.4.2 Adding the Parameter Form and Display Portlets to a Page

You add the Parameter Form and Parameter Display portlets to a page in the same way as you add any other portlet. For more information, see Section 10.1.5, "Adding Portlets to a Page."

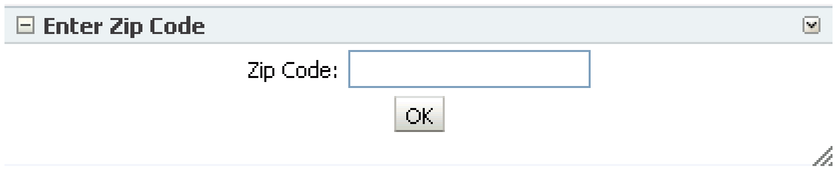
Note: The Parameter Form and Parameter Display portlets are available in your application only if your application administrator has registered the WSRP Tools producer with the application. If you cannot see these portlets, contact your administrator (for more information, see Section 2.8, "Contacting Your Application Administrator").

11.4.3 Customizing the Parameter Form Portlet

You can customize the Parameter Form portlet to give it a more meaningful title and to determine the number of fields displayed (up to a maximum of three).

Figure 11–30 shows a Parameter Form portlet that has been customized to display a single field that is used to provide a zip code that can be passed into a weather portlet.

Figure 11–30 Customized Parameter Form Portlet



To customize the Parameter Form portlet:

1. Log in, and go to the page that contains the Parameter Form portlet.
2. From the portlet's **Actions** menu, select **Customize**.
3. In the **Title** field, enter a title to describe what the portlet is for.
4. In the **Parameter 1 Prompt** field, enter text to describe what data you want users to enter into the field.
5. Repeat the step above for the **Parameter 2 Prompt** and **Parameter 3 Prompt** fields.

   You can clear one or both of these fields if you do not want them to display in the portlet.
6. Click **OK.**

11.4.4 Wiring the Parameter Form and Display Portlets

You can pass the values set in the Parameter Form portlet to the Parameter Display portlet to see how the wiring works. Typically, however, you use the Parameter Form portlet to pass data to some other portlet.

To wire the Parameter Form and Parameter Display portlets:

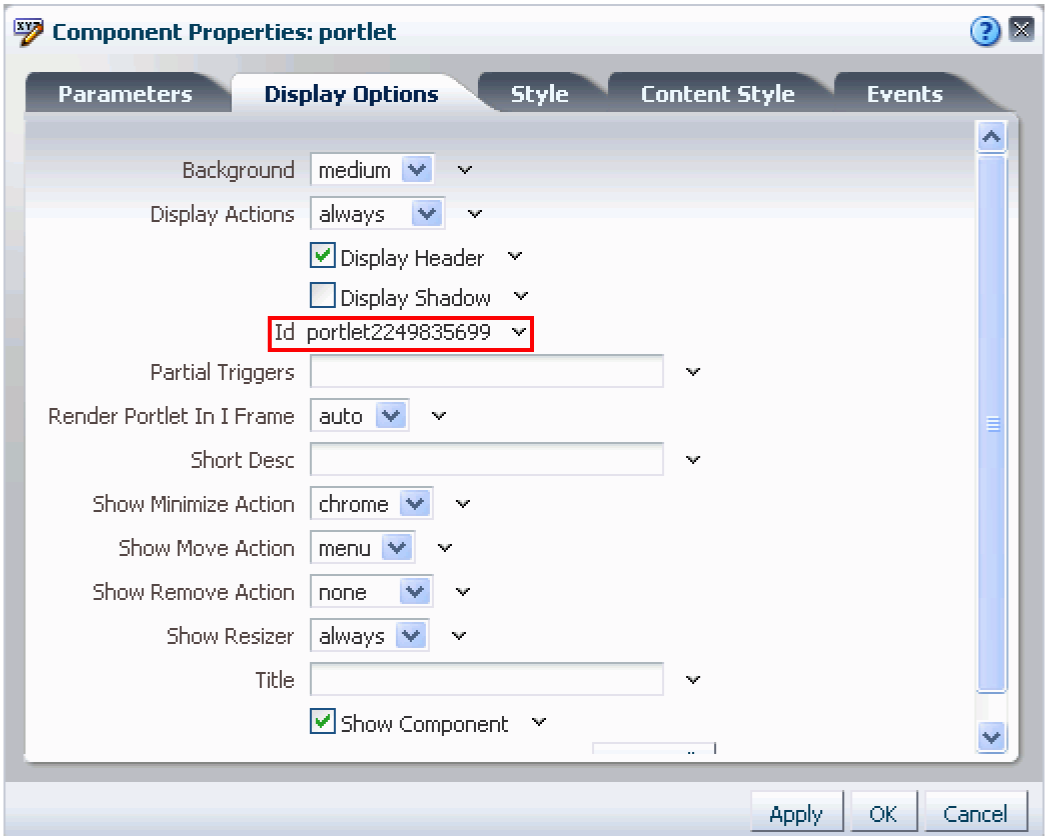
1. Log in, and go to the page that contains the Parameter Form and Parameter Display portlets.
2. In WebCenter Spaces, select **Edit Page** from the **Page Actions** menu.

   In a custom application, open Oracle Composer in the manner designed for that application.
3. In the Parameter Form portlet header, click the **Edit** icon.

   The Component Properties dialog opens.
4. Click the **Display Options** tab to bring it forward.
5. Make note of and copy the value in the **Id** field, and click **OK** (Figure 11–31).

   You use this value later to specify page variables and to ensure that changes in this portlet cause the Parameter Display portlet to refresh.

Figure 11–31 Parameter Form Portlet: Portlet ID



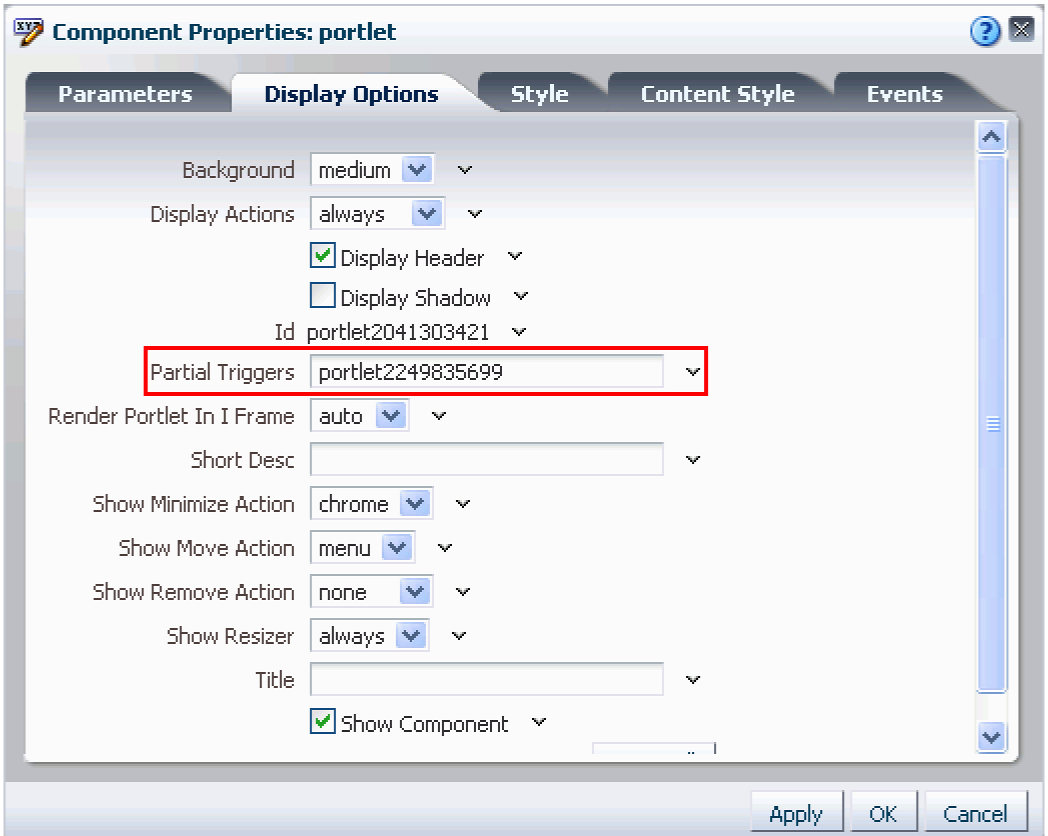
6. In the Parameter Display portlet, click the **Edit** icon.

   The Component Properties dialog opens.

7. Click the **Display Options** tab to bring it forward.

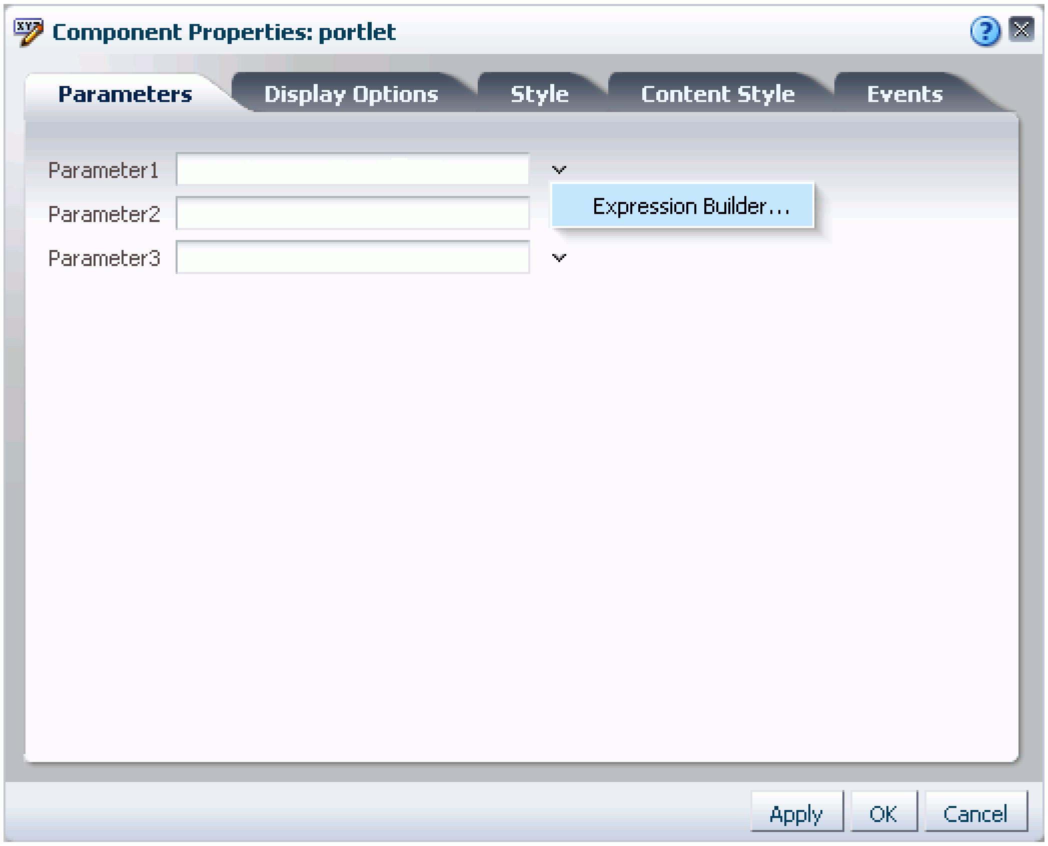
8. In the **Partial Triggers** field, enter the portlet ID you copied earlier and click **Apply** (Figure 11–32).

Figure 11–32 Parameter Display Portlet: Partial Triggers



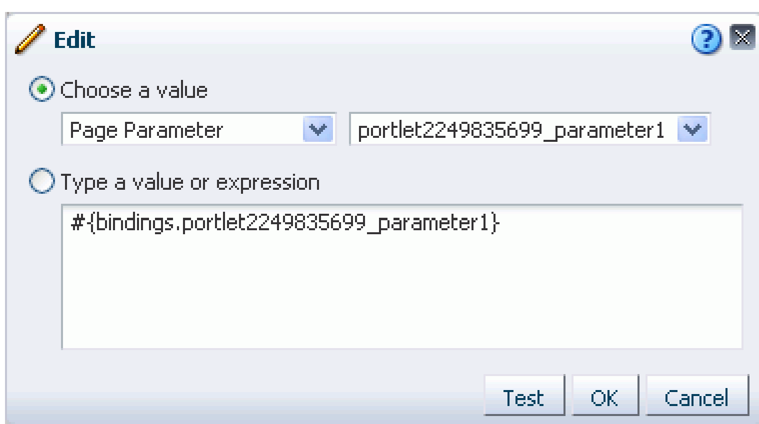
9. Click the **Parameters** tab to bring it forward.
10. Click the **Edit** icon next to the **Parameter1** field and choose **Expression Builder** (Figure 11–33).

Figure 11–33 Editing the Value of a Parameter



11. In the Edit dialog, select **Choose a value.**
12. From the first dropdown list, choose **Page Parameter.**
13. From the second dropdown list, choose the page parameter value set by the Parameter Form portlet to use to populate the **Parameter1** field in the Parameter Display field (Figure 11–34).

Figure 11–34 Specifying the Value of a Parameter

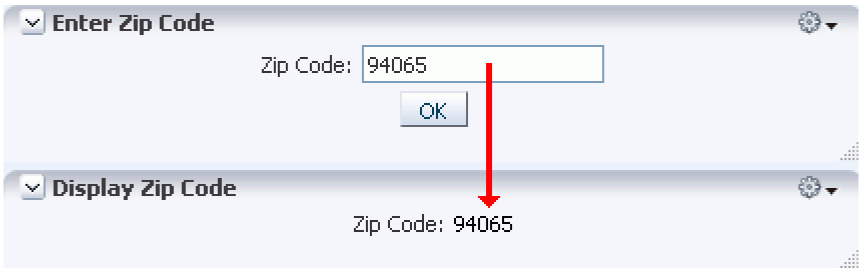


14. Click **Apply**.
15. If required, repeat these steps for the **Parameter2** and **Parameter3** fields.

16. Click **OK**.
17. Save your changes and close Oracle Composer.
18. In the Parameter Form portlet, enter a value in the first field and click **OK.**

    The Parameter Display portlet refreshes to display the value you entered in the Parameter Form portlet (Figure 11–35).

Figure 11–35 Parameter Display Portlet Wired to Parameter Form Portlet



11.5 Passing Parameter Values Through the Page URL

You can provide Expression Language (EL) expressions in lieu of other types of values to component parameters. This is discussed in Section 10.4.5, "Using Expression Language (EL) Expressions with Component Properties." You can take this capability one step further by passing parameter values with your page URLs.

This section provides one scenario, which you can use as a model for other parameter passing situations.

To pass parameter values through a page URL:

1. Log in, and go to the page that contains a component to which you want to pass values through the page URL.
2. Edit the relevant component's properties (for more information, see Section 10.4, "Setting Properties on Page Content").
3. Open the EL Editor for the Parameter or Display Option to which you want to pass a value (see Section 10.4.5.1, "Introducing the Expression Builder").
4. Under **Type a value or expression**, enter `#{param.val}`.
5. Save your changes.
6. To pass a value to the parameter, append the following to your page URL:

   ```
   ?val=value
   ```

   Where *`value`* represents the value you want to pass, for example, `true`, `medium`, or `Default`.

Part III

Working with WebCenter Spaces Group Spaces

Part III of this guide provides information about creating, configuring, managing, building memberships in, and removing group spaces. It contains the following chapters:

12 Understanding Group Space Basics

Group spaces support the formation and collaboration of project teams and communities of interest by providing a dedicated space for relevant services, pages, and content and by supporting the inclusion of specified members. Group spaces bring people together in a virtual environment for ongoing interaction and information sharing—in essence, group spaces enable the formation and support of social networks.

This chapter provides information about group spaces. It contains the following sections:

- Section 12.1, "What You Should Know About Group Spaces"
- Section 12.2, "Viewing Available Group Spaces"
- Section 12.3, "Subscribing to a Group Space"
- Section 12.4, "Unsubscribing from a Group Space"
- Section 12.5, "Requesting a Group Space Member Role Change"
- Section 12.6, "Interacting with Group Spaces Before Logging In (Public User)"

Audience

This chapter is intended for users who want to learn more about group spaces and how to access them in WebCenter Spaces.

> **See Also:** For general tasks associated with group spaces, refer to the following sections in Chapter 2, "Learning Your Way Around":
>
> - Section 2.5.4, "Opening Group Spaces"
>
>   Section 2.5.5, "Closing Group Spaces and Other Top-Level Tabs"
> - Section 2.6.2, "Accessing a Space or Page Actions Menu"
> - Section 2.6.3, "Sending a Message to Group Space Members or Moderators"
> - Section 2.6.4, "Exposing a Group Space Page in Your Personal Space"
> - Section 2.6.8, "Viewing Space and Page Information"
> - Section 2.6.9, "Obtaining a Group Space's Internal ID or a Group Space or Page's Direct URL"

12.1 What You Should Know About Group Spaces

Within any company, large groups or departments frequently must break into smaller groups to focus on a particular goal, project, or even topic. To help these groups organize themselves, WebCenter Spaces provides the notion of *group spaces*, which bring together small groups of people to share information and interact in a collaborative setting. For example:

- Internal departments within your company that must share common information, such as HR, Sales, and so on.
- Software projects that must bring together the efforts and input of Development, Quality Assurance, Product Management, Documentation, and Curriculum Development.
- Special interest groups that share a common interest in a particular topic.

Many features and tools to facilitate teamwork are built into the group space framework, instantly allowing group space members to share documents, discuss issues, schedule meetings, exchange messages, create lists, and much more. Group spaces can be monitored through RSS feeds, which you can add to your personal page or view in any external RSS reader.

WebCenter Spaces provides templates for creating group spaces that support different types of endeavors. For information about these templates, see Section 13.2, "What You Should Know About Group Space Templates".

When you create a group space, you are the group space *moderator*. As the moderator, you establish the rules for membership to a group space (see Section 15.1, "Setting Up the Group Space Membership Policy"). When a new group space is created, WebCenter Spaces creates default group space roles with default permissions. The group space moderator can assign group space members to these roles and modify the default permissions as required, or create new custom roles (see Section 15.2, "Managing Group Space Roles and Permissions" and Section 15.3, "Managing Members and Assigning Roles").

12.2 Viewing Available Group Spaces

WebCenter Spaces enables you to participate in multiple group spaces and manage your group space memberships through **My Group Spaces**, which displays all the group spaces and group space templates that are available to you. On the **Group Spaces** page in **My Group Spaces**, you can see a list of:

- Group spaces for which you are the moderator.
- Group spaces to which you subscribe.
- Group spaces that are marked by the moderator as discoverable.
- Group spaces that are public and available to non-WebCenter Spaces users.

See Section 14.8, "Managing Group Space Templates" for information about the **Templates** page in **My Group Spaces**.

To display a list of these group spaces:

1. Log in, and from the **Group Spaces** menu at the top of the application, select **My Group Spaces** (Figure 12–1).

Figure 12–1 The Group Spaces Menu

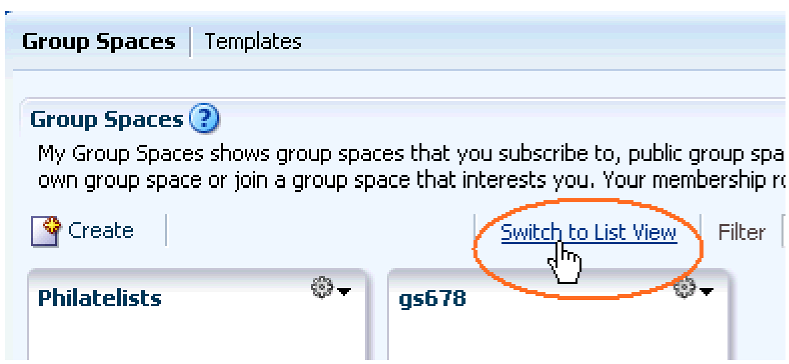
My Group Spaces displays the **Group Spaces** page (Figure 12–2).

Figure 12–2 My Group Spaces

The **Group Spaces** menu also offers quick access to all the group spaces to which you currently subscribe.

2. By default, the **Group Spaces** page displays your group spaces in card view. Click **Switch to List View** to toggle the display to list view.

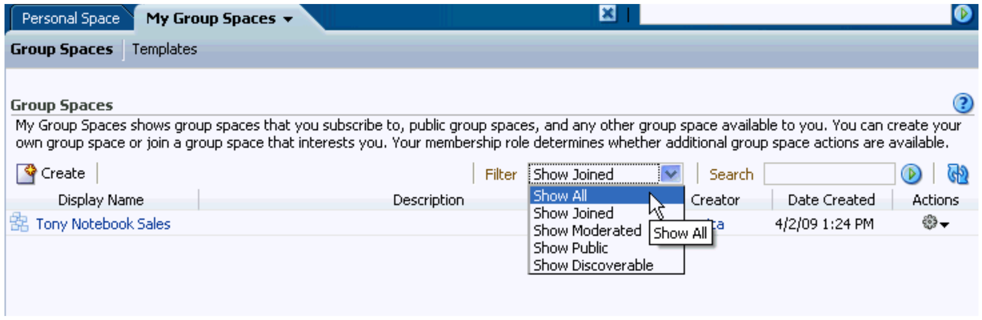
Figure 12–3 Switching Between Card View and List View



3. From the **Filter** list, select:

   - **Show All** (Figure 12–4) to display an unfiltered list of names of all group spaces.

Figure 12–4 Showing All Group Spaces

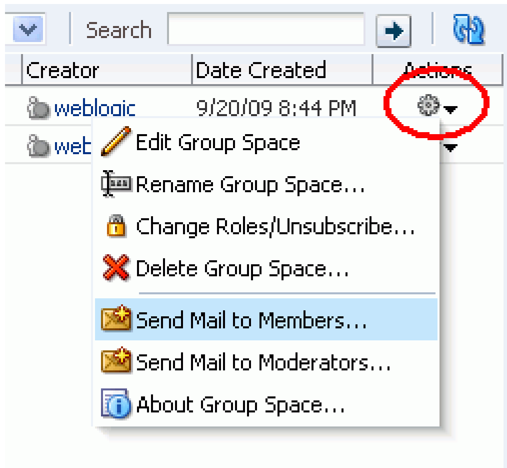


- **Show Joined** to display names of group spaces to which you subscribe.
- **Show Moderated** to display names of group spaces for which you have moderator privileges.
- **Show Public** to display names of group spaces that are available to anyone, even people who are not logged in to WebCenter Spaces.
- **Show Discoverable** to display the names of group spaces that have been made known to anyone logged in to WebCenter Spaces. A group space is made discoverable when the group space moderator enables **Discoverable** on the **Settings** tab's **General** page (see Section 13.12.1, "Making a Group Space Known (Discoverable)".

To join a group space, see Section 12.3, "Subscribing to a Group Space".

4. To list one or more specific group spaces, enter a full or partial search term in the **Search** field, then click the Search icon to refresh the list with all group spaces for which a match is found in the **Display Name**, **Description**, or Search Keywords (specified on the **Settings** tab's **General** page).
5. To clear the current search string and display all group spaces, click the Clear Search icon.
6. To refresh the list of group spaces, first ensure that any prior search is cleared (click the Clear Search icon), then click the Refresh icon.
7. Under **Actions**, click the Group Space Actions icon (Figure 12–5) for a selected group space to perform any of the following actions:

Figure 12–5 Group Space Actions Menu



– To manage the group space, select **Edit Group Space** to display the group space Settings pages. This option is available only to group space moderators and users granted the `Group Spaces-Manage` permission.

– To rename the group space, select **Rename Group Space** to display the Rename Group Space dialog box. Enter a new name for the group space, and click the Save icon. This option is available only to group space moderators and users granted the `Group Spaces-Manage` permission.

– To change your current membership role or unsubscribe, select **Change Roles/Unsubscribe** to display the Change Role or Unsubscribe dialog box. This option is available only to group space members.

– To permanently remove the group space from WebCenter Spaces, select **Delete Group Space**. This option is available only to group space moderators and users granted the `Group Spaces-Manage` permission.

– To send mail to all members or the moderator(s) of a group space, select **Email Members** or **Email Moderators**. These options are available only to group space members.

– To view information about the group space, select **About Group Space** to open the Group Space Information dialog box (Figure 12–7), which shows:

  – **Name**: Internal name of the group space. To change the internal group space name, click the Group Space Actions icon and select **Rename Group Space**. Caution: The group space's URL changes when you change the internal group space name. Bookmarks to the group space must be updated as they will no longer work.

  – **Display Name**: Display name of the group space. Display name of the group space. This name displays on the group space tab and other places where group spaces are available for selection. To change the **Display Name**, enter a new name on the **Settings** tab's **General** page. Changing the display name does not impact the URL that other people will use to navigate to the group space.

  – **Internal ID**: ID of the group space, which other applications might use to reference this group space.

  – **Description**: A description of the group space, as specified on the **Settings** tab's **General** page.

– **Membership**: Your role in the group space. A **Join Space** button displays if the group space allows self-subscription (see Section 15.1.1, "Managing Self-Subscription and Membership Changes for a Group Space"). Users can click **Join Space** to become a member of the group space. If this button button is inactive, users wanting to join the group space can contact the group space moderator directly to request membership (click the moderator's name in the **Creator** column to display a range of contact options).

– **Created By**: User name of the group space creator.

– **Date Created**: Date and time that the group space was created.

– **Direct URL**: URL that provides direct access to the group space.

12.3 Subscribing to a Group Space

To become a member of a group space, you can subscribe to (or join) the group space. You may be registered with WebCenter Spaces, or you may receive an invitation to join a group space when you are not registered with WebCenter Spaces.

This section includes the following subsections:

- Section 12.3.1, "Subscribing to a Group Space (Registered WebCenter Spaces User)"
- Section 12.3.2, "Subscribing to a Group Space (Unregistered WebCenter Spaces User)"

12.3.1 Subscribing to a Group Space (Registered WebCenter Spaces User)

Some group spaces allow WebCenter Spaces users to *self-subscribe*. This means that you can request membership to the group space.

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

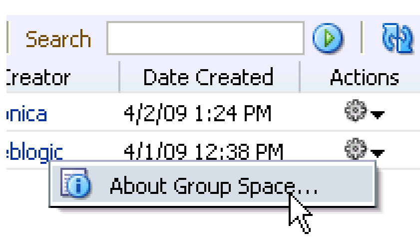
To subscribe to a group space:

1. Log in, and from the **Group Spaces** menu at the top of the application, select **My Group Spaces** to display the **Group Spaces** page.

2. From the **Filter** list, select **Show Discoverable**.

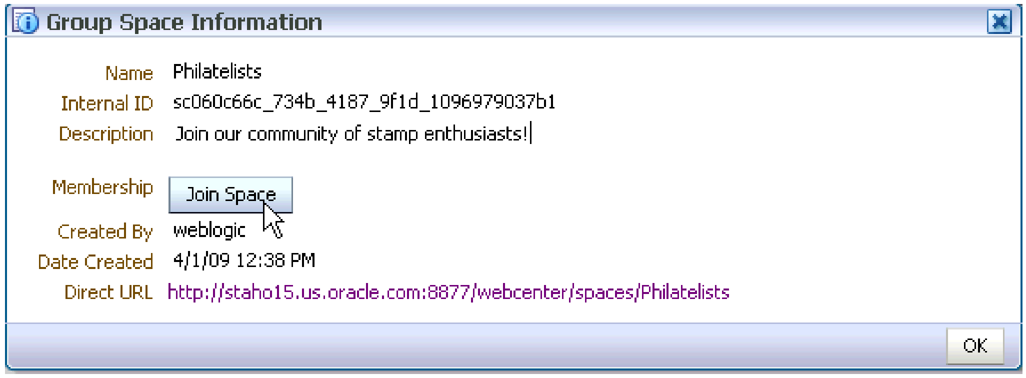
3. To subscribe to a group space, click the Actions icon and select **About Group Space** (Figure 12–6).

Figure 12–6 Opening the Group Space Information Dialog Box



4. In the Group Space Information dialog box, next to **Membership**, click **Join Space** (Figure 12–7).

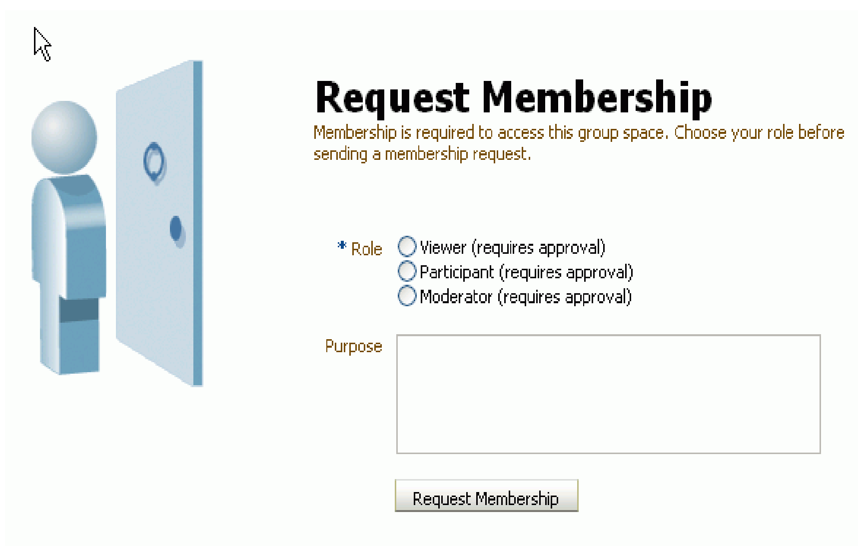
Figure 12–7 Group Space Information Dialog Box



Note: **Join Space** is active only if the group space allows self-subscription (see Section 15.1.1, "Managing Self-Subscription and Membership Changes for a Group Space"). If **Join Space** is disabled, contact the group space moderator directly to request membership (click the moderator's name in the **Creator** column to display a range of contact options).

A group space subscription page similar to Figure 12–8 opens, showing the default Self-Subscription page. Because the group space moderator may customize this page, the page and roles you see may be different to the example shown here.

Figure 12–8 Requesting Group Space Membership



5. Select the type of **Role** you want to play in this group space.

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

---

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

7. Click **Request Membership**.

   You should see a confirmation message similar to Figure 12–9 or Figure 12–10, depending on whether or not the selected role requires moderator approval.

Figure 12–9 Confirmation Message (Approval Required)

Figure 12–10 Confirmation Message (No Approval Required)

8. Click **OK**.

9. Refresh **My Group Spaces** (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. Click the group space **Display Name** to open the group space.

12.3.2 Subscribing to a Group Space (Unregistered WebCenter Spaces User)

If you do not have an account with WebCenter Spaces and you receive mail inviting you to join a group space, click the registration URL included in the mail message to accept the invitation. You will be prompted to register with WebCenter Spaces before gaining access to the group space.

To register with WebCenter Spaces and subscribe to a group space:

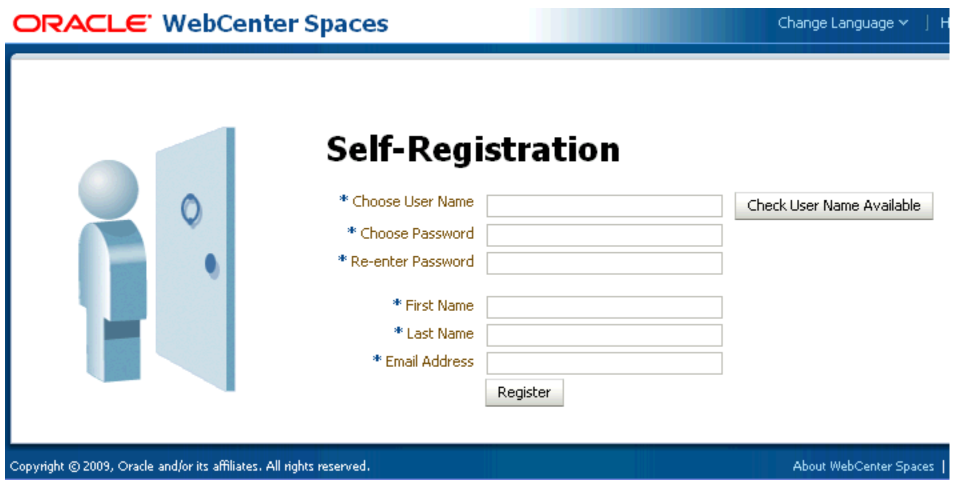
1. Click the **Register Yourself** link included in the invitation mail to open the Self-Registration page, similar to Figure 12–11. Because the group space moderator may customize this page, the page you see may be different to the example shown here.

Note: For the Self-Registration page to display, both of the following must be checked on the WebCenter Spaces Administration **General** page, under **Self-Registration**:

- **Allow Self-Registration Through Invitations**
- **Allow Public Users to Self-Register**

For more information, see "Allowing Self-Registration" and "Customizing the Self-Registration Page" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter*.

Figure 12–11 Registering with WebCenter Spaces



2. Choose a suitable **User Name**. The user name restrictions depend on the underlying identity store that is configured with WebCenter Spaces.

   Click **Check User Name Available** to determine whether a WebCenter 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 Spaces.
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 Spaces, the group space to which you were invited opens.

12.4 Unsubscribing from a Group Space

It is easy to unsubscribe from a group space when you no longer want or need membership.

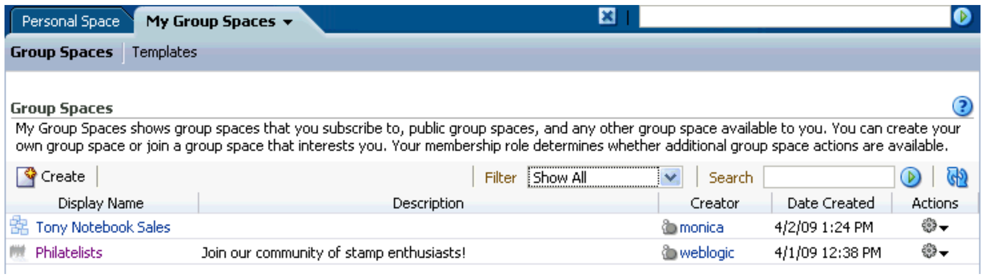
Some unsubscription requests require approval from the group space moderator so you may not be removed from the group space immediately. You will receive a Worklist notification when your membership is revoked.

Once you have successfully unsubscribed from a group space, it is removed from your **Group Spaces** menu.

To unsubscribe from a group space:

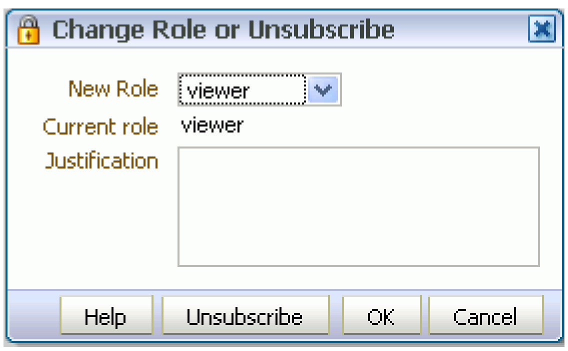
1. Log in, and from the **Group Spaces** menu at the top of the application, select **My Group Spaces** to display the **Group Spaces** page (Figure 12–12).

Figure 12–12 Group Spaces Page



2. To unsubscribe from a group space, click the Actions icon for the group space and select **Change Roles/Unsubscribe**.
3. The Change Role or Unsubscribe dialog box opens (Figure 12–13).

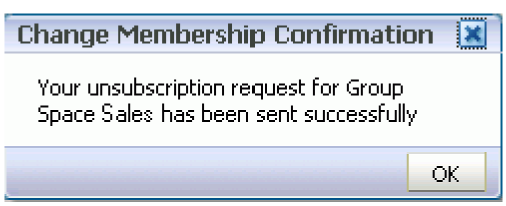
Figure 12–13 Unsubscribing from a Group Space



4. To remove yourself from the group space, click **Unsubscribe**.

   A confirmation message similar to Figure 12–14 displays.

Figure 12–14 Unsubscription Confirmation Message



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

If an unsubscription request requires approval, you are not removed from the group space immediately. Check back later or monitor your Worklist—you will receive notification when your unsubscription request is approved or rejected by the group space moderator.

12.5 Requesting a Group Space Member Role Change

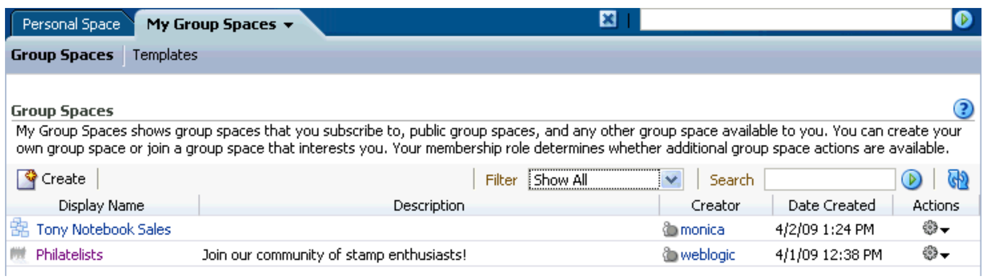
If you are unable to perform all the actions that you would like in your group space, you can request a change to your membership role. For example, you might want to participate in an interesting discussion thread or raise a new issue but in your current role you are only allowed to view ongoing discussions.

Role change requests may or may not require approval, depending on how the group space moderator has defined membership changes for a particular role. You will receive a Worklist notification when your new role is approved.

To change your group space role:

1. Log in, and from the **Group Spaces** menu at the top of the application, select **My Group Spaces** to display the **Group Spaces** page (Figure 12–15).

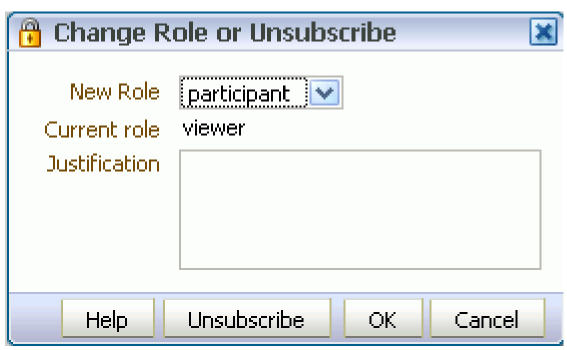
Figure 12–15 Group Spaces Page



2. To determine your current group space role, click the Actions icon, and select **About Group Space**. The **Membership** field indicates your current role in the group space. To change your role in a group space, click the Actions icon for the group space and select **Change Roles/Unsubscribe**.

   The Change Role or Unsubscribe dialog box opens (Figure 12–17).

Figure 12–16 Changing Your Group Space Role



3. Choose your preferred role from the **New Role** list.

   The group space moderator controls the list of roles displayed here. Out-of-the-box group space roles include `Viewer`, `Participant`, and `Moderator` but a subset of these or other custom roles may display.

4. Click **OK**.

   You should see a confirmation message similar to Figure 12–17. This message displays whether or not the selected role change requires approval.

Figure 12–17 Change Membership Confirmation Message

5. Click **OK** to acknowledge the confirmation message.
6. Click the Refresh icon to refresh **My Group Spaces** to confirm your membership status has changed.

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 group space moderator approves it.

12.6 Interacting with Group Spaces Before Logging In (Public User)

Public group spaces are available to anyone with Internet access, without logging in to WebCenter. A group space moderator can make an entire group space public, or restrict access to certain group space pages. The public information provided allows the group space to be shared with non-members and people outside of the WebCenter Spaces community.

You can access public group spaces:

- Directly, using the group space's URL.
- From the WebCenter Spaces Welcome page, if your installation is configured to display this page (Figure 12–18).

Figure 12–18 Public Group Spaces link on Welcome Page

The WebCenter Spaces administrator controls what a public user can see or do. Typically, public users have read-only (`View`) permissions, but administrators can grant additional privileges should this be required. For more information, see "Granting Permissions to the Public-User" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter*.

A role called `Public-User` is available by default for every group space. The group space moderator can control what the public user can see or do, overriding the public user permissions set by the administrator at the application level. For more information, see Section 13.12.3, "Granting Public Access to a Group Space".

13

Building Group Spaces

If you have been granted the `Group Spaces-Create` permission by the WebCenter Spaces administrator, you can create a group space using one of the out-of-the-box templates, your own custom templates, and published templates created by others.

This chapter contains the following sections:

- Section 13.1, "Who Is the Group Space Moderator?"
- Section 13.2, "What You Should Know About Group Space Templates"
- Section 13.3, "Creating a New Group Space"
- Section 13.4, "Managing a Group Space"
- Section 13.5, "Managing Group Space Pages"
- Section 13.6, "Customizing Standard Group Space Pages"
- Section 13.7, "Setting a Group Space Display Language"
- Section 13.8, "Applying a Look and Feel to a Group Space"
- Section 13.9, "Defining Custom Attributes for a Group Space"
- Section 13.10, "Creating Your Own Group Space Templates"
- Section 13.11, "Adding Wikis or Blogs"
- Section 13.12, "Making a Group Space Available"

Audience

This chapter is intended for users who want to create a group space or an environment dedicated to a group effort or an area of interest. You must have been granted the `Group Spaces-Create` permission by the WebCenter administrator to create group spaces of your own. For more information, see "Understanding User Permissions" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter*.

The rest of the chapter assumes that you, as group space owner, have the group space `Moderator` role or a custom role that includes the default permissions granted to a moderator. If additional permissions are required, it is noted in the affected section.

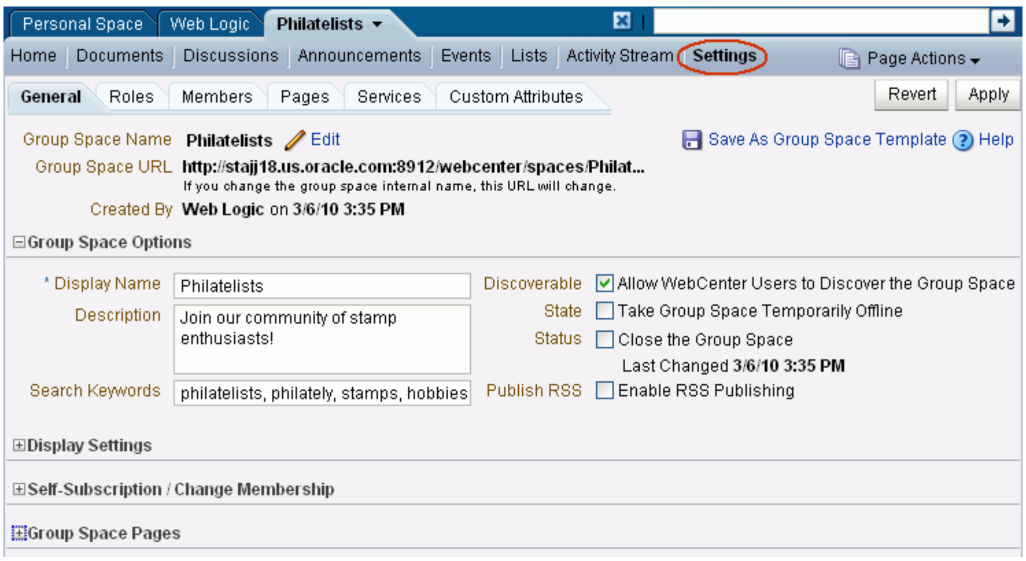
The WebCenter Spaces administrator has the authority to expose or hide some group space features and services. Contact your WebCenter Spaces administrator if some tasks discussed in this chapter are not available to you.

13.1 Who Is the Group Space Moderator?

When you create a group space, you become the default group space *moderator*. As a group space creator, you are given the group space `Moderator` role. In this role, you have full control over the group space presentation and content, as well as administrative responsibilities, as listed in Section 15.2.1.1, "Understanding the Default Group Space Roles".

All group space administration takes place on the pages of the **Settings** tab (Figure 13–1). Group space moderators and anyone granted the `Manage` or `Configure` permission on the group space can see the **Settings** tab and its pages—**General**, **Roles**, **Members**, **Pages**, **Services**, and **Custom Attributes**.

Figure 13–1 Group Space Settings Tab and Pages



The pages on the **Settings** tab allow group space moderators to perform the following tasks:

Page	Description
General	Use this page to set various group space properties. For more information, see: Section 13.6, "Customizing Standard Group Space Pages" Section 13.8.2, "Changing the Group Space Display Name" Section 13.8.3, "Changing the Group Space Icon" Section 13.8.4, "Changing the Group Space Logo" Section 13.8.5, "Applying a Group Space Site Template" Section 13.8.6, "Applying a Group Space Skin" Section 13.8.7, "Customizing Copyright and Privacy Statements" Section 13.10, "Creating Your Own Group Space Templates" Section 13.7, "Setting a Group Space Display Language" Section 13.12.1, "Making a Group Space Known (Discoverable)" Section 14.3.5, "Enabling or Disabling RSS News Feeds for a Group Space" Section 14.4, "Taking a Group Space Offline" Section 14.5, "Bringing a Group Space Back Online" Section 14.6, "Closing a Group Space" Section 15.1, "Setting Up the Group Space Membership Policy"
Roles	Use this page to manage member roles and permissions. For more information, see: Section 13.12.3.1, "Making a Group Space Public" Section 15.2, "Managing Group Space Roles and Permissions"
Members	Use this page to manage group space members and assign member roles. For more information, see: Section 15.3, "Managing Members and Assigning Roles"
Pages	Use this page to manage group space pages. For more information, see: Section 13.5, "Managing Group Space Pages" Section 13.8.1, "Choosing a Default Page Scheme and Style" Section 13.12.3.2, "Making Individual Group Space Pages Public"
Services	Use this page to enable and disable services operating in the group space; for example: Announcements, Discussions, Documents, Group Space Events, and Lists. For more information, see: Section 14.3.1, "Enabling and Disabling Services Available to a Group Space" Section 14.3.2, "Configuring a Custom Group Space Mail Distribution List" Section 14.3.3, "Specifying Where Group Space Discussions Are Stored" Section 14.3.4, "Publishing Group Space Mail in a Discussion Forum"
Custom Attributes	Use this page to define custom attributes for the group space. For more information, see: Section 13.9, "Defining Custom Attributes for a Group Space"

13.2 What You Should Know About Group Space Templates

When you create a group space, you can base its look and feel on a template, either provided out-of-the-box by WebCenter Spaces or a customized template that you design.

The following group space templates are provided out-of-the box:

- **Blank**. This template provides an essentially unpopulated, unconfigured starting point for building a group space exactly to your specifications. When you create a group space using this template, it results in a blank Home page. All group space services such as discussions, announcements, and so on, are disabled.

  This template is useful when you find that the pages and content supplied by the other templates do not suit your needs and you want to design your group space or group space template from scratch.

  By default, a single forum is created under the application root category for each new group space based on the Blank template. If you consider a category that supports multiple forums to be more suitable for the group space, you can set the Discussions server connection property `group.mapping` to `category` (see "Registering Discussions Servers Using Fusion Middleware Control" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter*). This setting takes effect when the Discussions service is provisioned.

- **Community of Interest**. This template is provided out-of-the-box to support people sharing a common area of interest, as opposed to collaborating to achieve a goal or complete a project. You can create a group space using this template, and optionally make modifications to create a customized template.

  The focus of a community of interest is to learn more about a subject area through the sharing of expertise, ideas, and content. Interest-based group spaces provide a consistent, dynamic, timely, and interactive participant experience. For example, all the Java programmers responsible for supporting your customer-facing Web site might want a place to keep up with what's happening in the Java world using discussion forums, links to articles about upcoming patches, and so on.

  A category and a default forum are created under the root category for each new group space based on the Community of Interest template. Additional forums are allowed.

- **Group Project**. This template is provided out-of-the-box to support team members united in completing a common task, such as a development project. You can create a group space using this template, and optionally make modifications to create a customized template.

  The focus of a project group space is to streamline the process of starting a new project, defining the project team, and executing on project deliverables. Members can share documents, communicate with one other, keep up to date on status, and just generally function better as a team than as individuals working side by side.

  A single forum is created under the root category for each new group space based on the Group Project template.

You can also create group space templates of your own (see Section 13.10, "Creating Your Own Group Space Templates").

By default, the group space template used determines whether a category or single forum is allocated on the discussions server for a particular group space (see Section 14.3.3, "Specifying Where Group Space Discussions Are Stored").

13.3 Creating a New Group Space

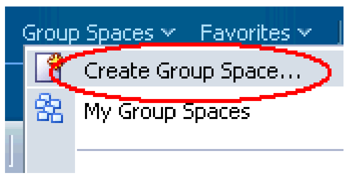
To create a group space:

1. Log in, and from the **Group Spaces** menu at the top of the application, select **Create Group Space** (Figure 13–2).

   If you do not see this option, ask your WebCenter Spaces administrator to grant you the `Group Spaces-Create` permission. For more information, see "Understanding User Permissions" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter*.

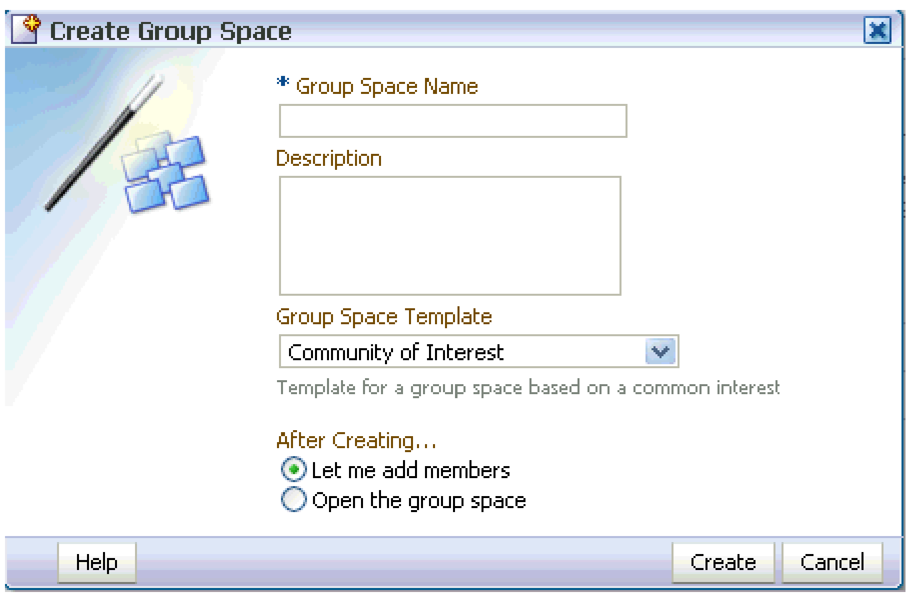
   Figs OK.

Figure 13–2 Group Spaces Menu



2. In the Create Group Space dialog (Figure 13–3), enter a **Group Space Name**.

Figure 13–3 Create Group Space Dialog



This name displays on the group space tab (at the same level as Personal Space). Group space names can contain alphanumeric characters, underscores, and spaces. The maximum allowable length is 200 characters. The following reserved keywords are not allowed as the full group space name either in upper or lowercase, or a combination of both—`webcenter`, `pages`, `page`, `spaces`, `space`, `group`, `groups`, `group space`, `group spaces`, `webcenter space`, `webcenter spaces`, `webcenter administration`, `my group spaces`, `admin`, `last`. These reserved words are allowable as part of a longer name (for example, `Sales Group`).

Note: WebCenter Spaces converts spaces in a group space name to underscores in the internal name. Thus, if you have created a group space named `My Group`, then try to create another group space named `My_Group`, WebCenter Spaces returns an error stating that a group space with that name exists.

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3. Enter a short **Description** explaining the purpose or objective of your group space.
4. Choose a **Group Space Template** from the list provided.

   Three templates are provided out-of-the-box—Blank, Community of Interest, and Group Project (see Section 13.2, "What You Should Know About Group Space Templates"). Other custom templates specific to your WebCenter application may be listed here too (see Section 13.10, "Creating Your Own Group Space Templates").

   When you create a new group space based on a template that is defined to use a specific language, site template, or skin:

   - The language is not inherited by the new group space. To set a group space language, see Section 13.7, "Setting a Group Space Display Language."
   - The site template and skin are inherited by the new group space. To set a new group space site template or skin, see Section 13.8.5, "Applying a Group Space Site Template" and Section 13.8.6, "Applying a Group Space Skin."

   Note: When you select a template on which to base a new group space, then subsequently the template is made private by another user before you have completed creating the group space, the template remains valid for your use while you are still creating the group space.

   ---

5. Select one of the following:
   - **Let me add members** to display the group space **Member** page after you click **Create**. From here you can add or invite members to join your group space. See Section 15.3, "Managing Members and Assigning Roles".
   - **Open the group space** to display the group space **Home** page after you click **Create**. You may prefer to develop the group space content before inviting any members.

     Later, when you are ready, you can set up the group space membership policy. See Section 15, "Managing Group Space Members and Roles".
6. Click **Create**.

13.4 Managing a Group Space

Moderators and group space members given a role that is granted the appropriate group space and group space page permissions can manage the group space in the following ways:

- Add and administer group space pages, which display the group space content. See Section 13.5, "Managing Group Space Pages".

- Customize the standard pages that users see when they open the group space, attempt to subscribe to the group space, do not have access to the group space, and so on. See Section 13.6, "Customizing Standard Group Space Pages".
- Set the default language for the group space. See Section 13.7, "Setting a Group Space Display Language"
- Apply templates, colors, styles, icons, and logos to "brand" group space pages with a specific look and feel. See Section 13.8, "Applying a Look and Feel to a Group Space".
- Add custom attributes that are unique to the group space and its characteristics. See Section 13.9, "Defining Custom Attributes for a Group Space".
- Create new templates, based on the group space. See Section 13.10, "Creating Your Own Group Space Templates".
- Include wikis and blogs on group space pages. See Section 13.11, "Adding Wikis or Blogs".
- Make the group space discoverable only by other WebCenter users, or publicly available. See Section 13.12, "Making a Group Space Available".

13.5 Managing Group Space Pages

The tabs along the top of a group space identify and provide access to the group space pages. A group space shows or hides its pages as specified in the Manages Pages dialog (for your personal view), or the **Pages** page (for all group space members).

Group space members with appropriate privileges (see Table 15–2) can create new pages for the group space, and add content to those pages. The content on a group space page is typically targeted to a particular audience or objective. For detailed information about working with pages, see Part II, "Working with WebCenter Spaces Pages". For information about adding content to a group space page, see Section 10.1, "Adding Content to a Page."

This section provides steps to manage the pages in your group space. Moderators and group space members with appropriate privileges can manage group space pages in two ways:

- On any page of the group space, any group space member (viewers, participants, or moderators) can click **Page Actions**, then select **Manage Pages** (Figure 13–4) to open the Manage Pages dialog (Figure 13–5) to personalize their environment.

Figure 13–4 Page Actions Menu

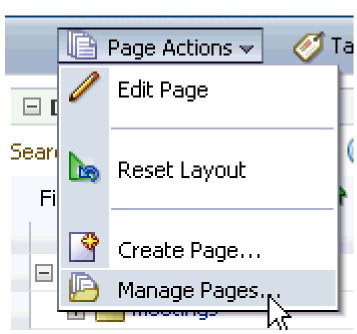
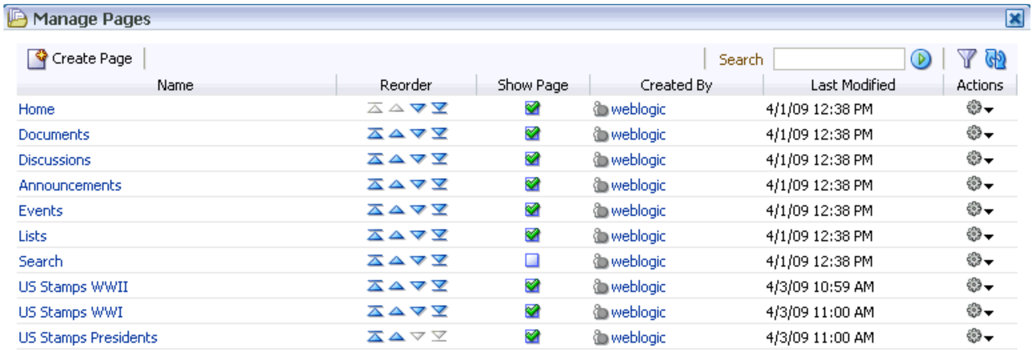


Figure 13–5 Manage Pages Dialog

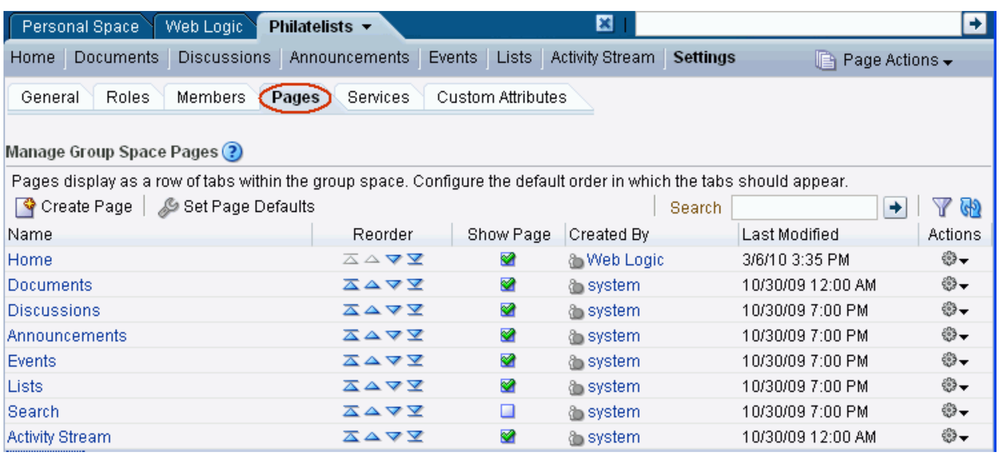


The actions available in the Manage Pages dialog depend on your privileges the group space.

Any changes you make to group space page preferences in the Manage Pages dialog apply only to your personal view, and not to anyone else who has access privileges to those pages. This behavior is similar to the Manage Pages dialog for personal pages, as described in Chapter 7, "Managing Pages". Note that the results of some operations such as page editing, deleting, copying, and renaming are visible to all members in the group space.

- Anyone with `Group Space Services-Full Access` permission (see Table 15–2, " Group Space Permissions") can manage group spaces pages on the **Pages** page (Figure 13–6).

Figure 13–6 Group Space Pages Page



Any changes made to group space page preferences on the **Pages** page apply to everyone who has access privileges to those pages, allowing moderators to configure the default page settings for the group space. Managing group space pages on the **Pages** page is similar to managing page defaults for personal pages, as described in "Setting Up a Default Look and Feel for Personal Pages" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter*.

Note: If you view a page at the same time that another user is editing the page, you may not immediately see the results of changes made by the other user in your session. To reliably see any changes, you must view the page after the other user has saved their edits.

To view and manage pages belonging to a group space:

1. Click the **Settings** tab, then the **Pages** tab.
2. On the **Pages** page, perform any of the following tasks:
   - To create a page in the group space, click **Create Page** to display the Create Page dialog, where you can specify the name, scheme, background color, and style for the new page. Take care when naming your group space pages if you intend to share them, as pages in the same group space that share the same name also share the same pretty URL. For example, if Asok and Pat both create a page named `Tasks` in a group space called `Finance`, the pretty URL for both pages is: `http://<host>:<port>/webcenter/spaces/Finance/page/Tasks`. If a user is given access to both pages, they can view only one them. For example, if Monica is granted access to both pages the following may occur:
     – If Asok shares his `Tasks` page with Monica: Monica sees Asok's page.
     – If Asok shares his `Tasks` page with Pat: Pat sees his own page, but not Asok's.
     – If Pat now shares his `Tasks` page with Monica: Monica sees Asok's page (as she saw it first), not Pat's.

     For detailed information about each selection, see Section 8.1, "Creating Pages".

     If you have previously specified (in the Set Page Defaults dialog) that page defaults should always be used for new pages, the new page is immediately created with the preset defaults, skipping the Create Page dialog.

     New group space pages by default display as a new tab for all group space members with roles that have permissions to view pages.
   - To select a default look and feel for group space pages, click **Set Page Defaults** to display the Set Page Defaults dialog, where you can specify the default scheme, style, and background color for group space pages. For detailed information about each selection, see Section 7.5, "Setting Page Creation Defaults for Your Personal Pages".
   - To list one or more specific group space pages, enter a full or partial search term in the **Search** field, then click the **Search** icon to refresh the list with all group space pages for which a match is found in the **Name** or **Created By**. To clear the current search string and display all group space pages, click the **Clear Search** icon.
   - To display a filter panel above the page list to enable you to display a subset of pages by **Name** or **Created By**, click the **Filter** icon. For more information about filtering, see Section 7.3.2, "Filtering Your View of Pages in the Manage Pages Dialog".
   - To refresh the list of pages, first ensure that any prior search is cleared (click the **Clear Search** icon), and no filter is specified in the filter panel, then click the **Refresh** icon.

- To change the order in which the pages display, click the **Reorder** icons. For more information about reordering pages, see Section 7.4, "Changing the Order of Pages Through the Manage Pages Dialog".
- To display a page as a tab in the group space, click the **Show Page** check box for that page to show a green check mark, and clear the check box to hide the page.

Note: If you clear the **Show Page** check box for the currently active page displayed on your screen, the Manage Pages dialog closes immediately as the page is hidden.

- Under **Actions**, click the **Actions** icon for a selected page to perform any of the following actions:
  - To add and edit the content on the page, select **Edit Page** to display the page in Oracle Composer.
  - To make a copy of the page, select **Copy Page** to open the Copy Page dialog. Enter a name for the new page, and click **OK**.

Note: You must have the `Group Space Services-Full Access` permission (see Table 15–2, " Group Space Permissions")to copy a page. If you have not been granted this permission, then the **Copy Page** selection is not available to you.

  - To rename the page, select **Rename Page** to open the Rename Page dialog. Enter a new name for the page, and click the **Save** icon.
  - To modify user access to a page, select **Set Page Access** to open the Set Page Access dialog where you can set permissions for available user roles. The steps are similar to those described in Section 7.7, "Setting and Revoking Page Access Permissions".
  - To remove a page from the group space, select **Delete Page** to display the Delete Page dialog.
  - To give read-only access to a specific page in a public group space, select **Make Public**. This selection is active only if the `Public-User` role has been given permission to access the group space on the **Roles** page (see Section 13.12.3.1, "Making a Group Space Public"). This automatically assigns the `Public-User` role View Page privileges (shown as `anonymous-role` in the Set Page Access dialog). To give the `Public-User` role higher access privileges (Edit Page, Delete Page, Perform All Page Actions, or Personalize Page), select **Set Page Access** to specify these permissions in the Set Page Access dialog for `anonymous-role`. If you want to make the entire group space public, rather than specific pages, you can make all pages public by granting the `Public-User` role access to the group space as well as permissions for all pages on the Roles page.
  - To restrict the page access to group space members only, select **Remove Public Access**. This selection is active only if the `Public-User` role has been given permission to access the group space on the **Roles** page (see Section 13.12.3.1, "Making a Group Space Public").

– To add the group space page to the list of pages in your personal space, select **Add to Personal Space**. If you add a group space page to your personal space, the page scope remains that of the group space. For more information, see Section 2.6.4, "Exposing a Group Space Page in Your Personal Space."

– To send mail to all members of the group space who have access to the page, select **Mail**.

To view the printable version of the page, select **Print Preview**.

– To view information about the page, select **About This Page** to open the Page Information dialog, which shows Name, Created By, Date Created, Last Modified, and Direct URL.

13.6 Customizing Standard Group Space Pages

The following customizable default pages are provided with every group space:

- Home page
- Self-Subscription page
- Unauthorized Access page
- Group Space Unavailable page

The default content of these pages is derived from the template on which the group space is based. If required, the group space moderator may customize the content of all these pages, as described in the following sections:

- Section 13.6.1, "Customizing the Home Page"
- Section 13.6.2, "Customizing the Self-Subscription Page"
- Section 13.6.3, "Customizing the Unauthorized Access Page"
- Section 13.6.4, "Customizing the Group Space Unavailable Page"

13.6.1 Customizing the Home Page

The group space Home page is the starting point for most members and visitors. The group space moderator can use the Home page to welcome visitors, advertise group space objectives, highlight important information, and to launch group space content and activities.

Home pages are not mandatory. Most group space templates provide a default Home page, which the moderator can edit or delete as for any other page in the group space. See Section 13.5, "Managing Group Space Pages".

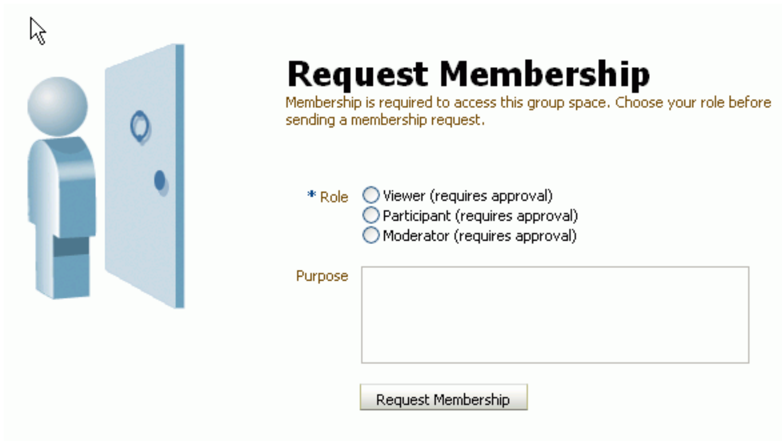
13.6.2 Customizing the Self-Subscription Page

The Self-Subscription page allows users to subscribe to a group space. Self-subscription is useful when the moderator wants other people to discover and join the group space. Communities of interest are particularly suited to this form of member enrollment as the group space often reaches a wider audience.

Figure 13–7 shows the Self-Subscription page supplied out-of-the-box. This is the default page for group spaces based on built-in templates. The default page might be different for group spaces based on other templates.

As a group space moderator, you can customize certain aspects of this page. You cannot edit or delete individual input fields and buttons on the page but you can delete entire regions containing these elements, add new components, and change the page layout if required

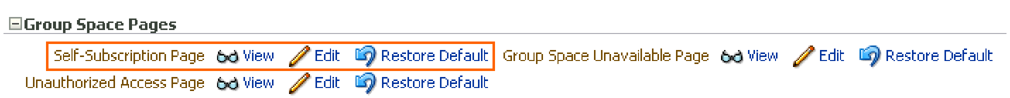
Figure 13–7 Default Self-Subscription Page



To customize the Self-Subscription page:

1. Click the **Settings** tab, then the **General** tab.
2. On the **General** page, under **Group Space Pages**, next to **Self-Subscription Page**, click **View** to display the current version of the page, or click **Edit** to customize the page (Figure 13–8).

Figure 13–8 Editing the Self-Subscription Page



3. Edit the Self-Subscription page in Oracle Composer, then click **Save**.

Note: To edit existing text in the page, click the **View** menu and select **Source**. Click editable regions of the page to modify the existing text. For text that is not directly editable, open its properties dialog (right-click the object in the Source view and select **Properties**), and enter the new text in the **Value** field. To add content to the page, click the **View** menu and select **Design**. In the editable areas of the page, click **Add Content**. For more information about working with Oracle Composer, see Section 6.2, "Introducing Oracle Composer".

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4. To restore the default version of the page, click **Restore Default**.

13.6.3 Customizing the Unauthorized Access Page

The Unauthorized Access page displays when someone tries to open a group space or group space page under the following conditions:

without access permissions. If someone tries to open a group space in which they are not a member:

- The group space does not allow self-subscription (see Section 15.1.1, "Managing Self-Subscription and Membership Changes for a Group Space").
- A group space member attempts to display a page in the group space for which their role does not have access permissions.

If the user tries to open a group space that allows self-subscription (see Section 15.1.1, "Managing Self-Subscription and Membership Changes for a Group Space"), the Request Membership page displays.

Moderators can customize the default content of this page.

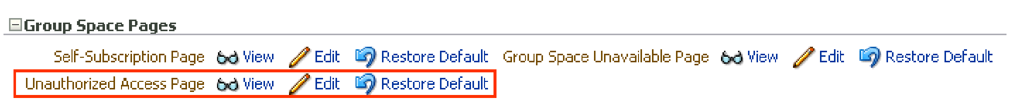
Figure 13–9 shows the Unauthorized Access page supplied out-of-the-box. This is the default page for group spaces based on built-in templates. The default page might be different for group spaces based on other templates.

Figure 13–9 Default Unauthorized Access Page

To customize the Unauthorized Access page:

1. Click the **Settings** tab, then the **General** tab.
2. On the **General** page, under **Group Space Pages**, next to **Unauthorized Access Page**, click **View** to display the current version of the page, or click **Edit** to customize the page (Figure 13–10).

Figure 13–10 Editing the Unauthorized Access Page



3. Edit the Unauthorized Access page in Oracle Composer, then click **Save**.

> **Note:** To edit existing text in the page, click the **View** menu and select **Source**. Click editable regions of the page to modify the existing text. For text that is not directly editable, open its properties dialog (right-click the object in the Source view and select **Properties**), and enter the new text in the **Value** field. To add content to the page, click the **View** menu and select **Design**. In the editable areas of the page, click **Add Content**. For more information about working with Oracle Composer, see Section 6.2, "Introducing Oracle Composer".

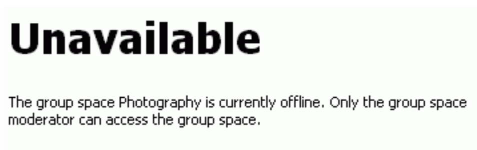
4. To restore the default version of the page, click **Restore Default**.

13.6.4 Customizing the Group Space Unavailable Page

The Group Space Unavailable page displays when a group space member tries to open a group space that is temporarily offline. The group space moderator can customize the default content of this page.

Figure 13–11 shows the Group Space Unavailable page supplied out-of-the-box. This is the default page for group spaces based on built-in templates. The default page might be different for group spaces based on other templates.

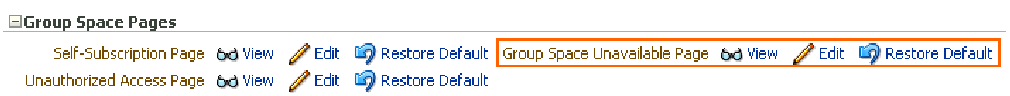
Figure 13–11 Default Group Space Unavailable Page



To customize the Group Space Unavailable page:

1. Click the **Settings** tab, then the **General** tab.
2. On the **General** page, in the **Group Space Pages** section, next to **Group Space Unavailable Page**, click **View** to display the current version of the page, or click **Edit** to customize the page (Figure 13–12).

Figure 13–12 Editing the Group Space Unavailable Page



3. Edit the Group Space Unavailable page in Oracle Composer, then click **Save**.

> **Note:** To edit existing text in the page, click the **View** menu and select **Source**. Click editable regions of the page to modify the existing text. For text that is not directly editable, open its properties dialog (right-click the object in the Source view and select **Properties**), and enter the new text in the **Value** field. To add content to the page, click the **View** menu and select **Design**. In the editable areas of the page, click **Add Content**. For more information about working with Oracle Composer, see Section 6.2, "Introducing Oracle Composer".

4. To restore the default version of the page, click **Restore Default**.

13.7 Setting a Group Space Display Language

A group space display language can be optionally set by the group space moderator to control the language in which the user interface (UI) elements of a particular group space render in WebCenter Spaces. UI elements include button and field labels, application links, screen text, and so on.

WebCenter Spaces provides runtime translations for 27 languages and 100 different locales. For more information, see Section 3.1.1, "What You Should Know About Display Languages in WebCenter Spaces." Your WebCenter Spaces administrator can reduce the number of available languages exposed in WebCenter Spaces by modifying the `supported-languages.xml` file, as described in the white paper, "*Extending WebCenter Spaces (11.1.1.2.0)*" on the Oracle Technology Network: `http://www.oracle.com/technology/products/webcenter/white_papers.html`.

In WebCenter Spaces, the display language can be set at several levels. The order of precedence for WebCenter Spaces display language settings from weakest to strongest is as follows:

- **Browser setting** - your browser documentation will describe how to change the browser's language.
- **Application setting** - see "Choosing the Default Display Language" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter*.
- **User preference setting** - see Section 3.1.3, "Setting a User Preference Display Language."
- **Session setting** - see Section 3.1.2, "Setting a Session Display Language."
- **Group space setting** - see the instructions below.

When a group space moderator sets the group space display language, the group space always displays using that language setting. As indicated in the list above, this setting is given precedence over all other language settings (within the scope of viewing the group space). For example, if the moderator of a group space named WebCenter Central sets the group space language to German, and Monica (a participant of group space WebCenter Central) sets her session language to Dutch, assuming no other language settings are in effect:

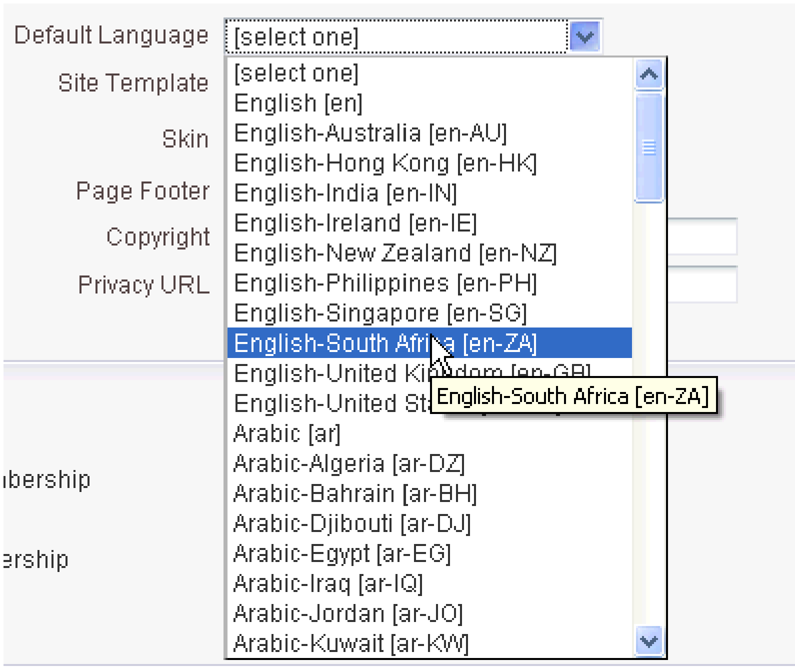
- Monica views the WebCenter Central group space in German, and cannot change this language setting.
- Monica views other parts of WebCenter Spaces, outside the WebCenter Central group space, in Dutch.

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

To set a group space display language:

1. Click the **Settings** tab, then the **General** tab.
2. On the **General** page, under **Displays Settings**, select a language for the group space from the **Default Language** list (Figure 13–13).

Figure 13–13 Setting Group Space Display Language



13.8 Applying a Look and Feel to a Group Space

To apply a unique look and feel to a group space, or to associate a group space with specific branding, the group space moderator can customize the colors, style, icons, logos, and other aspects of the group space pages.

This section contains the following sub-sections:

- Section 13.8.1, "Choosing a Default Page Scheme and Style"
- Section 13.8.2, "Changing the Group Space Display Name"
- Section 13.8.3, "Changing the Group Space Icon"
- Section 13.8.4, "Changing the Group Space Logo"
- Section 13.8.5, "Applying a Group Space Site Template"
- Section 13.8.6, "Applying a Group Space Skin"
- Section 13.8.7, "Customizing Copyright and Privacy Statements"

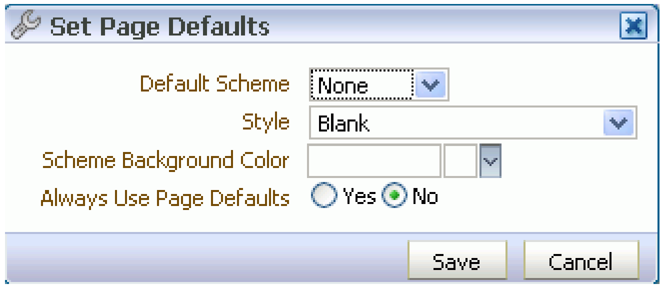
13.8.1 Choosing a Default Page Scheme and Style

As a group space moderator, you can choose the default page scheme and style for new pages that you create for your group space. To edit the page scheme and style of existing pages, see Section 8.4, "Working with Page Layouts, Styles, and Schemes".

To choose a default scheme and style for new pages in a group space:

1. Click the **Settings** tab, then the **Pages** tab.
2. On the **Pages** page, click **Set Page Defaults** to display the Set Page Defaults dialog (Figure 13–14), where you can specify the default scheme and style for group space pages.

Figure 13–14 Set Page Defaults Dialog



For more information about each setting, see Section 7.5, "Setting Page Creation Defaults for Your Personal Pages".

3. Select an option next to **Always Use Page Defaults**:

   Yes—Pages created for this group space must always use the page scheme and style chosen here. Select this option to enforce a common look and feel across the entire group space by skipping the Create Page dialog, and creating pages using the defaults set here.

   No—Group space members can create pages with different schemes and styles, with the default values you specify displayed as initial values in the Create Page dialog.

13.8.2 Changing the Group Space Display Name

Moderators and users with the `Group Space Access-Configure` permission can change the group space display name, which appears on the group space tab, and dialogs and pages where users can select the group space.

Note: Changing the display name does not impact the internal name and URL for the group space. See Section 14.2, "Renaming a Group Space (and Changing the Group Space URL)".

To change the display name of a group space:

1. Click the **Settings** tab, then the **General** tab.
2. On the **General** page, under **Group Space Options**, modify the **Display Name**.

Figure 13–15 Changing the Group Space Display Name

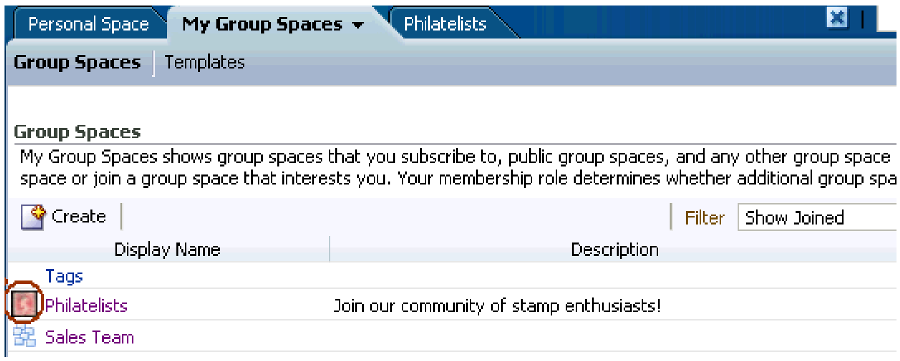
3. Click **Apply** to save.

13.8.3 Changing the Group Space Icon

Group space icons display alongside group space names on the **Group Spaces** page in **My Group Spaces** to help other users with identification and location (Figure 13–16).

The default icon is provided by the template used when you create the group space but you can choose a different icon if desired.

Figure 13–16 Displaying a Group Space Icon

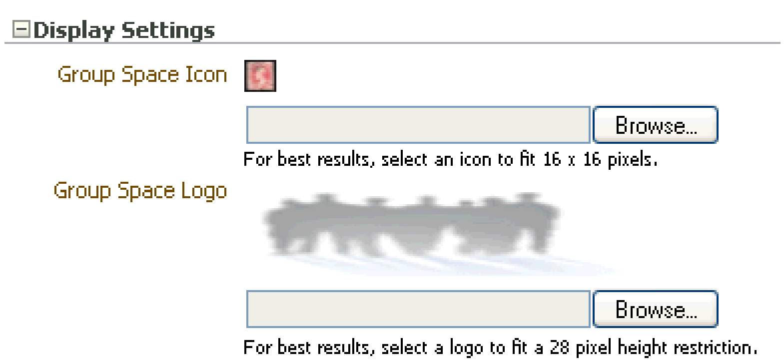


To change the group space icon:

1. Click the **Settings** tab, then the **General** tab.
2. On the **General** page, under **Display Settings**, enter the location and file name of a **Group Space Icon**, or click **Browse** to open the File Upload dialog to select an icon (Figure 13–17). For best results, select an icon of 16 x 16 pixels.

Note: The icon file can be up to 1 MB. Supported file formats are `.gif` or `.GIF`, `.png` or `.PNG`, and `.jpg` or `.JPG`.

Figure 13–17 Changing the Group Space Icon



3. Click **Apply** to save.

   The new icon displays above the input field, and also alongside the group space name on the **Group Spaces** page in **My Group Spaces**.

13.8.4 Changing the Group Space Logo

Group spaces created from a template may display a default logo (Figure 13–18) on the **Home** page. Also, when a group space is displayed in Full Screen Mode, the group space logo displays alongside the group space name at the top of the page.

Moderators can add a logo (or change the default logo) to something more suitable if desired.

Figure 13–18 Displaying a Group Space Logo

To change the group space logo:

1. Click the **Settings** tab, then the **General** tab.
2. On the **General** page, under **Display Settings**, enter the location and file name of a **Group Space Logo**, or click **Browse** to open the File Upload dialog to select a logo (Figure 13–17). For best results, select a logo to fit the 28 pixel height restriction.

   Note: The logo file can be up to 1 MB. Supported file formats are `.gif` or `.GIF`, `.png` or `.PNG`, and `.jpg` or `.JPG`.

   ---

3. Click **Apply** to save.

   The new logo displays above the input field. It also displays at the top of the **Home** page of the group space, and alongside the group space name at the top of the page when the group space is displayed in Full Screen Mode (see Section 13.8.5, "Applying a Group Space Site Template").

13.8.5 Applying a Group Space Site Template

A *site* is a collection of web pages that contain content items and are connected through a navigation hierarchy. In WebCenter Spaces, a site template describes how the pages of the application display on a user's screen. For example, a page can occupy the entire screen, or display within the confines of the application window. WebCenter Spaces provides two built-in site templates that you can select to specify how your group space pages display on the screen. Alternatively, developers can create custom site templates to offer more ways to display pages on the screen, as described in the For more information, see the white paper, "*Extending WebCenter Spaces (11.1.1.2.0)*," on the Oracle Technology Network:

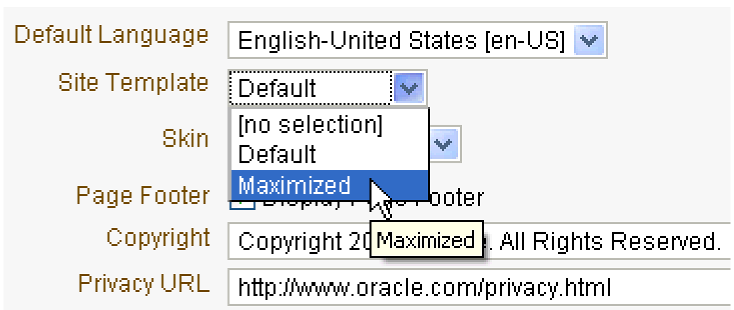
http://www.oracle.com/technology/products/webcenter/white_papers.html.

By default, a group space uses the site template set by the WebCenter Spaces administrator for the entire application (see "Applying Site Templates" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter*). However, if you create a group space based on a group space template that is defined to use a specific skin, that skin is assigned to the new group space. You can optionally select a new skin for the group space, overriding the template setting and the application setting.

To set a group space site template:

1. Click the **Settings** tab, then the **General** tab.
2. On the **General** page, under **Site Template**, select the desired site template in which to display the group space (Figure 13–19):

Figure 13–19 Setting the Group Space Site Template

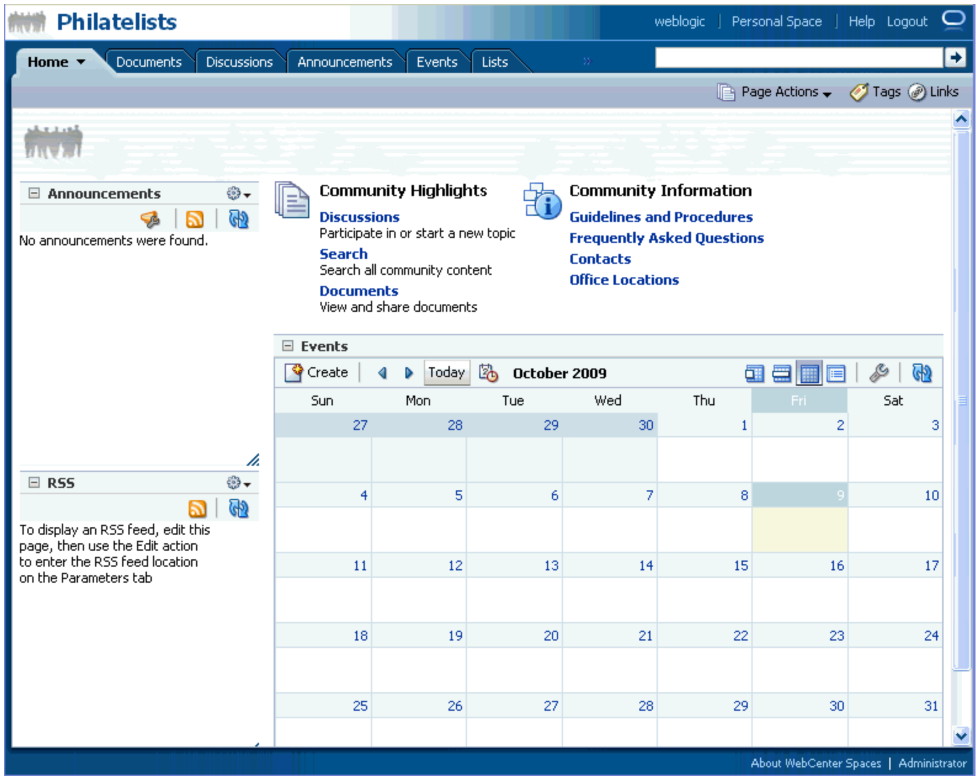


- **<no selection>**. Uses the site template set at the application level by the WebCenter Spaces administrator.
- **Default**. Opens the group space in the normal WebCenter Spaces view; that is, with a global tool bar, sidebar, footers, and so on.
- **Maximized**. Opens the entire group space in full-screen mode to occupy the entire screen; the rest of WebCenter Spaces is hidden, as shown in Figure 13–20. This option enables users to focus entirely on the group space and maximizes the display area.

3. Click **Apply** to save.

When group space members open the group space, it displays using the specified site template. This setting cannot be changed by end users.

Figure 13–20 Group Space in Maximized Site Template



13.8.6 Applying a Group Space Skin

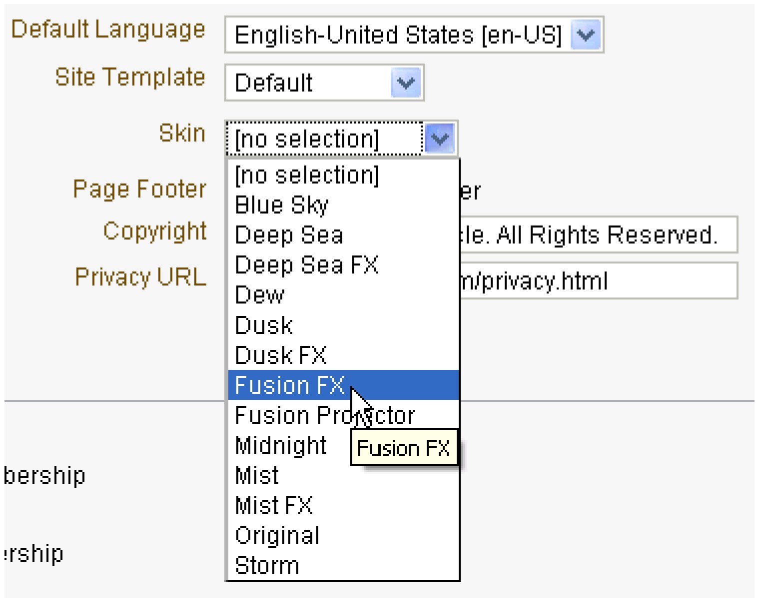
As a group space moderator, you may customize the appearance of the group space for all members by changing its skin. A skin changes the way the user interface appears, but does not change the group space's behavior. A selection of built-in skins is provided with WebCenter Spaces. Alternatively, developers can create custom skins to brand the application according to your corporate image, as described in the white paper, "*Extending WebCenter Spaces (11.1.1.2.0)*" on the Oracle Technology Network: `http://www.oracle.com/technology/products/webcenter/white_papers.html`.

By default, a group space uses the skin set by the WebCenter Spaces administrator for the entire application (see "Applying a Look and Feel Using Skins" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter*). However, if you create a group space based on a group space template that is defined to use a specific site template, that site template is assigned to the new group space. You can optionally select a new site template for the group space, overriding the template setting and the application setting.

To set a group space skin:

1. Click the **Settings** tab, then the **General** tab.
2. On the **General** page, under **Skin**, select the desired skin in which to wrap the group space (Figure 13–21):

Figure 13–21 Setting the Group Space Skin



3. Click **Apply** to save.

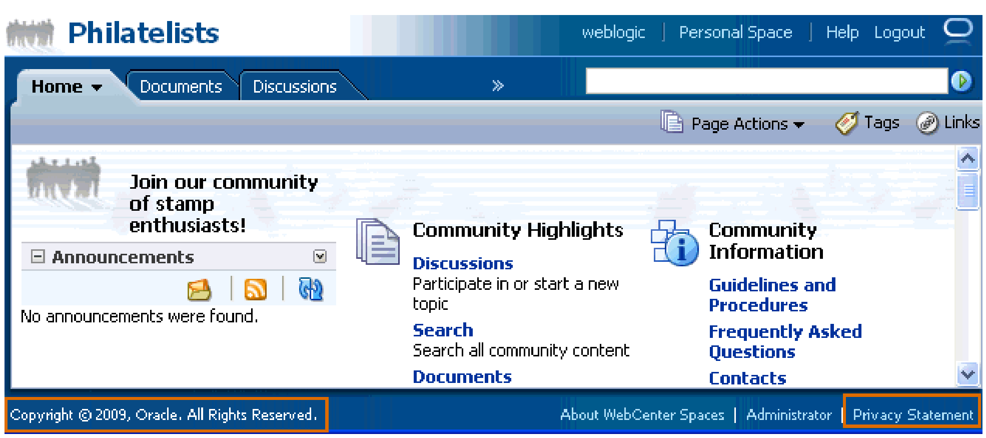
13.8.7 Customizing Copyright and Privacy Statements

Moderators can customize or hide the copyright and privacy statements for a group space. Copyright and privacy details specific to the group space display in Full Screen Mode only. In Normal Mode, when the group space displays as a tab within WebCenter Spaces, copyright and privacy statements applicable to the entire application display. See Section 13.8.5, "Applying a Group Space Site Template".

If displayed, the copyright and privacy URL appear in the page footer of the group space (Figure 13–22):

- Copyright - Displays a copyright statement specific to the group space.
- Privacy URL - Links to a document that contains a privacy policy for the group space.

Figure 13–22 Customizing the Copyright and Privacy URL

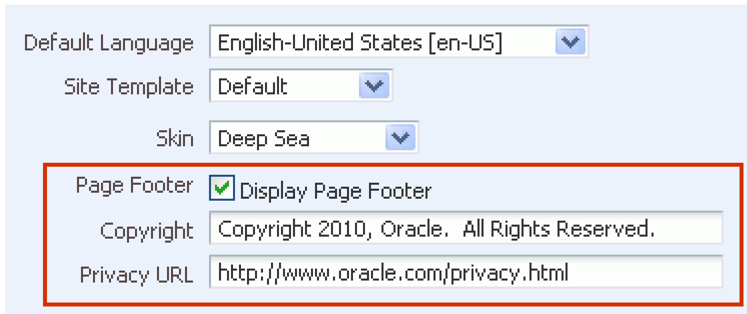


To customize the copyright and privacy URL for a group space:

1. Click the **Settings** tab, then the **General** tab.
2. On the **General** page, under **Displays Settings**, select **Display Page Footer** to display a page footer when the group space is displayed in Full Screen Mode (Figure 13–23).

   Clear the check box to hide the page footer when the group space is displayed in Full Screen Mode.

Figure 13–23 Customizing the Copyright and Privacy URL



3. In the **Copyright** and **Privacy URL** fields, enter appropriate values.
4. Click **Apply** to save.

13.9 Defining Custom Attributes for a Group Space

Each group space comes with a set of built-in attributes such as name, description, date created, icon, and so on. In addition to these built-in attributes, moderators can add custom attributes that are unique to the group space and its characteristics.

Custom attributes let you specify additional group space information (metadata). Custom attributes are propagated throughout the group space. Any group space pages, task flow, or portlet that delivers customized content based on parameter values can accept custom attribute values and display content accordingly using the following Expression Language (EL) syntax to access the custom attribute value:

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

A custom attribute is simply a name value pair (such as `customerId=400`, `orderId=11`, or `userName=Smith`). For example, if you build a group space for customer analysis purposes, it might contain several custom task flows that take the parameter `customerId` as an input: task flows such as Customer Sales History, Customer Satisfaction Rating, Future Sales Prospects, or Customer Contact Information. With a custom attribute defined named `customerId` with an appropriate customer value, all the task flows that can accept a `customerId` can display information specific to that customer.

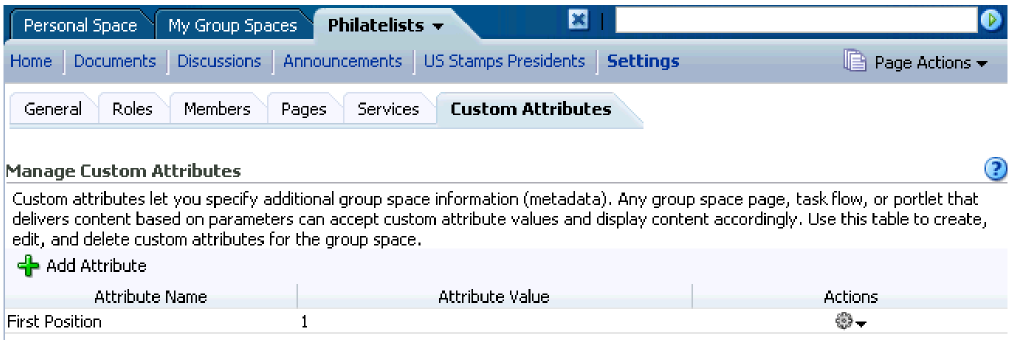
A custom attribute can also be dynamic, using Expression Language (EL) expressions (see Section 10.4.5, "Using Expression Language (EL) Expressions with Component Properties"). For example, a custom attribute could use an EL expression to read a value that is passed in. A URL that displays the group space could pass the attribute value in the URL (for example, `customerid=10`), which would be applied to the custom attribute using the EL expression. For more information, see Section 11.5, "Passing Parameter Values Through the Page URL."

Custom attributes are stored with the group space template. New group spaces based on the template inherit the custom attributes and their values.

To add a custom attribute for a group space:

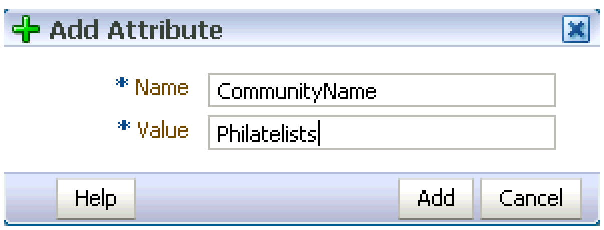
1. Click the **Settings** tab, then the **Custom Attributes** tab.
2. On the **Custom Attributes** page, click **Add Attribute** (Figure 13–24).

Figure 13–24 Defining Custom Attributes for a Group Space



The Add Attribute dialog opens (Figure 13–25).

Figure 13–25 Entering Custom Attribute Name and Value



3. Enter a unique **Name** for the attribute.
4. Optionally, enter a **Value** for the custom attribute. You can type a static value, or specify a dynamic value by entering an Expression Language (EL) expression (see Section 10.4.5, "Using Expression Language (EL) Expressions with Component Properties").
5. Click **Add** to save the custom attribute and display it in the list on the Custom Attributes page.
6. Under **Actions**, click the **Actions** icon and select the desired action:
   – To edit a custom attribute, select **Edit Attribute** to display the Edit Attribute dialog to modify the attribute name or value.
   – To delete a custom attribute, select **Delete Attribute** to display the Delete Attribute dialog to remove the attribute from the group space.

13.10 Creating Your Own Group Space Templates

Out-of-the-box, WebCenter Spaces provides three group space templates—Blank, Community of Interest, and Group Project (see Section 13.2, "What You Should Know About Group Space Templates"). You cannot modify or delete these templates but you can create new templates, based on group spaces that you own.

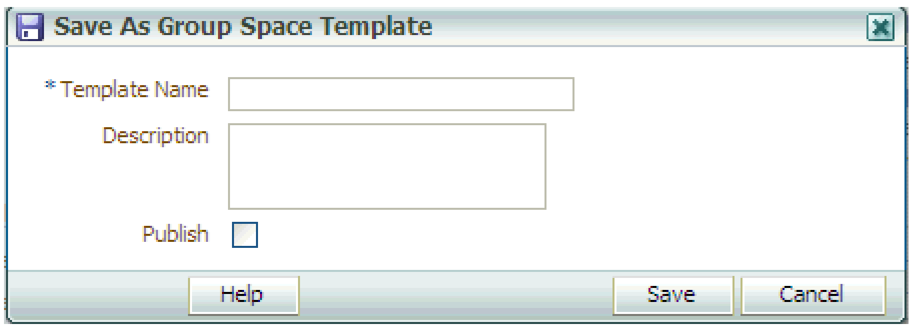
When you save a group space as a template, all the pages, metadata, roles, services, and custom attributes associated with the group space are saved. The group space data, such as documents, discussion threads, and list data is *not* saved with the template. You can publish group space templates for others to use; otherwise, they remain private and hidden from others.

To create a template from a group space:

1. Click the **Settings** tab, then the **General** tab.
2. On the **General** page, click **Save As Group Space Template**.

   The Save As Group Space Template dialog opens (Figure 13–26).

Figure 13–26 Creating a Group Space Template



3. Enter a suitable **Template Name** and **Description**. Choose a name that describes the group space template and other WebCenter users will recognize.

   Group space template names can contain alphanumeric characters, underscores, and spaces. The following reserved keywords are not allowed as the full group space template name either in upper or lowercase, or a combination of both—`webcenter`, `pages`, `page`, `spaces`, `space`, `group`, `groups`, `group space`, `group spaces`, `webcenter space`, `webcenter spaces`, `webcenter administration`, `my group spaces`, `admin`, `last`. These reserved words are allowable as part of a longer name (for example, `Sales Group`).
4. To publish the template to make it available to all WebCenter Spaces users, select **Publish**. The new template remains private unless you publish it. You can modify this setting on the **Templates** page in **My Group Spaces**.
5. Click **Save**.

Use **My Group Spaces** to view and manage all your group space templates, as discussed in Section 14.8, "Managing Group Space Templates".

When you create a new group space based on a template that is defined to use a specific language, site template, or skin:

- The language is not inherited by the new group space. To set a group space language, see Section 13.7, "Setting a Group Space Display Language."
- The site template and skin are inherited by the new group space. To set a new group space site template or skin, see Section 13.8.5, "Applying a Group Space Site Template" and Section 13.8.6, "Applying a Group Space Skin."

13.11 Adding Wikis or Blogs

The functionality provided through Oracle Wiki Server is available to you in WebCenter Spaces to include wikis and blogs on your group space pages.

Wiki pages are populated and monitored by a collaborative group of users with common interests and goals. Users with sufficient permission on the wiki can edit a page to add to, revise, or remove information. Everyone works together to create resource pages that are relevant, useful, and up-to-date.

Blogs, however, are more personal records of an individual user's experience and opinions. Blog pages provide a useful means of capturing and publishing the knowledge and opinions of a subject matter expert.

For information about exposing and developing wikis and blogs on group space pages, see Chapter 30, "Working with Wikis and Blogs".

13.12 Making a Group Space Available

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

- Section 13.12.1, "Making a Group Space Known (Discoverable)"
- Section 13.12.2, "Granting WebCenter Spaces Users Access to a Group Space"
- Section 13.12.3, "Granting Public Access to a Group Space"

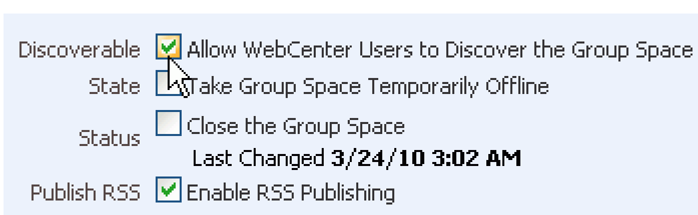
13.12.1 Making a Group Space Known (Discoverable)

Allowing a group space to be discovered does not make its content accessible. Other WebCenter Spaces users will know that your group space exists as it appears on their **Group Spaces** page. Users interested in your group space can request membership through self-subscription (if enabled) or by mail.

To make a group space discoverable by other WebCenter Spaces users:

1. Click the **Settings** tab, then the **General** tab.
2. On the **General** page, under **Group Space Options**, select **Allow WebCenter Users To Discover the Group Space** (Figure 13–27).

Figure 13–27 Making a Group Space Discoverable By WebCenter Spaces Users



3. Click **Apply** to save.
4. (Optional) To allow users to discover and subscribe themselves to your group space, you may want to enable self-subscription too (you can still retain control by requiring approval for any subscription request). See Section 15.1.1, "Managing Self-Subscription and Membership Changes for a Group Space".

5. Now that you have made the group space discoverable, the next step is to give the appropriate roles the permissions required to access the group space (see Section 13.12.2, "Granting WebCenter Spaces Users Access to a Group Space" and Section 13.12.3, "Granting Public Access to a Group Space").

13.12.2 Granting WebCenter Spaces Users Access to a Group Space

A group space moderator controls what a WebCenter Spaces user can see or do in the group space.

This section contains the following subsections:

- Section 13.12.2.1, "Granting Access to a Group Space"
- Section 13.12.2.2, "Granting Access to Individual Group Space Pages"

Note: To use the Microsoft Office shared document management functionality (while editing a Microsoft Word, Excel, or PowerPoint file in a group space) to add members to a group space, see Section 18.2.3.11, "Adding Members to a Group Space."

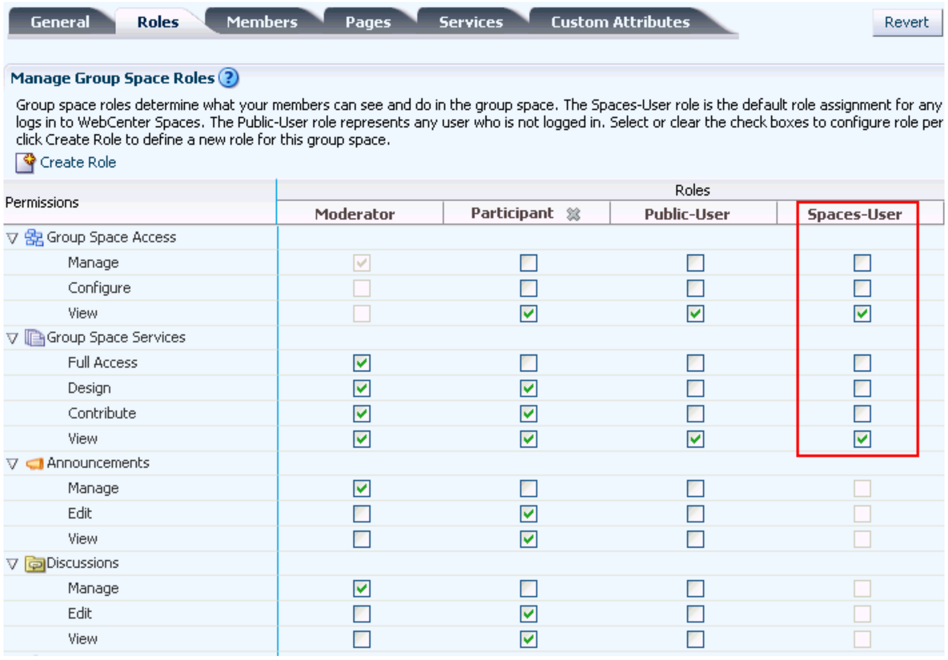
13.12.2.1 Granting Access to a Group Space

Group space members with the `Moderator`, `Participant`, and `Viewer` roles are granted specific permissions in the group space by default (see Section 15.2.1.2, "Understanding Group Space Permissions"). The group space moderator can modify these permissions as required (see Section 15.2.3, "Viewing and Editing Permissions of a Group Space Role").

To grant other registered WebCenter Spaces users (who have the default `Spaces-User` role) access to a group space:

1. Click the **Settings** tab, then the **Roles** tab.
2. On the **Roles** page, under the **Spaces-User** role, select the check box for the desired WebCenter Spaces user permissions for the group space (View, Configure, or Manage). For example, If you want all registered users to have read-only access to your group space, select the **Group Space Access View** permission for the **Spaces-User** role (Figure 13–28).

Figure 13–28 Granting WebCenter Spaces User Access to Group Space



3. The group space is not fully accessible until you give the `Spaces-User` role permissions to access the pages of the group space:

   - To grant access to the entire group space: On the **Roles** page, under the **Spaces-User** role, select the desired check boxes for **Group Space Services** permissions, which apply to *all* pages, events, links, lists, and notes in the group space. See Section 15.2.1.2, "Understanding Group Space Permissions" for detailed information.

   - To grant access to a limited number of individual pages of the group space, see Section 13.12.2.2, "Granting Access to Individual Group Space Pages".

4. Click **Apply** to save.

13.12.2.2 Granting Access to Individual Group Space Pages

You may want to make specific pages in your group space available, but not the entire group space.

Group space members with the `Moderator`, `Participant`, and Viewer roles are granted certain permissions to all pages in the group space by default (see Section 15.2.1.2, "Understanding Group Space Permissions"). Follow the steps in this section to limit access to only certain group space pages.

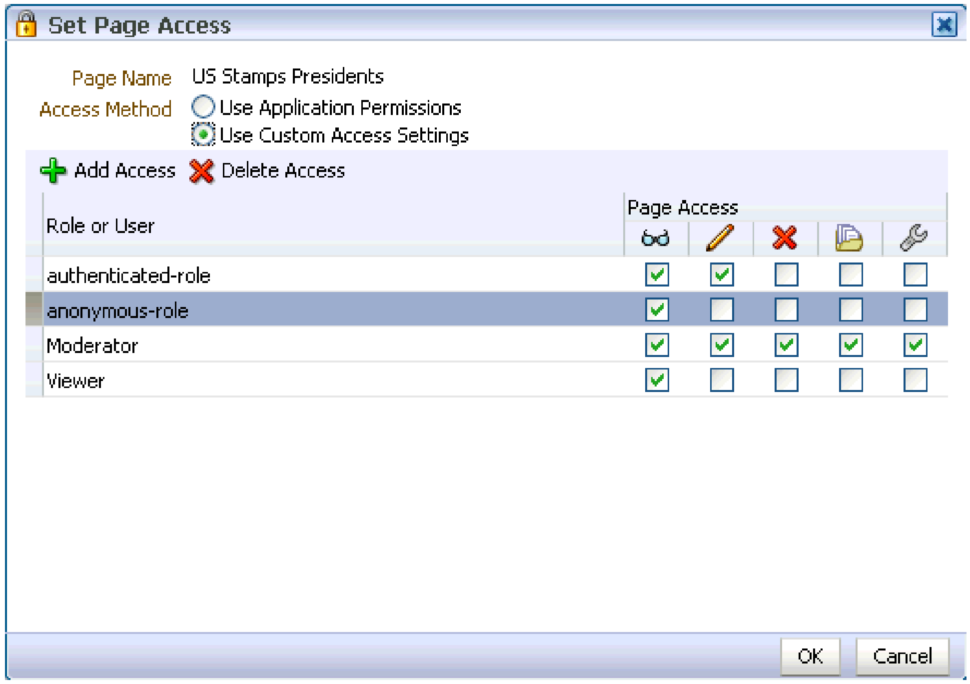
To grant group space members and other registered WebCenter Spaces users (who have the default `Spaces-User` role) access to individual group space pages:

1. Click the **Settings** tab, then the **Roles** tab.
2. On the **Roles** page, under the role for which you want to specify page access permissions, clear any check boxes for **Group Space Services** permissions, which apply to *all* pages, events, links, lists, and notes in the group space. See Section 15.2.1.2, "Understanding Group Space Permissions" for detailed information.
3. Click the **Pages** tab.

4. On the **Pages** page, select the page that you want to make available, then click the **Actions** icon and select **Set Page Access**.

   The Set Page Access dialog opens (Figure 13–29).

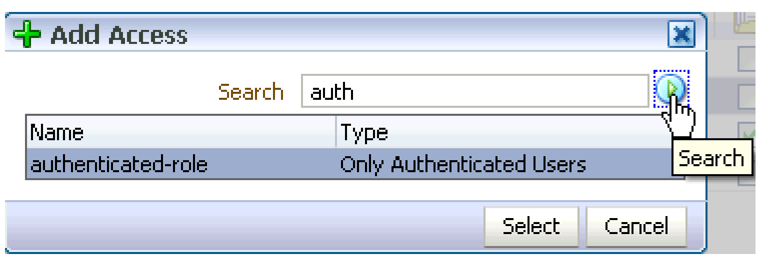
Figure 13–29 Set Page Access Dialog



5. Select **Use Custom Access Settings**.

6. If the role for which you want to set page access permissions is not listed, click **Add Access**. In the Add Access dialog (Figure 13–30), search for the role name, and select it for the group space.

Figure 13–30 Add Access Dialog



Note: In the Add Access dialog, you can select the default roles `Moderator`, `Participant`, and `Viewer`, and any custom roles that have been created for the group space. Additionally, you can select:

- `authenticated-role` to set permissions for the `Spaces-User` role.
- `anonymous-role` to set permissions for the `Public-User` role.

For more information about group space roles, see Section 15.2, "Managing Group Space Roles and Permissions"

Click **OK**.

7. Next to the role listed in the Set Page Access dialog, set the **Page Access** permissions as desired.

13.12.3 Granting Public Access to a Group Space

A group space moderator can make the group space available to anyone with access to the WebCenter Spaces instance that contains the group space. Registering for a WebCenter Spaces account is not required. Public access may be given to the entire group space, or restricted to specific group space pages. The public information provided allows the group space to be shared with non-members and people outside of the WebCenter Spaces community.

This section contains the following subsections:

- Section 13.12.3.1, "Making a Group Space Public"
- Section 13.12.3.2, "Making Individual Group Space Pages Public"

13.12.3.1 Making a Group Space Public

Users can access public group spaces in two ways:

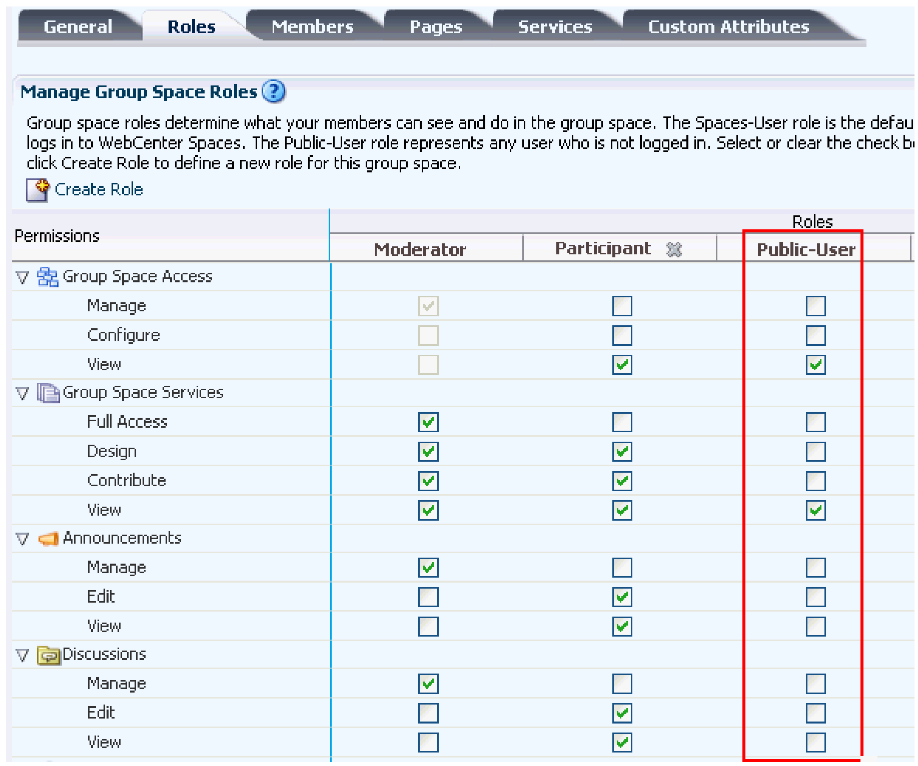
- Directly, using the group space's URL as shown on the **General** page.
- From the WebCenter Spaces Welcome page, if your installation is configured to display this page (Figure 13–31).

Figure 13–31 Public Group Spaces link on Welcome Page

To make a group space public, you must make both the group space and its pages public:

1. Click the **Settings** tab, then the **Roles** tab.
2. On the **Roles** page, under the **Public-User** role, select the check box for the desired public permissions for the group space. For example, if you want all public users to have read-only access to the group space, select the group space **View** permission for the **Public-User** role (Figure 13–32). Grant higher access privileges with care as public users are unauthenticated.

Figure 13–32 Granting Public User Access to Group Space



3. The group space is not publicly accessible until you give the `Public-User` role permissions to access the pages of the group space:
   - To make the entire group space public: On the **Roles** page, under the **Public-User** role, select the desired check boxes for **Group Space Services** permissions, which apply to *all* pages, events, links, lists, and notes in the group space. See Section 15.2.1.2, "Understanding Group Space Permissions" for detailed information.
   - To make a limited number of pages of the group space public, see Section 13.12.3.2, "Making Individual Group Space Pages Public".
4. Click **Apply** to save.

13.12.3.2 Making Individual Group Space Pages Public

You may want to make specific pages in your group space publicly available, but not the entire group space.

To make an individual group space page public:

1. Click the **Settings** tab, then the **Pages** tab.
2. On the **Pages** page, select the page that you want to make public, then click the **Actions** icon and select **Make Public**.

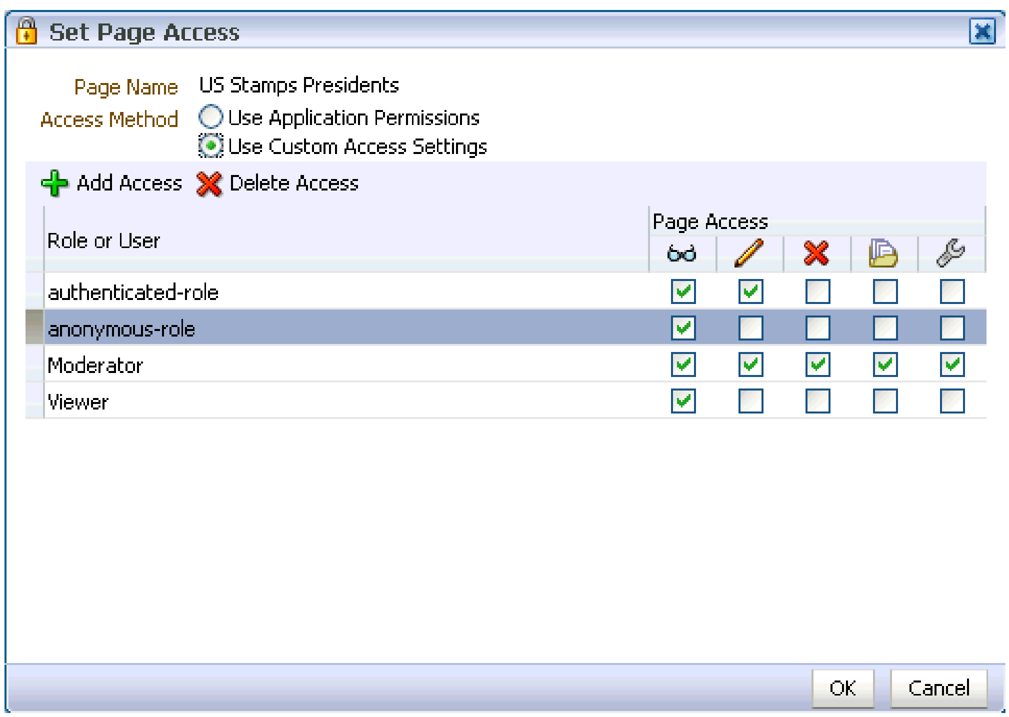
Note: The parent group space must be public for the page to be visible to public users. In other words, **Make Public** is active only if the `Public-User` role has been given permission to access the group space on the **Roles** tab (see Section 13.12.3.1, "Making a Group Space Public").

Make Public gives public users (anyone with access to the WebCenter Spaces instance that contains the group space) read-only access to the page. This automatically assigns the `Public-User` role View Page privileges (shown as **anonymous-role** in the Set Page Access dialog).

3. To give the `Public-User` role higher access privileges (Edit Page, Delete Page, Perform All Page Actions, or Personalize Page), click the **Actions** icon and select **Set Page Access**.

   The Set Page Access dialog opens (Figure 13–33).

Figure 13–33 Set Page Access Dialog



4. Select **Use Custom Access Settings**.
5. If **anonymous-role** is not listed, click **Add Access**. In the Add Access dialog, search for and select `anonymous-role`. Click **OK**.
6. For the **anonymous-role** role listed in the Set Page Access dialog, set the **Page Access** permissions as desired. The permissions you select for **anonymous-role** are given to the `Public-User` role.

Note: To revert a page to its default permission settings, select **Use Application Permissions** in the Set Page Access dialog.

To see what the public view of your group space looks like, copy the **Group Space URL** value on the **General** page, log out of WebCenter Spaces, and paste the URL into your browser. Because you are logged out of WebCenter Spaces, only pages designated as public display.

14

Managing Group Spaces

This chapter provides information about configuring and managing an environment dedicated to a group effort or an area of interest. It describes how to access group space administration pages, manage services, and perform administrative tasks. It contains the following sections:

- Section 14.1, "Accessing Group Space Administration Pages"
- Section 14.2, "Renaming a Group Space (and Changing the Group Space URL)"
- Section 14.3, "Managing Group Space Services"
- Section 14.4, "Taking a Group Space Offline"
- Section 14.5, "Bringing a Group Space Back Online"
- Section 14.6, "Closing a Group Space"
- Section 14.7, "Deleting a Group Space"
- Section 14.8, "Managing Group Space Templates"
- Section 14.9, "Working with the Group Spaces Task Flow"

Audience

This chapter is intended for group space moderators; that is, group space members assigned the `Moderator` role or a custom role that includes the default moderator permissions.

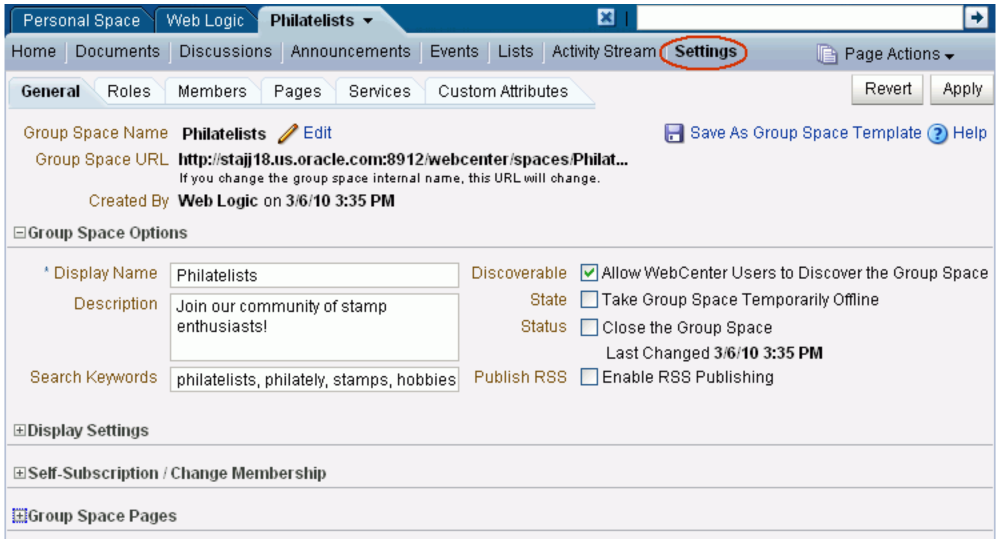
The WebCenter Spaces administrator has the authority to expose or hide some group space features and services. Contact your WebCenter Spaces administrator if some tasks discussed in this chapter are not available to you.

Note: For information about the default group space roles, see Section 15.2.1.1, "Understanding the Default Group Space Roles".

14.1 Accessing Group Space Administration Pages

All group space administration takes place on the pages of the **Settings** tab (Figure 14–1). Group space moderators and anyone granted the `Manage` or `Configure` permission on the group space can see the **Settings** tab and its pages—**General**, **Roles**, **Members**, **Pages**, **Services**, **Custom Attributes**.

Figure 14–1 Group Space Settings Tab and Pages

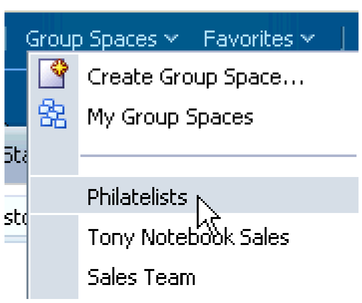


To access the pages of the group space **Settings** tab:

1. Log in, and from **Group Spaces** menu (Figure 14–2), select the required group space.

   See also Section 12.2, "Viewing Available Group Spaces".

Figure 14–2 Selecting a Group Space on Group Spaces Menu



   The group space opens at the same level as your personal space.

2. Click the **Settings** tab.

   If you do not see this tab, you do not have `Manage` or `Configure` permission for this group space. See Section 12.5, "Requesting a Group Space Member Role Change".

14.2 Renaming a Group Space (and Changing the Group Space URL)

Moderators and users with the `Group Spaces-Manage` permission can change the group space internal name.

The group space internal name appears in the pretty URL that other people use to navigate to the group space. The format of the pretty URL is as follows:

```
http://<host>:<port>/webcenter/spaces/<internal_gs_name>
```

For example, `http://mycompany:8888/webcenter/spaces/release_meetings`.

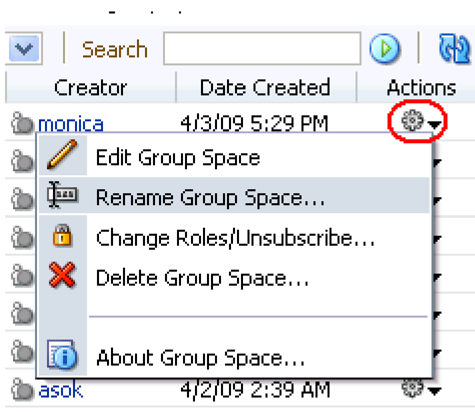
While it is possible to change the internal group space name, it is important to note that any existing bookmarks to the group space will no longer work.

In most cases you need only change the display name; that is, the name displayed on the main group space tab and on dialogs and pages where users can select the group space. This can be done either as described in Section 13.8.2, "Changing the Group Space Display Name", or as in Step 6 below.

To rename a group space:

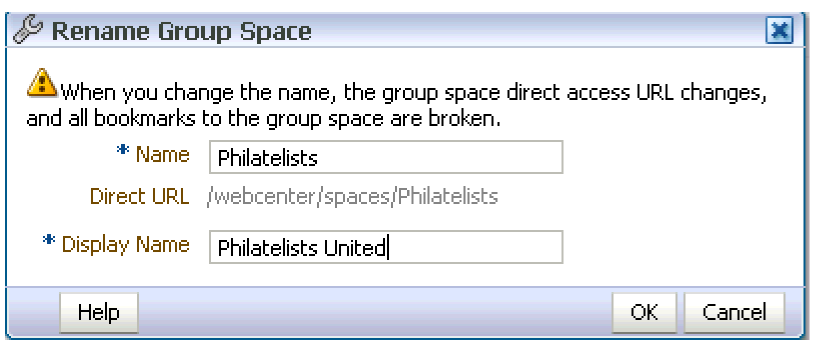
1. From the **Group Spaces** menu at the top of the application, select **My Group Spaces**.
2. Click the **Group Spaces** tab.
3. For the group space you want to rename in the list of group spaces, click the Actions icon, and select **Rename Group Space**. (Figure 14–3).

Figure 14–3 Changing the Group Space Name and URL



The Rename Group Space dialog opens (Figure 14–4).

Figure 14–4 Specifying a New Group Space Name



4. To change the internal name of the group space (and change the group space URL) enter a new **Name**.

   As you change the name, changes to the group space URL are shown in the **Direct URL**.

   Group space names can contain alphanumeric characters, underscores, and spaces. The maximum allowable length is 200 characters. The following reserved keywords are not allowed either in upper or lowercase, or a combination of both—`webcenter`, `pages`, `page`, `spaces`, `space`, `group`, `groups`, `group space`, `group spaces`, `webcenter space`, `webcenter spaces`, `webcenter administration`, `my group spaces`, `admin`, `last`. These reserved words are allowable as part of a longer name (for example, `Sales Group`).

Note: WebCenter Spaces converts spaces in a group space name to underscores in the internal name. Thus, if you have created a group space named `My Group`, then try to rename another group space to `My_Group`, WebCenter Spaces returns an error stating that a group space with that name exists.

---

5. To change the display name of the group space, enter a new **Display Name**, which appears on the main group space tab and on dialogs and pages where users can select the group space.
6. Click **OK**.

14.3 Managing Group Space Services

Most service-related configuration is the responsibility of the WebCenter Spaces administrator or the Fusion Middleware administrator. The administrator configures and maintains service connections, which make the services available in WebCenter Spaces. For more information, see "Managing Services" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter*. Also see Section 1.2, "Introducing WebCenter Services".

The group space moderator can check the **Services** page to see which services are available and can enable or disable services as required. If a service is not shown on the **Services** page, then the WebCenter Spaces administrator has not configured that service connection.

The group space moderator can use the **Roles** page to configure role permissions for each service that is enabled in the group space. If a service is not shown on the **Roles** page, then the service is disabled in the group space. For more information, see Section 15.2.3, "Viewing and Editing Permissions of a Group Space Role".

Service-related configuration activities that moderators can perform for their group space are:

- Enabling and Disabling Services Available to a Group Space
- Configuring a Custom Group Space Mail Distribution List
- Specifying Where Group Space Discussions Are Stored
- Publishing Group Space Mail in a Discussion Forum
- Enabling or Disabling RSS News Feeds for a Group Space

14.3.1 Enabling and Disabling Services Available to a Group Space

Most services operating within a group space are optional. Optional services include Announcements, Discussions, Documents, Group Space Events, Instant Messaging and Presence, and Lists.

When you disable a service, task flows associated with the service are no longer available. For example, if you disable the Discussions service:

- The Discussions page is removed.
- Discussions task flows included in custom group space pages are replaced with a message "Service was not provisioned for this group space".
- Discussions task flows are not offered in the resource catalog for group space pages.

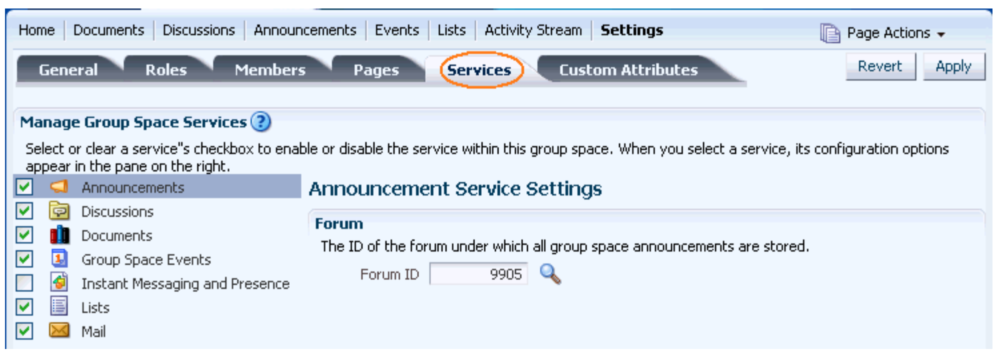
Additionally, permissions granted for disabled services are removed, and any existing data associated with the Discussions, Announcements, Documents, Group Space Events, and Lists services is deleted from the group space when you disable these services.

Group space members do not automatically gain access to service-related task flows when you enable them here. You must also grant appropriate usage permissions for the service on the **Roles** page, as described in Section 15.2.3, "Viewing and Editing Permissions of a Group Space Role".

To enable or disable a service in your group space:

1. Click the **Settings** tab, then the **Services** tab (Figure 14–5).

Figure 14–5 Enabling and Disabling Group Space Services



2. On the **Services** page, select or clear check boxes to enable or disable services, respectively.

Note: If you disable the Mail service, WebCenter deletes the default distribution list that was automatically created for the group space. Attempts to send mail to all members of the group space opens the mail window with the **To** field blank instead of pre-populated with the mail distribution list.

If you previously specified a custom distribution list (see Section 14.3.2, "Configuring a Custom Group Space Mail Distribution List"), then disable the Mail service, the custom distribution list is not deleted, but the relationship between the distribution list and the group space is deleted.

Refer to the online help for the **Services** page for more information about each of the services.

3. Click **Apply** to save.

4. To allow group space members to access the enabled services, you must grant appropriate permissions to the services for each member role on the **Roles** page. See Section 15.2.3, "Viewing and Editing Permissions of a Group Space Role".

14.3.2 Configuring a Custom Group Space Mail Distribution List

Mail distribution lists provide an efficient mechanism for group space communication. WebCenter Spaces creates a default distribution list for every group space if the Mail Server is Microsoft Exchange and active directory connection details (LDAP) are provided in the mail server connection settings. For more information, see "Setting Up Connections for the Mail Service" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter*.

A default distribution list is named as follows: `group_space_name@mail_domain`. For example, the default distribution list for a group space named `Finance Project` is `FinanceProject@mail_domain`, where `mail_domain` is derived from the LDAP Domain setting in the Edit Mail Server Connection screen (accessed through Oracle Enterprise Manager). As members leave or join the group space, WebCenter Spaces updates the default distribution list.

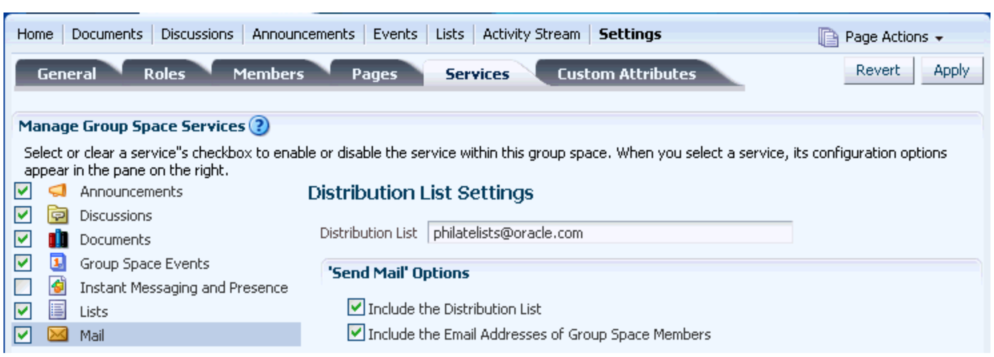
If you disable the Mail service, WebCenter Spaces deletes the default distribution list that was automatically created for the group space. Attempts to send mail to all members of the group space (for example, on the group space **Home** page, click **Email Members**) opens the Mail Compose dialog with the **To** field blank instead of prepopulated with the mail distribution list.

If you create a new custom distribution list for the group space, subscribers to the new custom distribution list are not managed by WebCenter Spaces. As members leave or join the group space, they are not be automatically removed from or added to the custom distribution list. If you create a custom distribution list, then disable the Mail service, the custom distribution list is not deleted, but the relationship between the distribution list and the group space is deleted

To configure a custom group space mailing list:

1. Click the **Settings** tab, then the **Services** tab.
2. On the **Services** page, select **Mail** (Figure 14–6).

Figure 14–6 Configuring the Group Space Mail Distribution List



3. To change the current group space mail distribution list, type a new **Distribution List**. Allowable characters are alphanumeric, dash (-), and underscore (_). Any other character is converted to a dash (-), and spaces are removed.

   If the **Distribution List** field is left blank, attempts to send mail to all members of the group space opens the mail window with the **To** field blank.

4. Under **'Send Mail' Options**, select one, both, or neither of the checkboxes:
   - Select **Include the Distribution List** to populate the **To** field with the name of the group space distribution list.
   - Select **Include the Email Addresses of Group Space Members** to prepopulate the **To** field with the individual email address of the group space members.
5. Click **Apply**.

14.3.3 Specifying Where Group Space Discussions Are Stored

By default, WebCenter Spaces stores all discussion forums and categories under the application root category on the discussions server. Group spaces that are assigned their own category host multiple forums. Group spaces that are not assigned a category can host a single discussion forum.

The group space template determines whether a category or single forum is allocated on the discussions server for a particular group space, as follows:

- **Blank** template. By default, a single forum is created under the application root category for each new group space based on the Blank template. If you consider a category that supports multiple forums to be more suitable for the group space, you can set the Discussions server connection property `group.mapping` to `category` (see "Registering Discussions Servers Using Fusion Middleware Control" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter*).
- **Community of Interest** template. A category and a default forum are created under the application root category for each new group space based on the Community of Interest template. Additional forums are allowed.

  > **Note:** If the Discussions or Announcements services are provisioned for a group space *after* creating the group space based on a Community of Interest template, a single forum is created for the group space. To ensure that a category is created to support multiple forums, first provision the Discussions or Announcements services, then create the group space based on the Community of Interest template.

- **Group Project** template. A single forum is created under the application root category for each new group space based on the Group Project template.

For more information about group space templates, see Section 13.2, "What You Should Know About Group Space Templates".

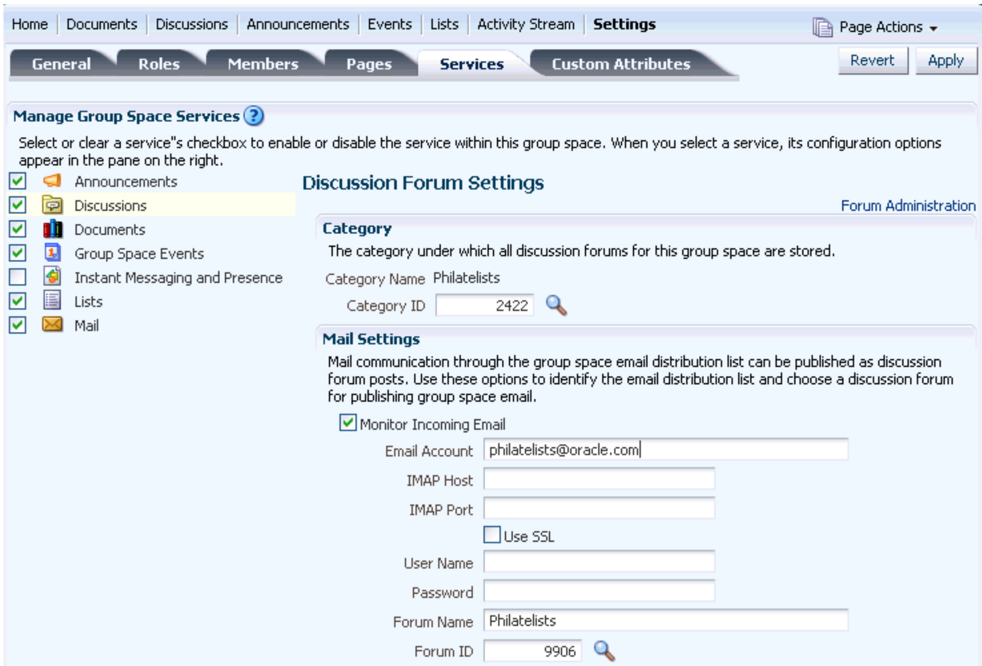
For more information about the discussions server, see "Setting Up Discussions Server Connections" and "Setting Defaults for Discussion Forums" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter*.

Typically, the WebCenter Spaces administrator sets up group space discussion forums. If required, moderators can change the default storage location for their group space discussion forums.

To change the storage location for group space discussions:

1. Click the **Settings** tab, then the **Services** tab.
2. On the **Services** page, select **Discussions** (Figure 14–7).

Figure 14–7 Specifying Where Discussions are Stored



3. (Optional) To launch the Jive Forums Administration Console, the Web-based tool for configuring and managing discussion forums, click **Forum Administration**.
4. To store group space discussions in a different category and discussion forum than those specified by **Category Name** and **Forum Name**, click the Find icons (Figure 14–7) to change the storage location.
5. Click **Apply** on to save the settings.

14.3.4 Publishing Group Space Mail in a Discussion Forum

Communication through the group space mail distribution list can be published as discussion forum posts. When a mail message is new, a new topic is created for it. When a mail message is a reply to an existing mail message, a topic reply is created for it.

Note: WebCenter supports Microsoft Exchange server or any mail server that supports IMAP4 and SMTP. To enable WebCenter users to access mail within a WebCenter application and perform basic operations such as read, reply, and forward, you must first register the appropriate mail server with the WebCenter application. The Mail service is not configured out-of-the-box. Refer to "Setting Up Mail Server Connections" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter*.

To publish group space mail in a discussion forum:

1. Click the **Settings** tab, then the **Services** tab.
2. On the **Services** page, select **Discussions** (Figure 14–7).
3. To publish group space mail on a discussion forum of your choice, select **Monitor Incoming Email**.

To disable this feature so that mail is not published for any group space, clear this check box.

4. Enter the group space **Email Account**.

   This is the distribution list used to mail group space members. For details, see Section 14.3.2, "Configuring a Custom Group Space Mail Distribution List".

5. In the **IMAP Host** field, enter the name of the computer where the IMAP (Internet Message Access Protocol) service is running; in **IMAP Port**, enter the port on which the IMAP service listens.

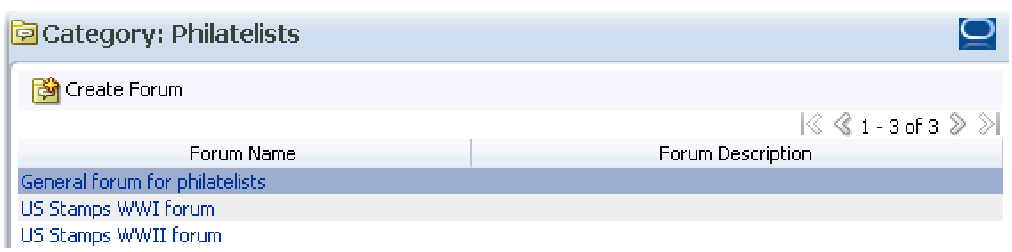
6. Select Use SSL if a secured connection (SSL) is required for incoming mail over IMAP.

7. Enter the User Name and Password of a group space member with sufficient privileges to modify these settings (`Manage` privilege).

8. To publish group space mail on a different discussion forum than the forum specified by **Forum Name**, edit the value in **Forum Name** or **Forum ID**.

   A list of available forums in the group space displays (Figure 14–8).

Figure 14–8 Selecting a Forum for Group Space Mail



9. Single-click a forum in the list to select it.

   Alternatively, create a forum from scratch. Click **Create Forum**, then enter a suitable name and description.

   > **Note:** If you specify a mail distribution list that has been defined as the distribution list for a different group space, then the mail sent to that distribution list are by default archived in the discussion forum specified in the Mail Settings for that group space. Mail sent to a group space distribution list can only be archived one time in one forum, on a first come first served basis.

10. Click **Apply** to save the settings.

   > **Note:** If no forum is specified for mail archiving, or the specified forum is deleted, mail sent to the distribution list is not archived anywhere.

14.3.5 Enabling or Disabling RSS News Feeds for a Group Space

Group space members can find out what is happening in a group space through RSS news feeds. Within the context of a group space, members can:

- Monitor recent activities.

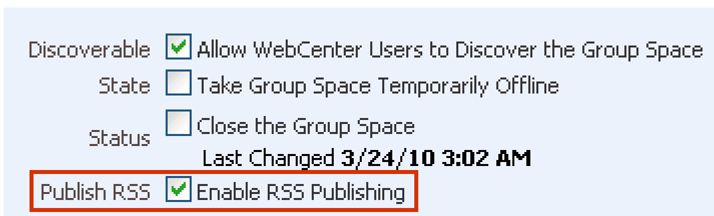
- Track contributions to discussion forums.
- View announcements.
- Watch for revisions to lists.

For more information about publishing RSS new feeds, see Chapter 26, "Working with the RSS Service".

To enable or disable RSS news feeds for a group space:

1. Click the **Settings** tab, then the **General** tab.
2. On the **General** page, under **Group Space Options**, set **Publish RSS** as follows:
   - To allow members access to group space information through RSS feeds, select **Enable RSS Publishing** (Figure 14–9).
   - To disable RSS feeds for this group space, clear **Enable RSS Publishing**.

Figure 14–9 Enabling and Disabling Group Space RSS Feeds



3. Click **Apply** to save.

14.4 Taking a Group Space Offline

Moderators can take a group space temporarily offline for maintenance. For example, if a moderator notices inappropriate content, the group space can be taken offline, and after making required updates, the group space moderator can bring it back online. Only the WebCenter Spaces administrator or group space members with `Group Spaces-Manage` permission can access a group space that is offline. Other members see the group space Unavailable page (Figure 14–10).

Figure 14–10 The Group Space Unavailable Page

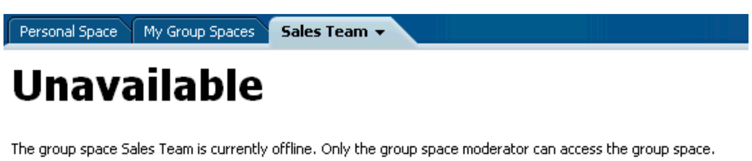


Figure 14–10 shows the default message on the group space Unavailable page. To learn how to customize this page, see Section 13.6.4, "Customizing the Group Space Unavailable Page".

To take a group space offline:

1. Click the **Settings** tab, then the **General** tab.
2. On the **General** page, under **Group Space Options**, select **Take Group Space Temporarily Offline** (Figure 14–11).

Figure 14–11 Taking a Group Space Offline

3. Click **Apply** to save.

14.5 Bringing a Group Space Back Online

When a group space is offline, only the group space moderator or the WebCenter Spaces administrator can bring the group space back online again.

To bring a group space back online:

1. Click the **Settings** tab, then the **General** tab.
2. On the **General** page, under **Group Space Options**, clear the **Take Group Space Temporarily Offline** check box (Figure 14–12).

Figure 14–12 Bringing a Group Space Back Online

3. Click **Apply** to save.

14.6 Closing a Group Space

Group space moderators can close a group space at the end of its lifecycle. When a group space is closed, the group space name is removed from the **Group Spaces** menu to avoid clutter, but it remains listed on the **My Group Spaces** page. All group space content remains accessible and searchable to those who want to reference it and the group space members can continue working in the group space as necessary.

To close a group space:

1. Click the **Settings** tab, then the **General** tab.
2. On the **General** page, under **Group Space Options**, select the **Close the Group Space** check box (Figure 14–13).

Figure 14–13 Closing a Group Space

To reactivate the group space, clear the **Close the Group Space** check box.

3. Click **Apply** to save.

14.7 Deleting a Group Space

When a group space has been closed or inactive for some time, the group space moderator may want to remove it from WebCenter Spaces. Deleting a group space is permanent; it cannot be restored after it is deleted.

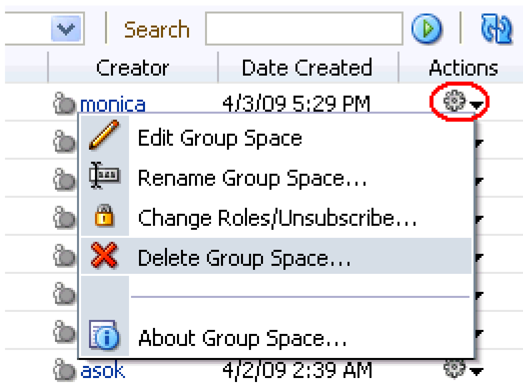
Deleting a group space means that:

- All pages associated within the group space are deleted.
- All group space data managed by WebCenter Spaces (links, lists, notes, tags, and group space events) is deleted.
- All group space roles and membership is deleted.
- Content managed by discussions and announcements is deleted when it is stored in the default forum or category created by WebCenter Spaces. However, content managed by nondefault forums or categories is not deleted (see Section 14.3.3, "Specifying Where Group Space Discussions Are Stored").
- The group space mail distribution list that is automatically created byWebCenter Spaces is deleted. However, distribution lists that are customized by the group space moderator are not deleted (see Section 14.3.2, "Configuring a Custom Group Space Mail Distribution List").
- Content managed by external services, such as content repositories, mail, and so on, is removed.

To delete a group space:

1. Log in, and from the **Group Spaces** menu at the top of the application, select **My Group Spaces**.
2. On the Group Spaces page, click the Actions icon for the group space you want to delete, then select **Delete Group Space** (Figure 14–14).

Figure 14–14 Deleting a Group Space



3. Click **Delete** to confirm or **Cancel** to preserve the group space.

14.8 Managing Group Space Templates

The **Templates** page in **My Group Spaces** displays out-of-the-box seeded group space templates (see Section 13.2, "What You Should Know About Group Space Templates"), group space templates that you create and own (see Section 13.10, "Creating Your Own Group Space Templates"), and published templates available for general use.

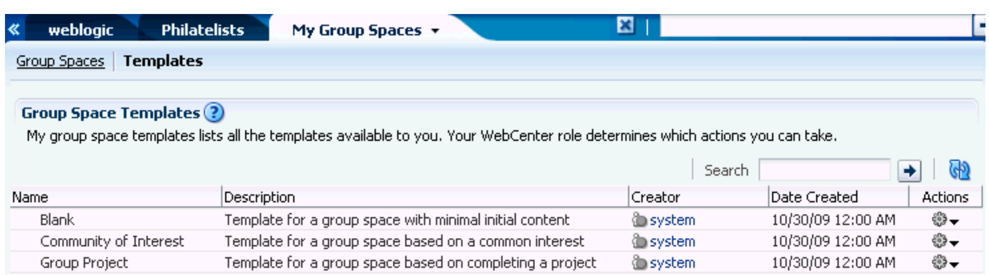
Use the **Templates** page in **My Group Spaces** to:

- View a list of group space templates available to you.
- Search for a group space template by a string in the Name or Description.
- Publish group space templates for others to use, or hide templates from others.
- Delete group space templates that you own. Only template owners and the WebCenter Spaces administrator can delete group space templates.

To manage group space templates:

1. From the **Group Spaces** menu at the top of the application, select **My Group Spaces**.
2. Click the **Templates** tab to display the **Templates** page (Figure 14–15).

Figure 14–15 Templates Page



3. To list one or more specific group space templates, enter a full or partial search term in the **Search** field, then click the Search icon to refresh the list with all group space templates for which a match is found in the **Name** or **Description**.

To clear the current search string and display all group space templates, click the Clear Search icon.

4. To refresh the list of group space templates, first ensure that any prior search is cleared (click the Clear Search icon), then click the Refresh icon.
5. Under **Actions**, click the Actions icon for a selected group space template to perform any of the following actions:
   - Depending on the current state of the template, select either:
     – **Make Group Space Template Private** to hide a published template from all WebCenter Spaces users (except the template creator). This action is available only to the template creator and users granted the `Group Space Templates-Manage` permission by the WebCenter Spaces administrator.
     – **Publish Group Space Template** to publish a private template to all WebCenter Spaces users. This action is available only to the template creator, who can see the private template on the **Templates** page. Users with `Group Space Templates-Manage` permission do not see private templates created by other users on the **Templates** page, but can see them on the **WebCenter Administration > Group Spaces > Templates** page. To view the **WebCenter Administration > Group Spaces > Templates** page, a user must additionally be granted `Application-Configure` permission by the WebCenter Spaces administrator. For more information, see "Publishing and Hiding Group Space Templates" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter*.

     Note: When you select a template on which to base a new group space (see Section 13.3, "Creating a New Group Space"), then subsequently the template is made private by another user before you have completed creating the group space, the template remains valid for your use while you are still creating the group space.

   - **Delete Group Space Template** to permanently remove a group space template from WebCenter Spaces. This action is available only to the template creator and users granted the `Group Space Templates - Manage` permission by the WebCenter Spaces administrator.

     Note: Out-of-the-box templates (Group Project, Community of Interest, and Blank) cannot be deleted. WebCenter Spaces administrators and users granted the `Group Space Templates-Manage` permission can however hide these built-in templates from everyone's view by making them private on the **WebCenter Administration > Group Spaces > Templates** page (`Application-Configure` permission must be granted to view this page). For more information, see "Managing Group Space Templates" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter*.

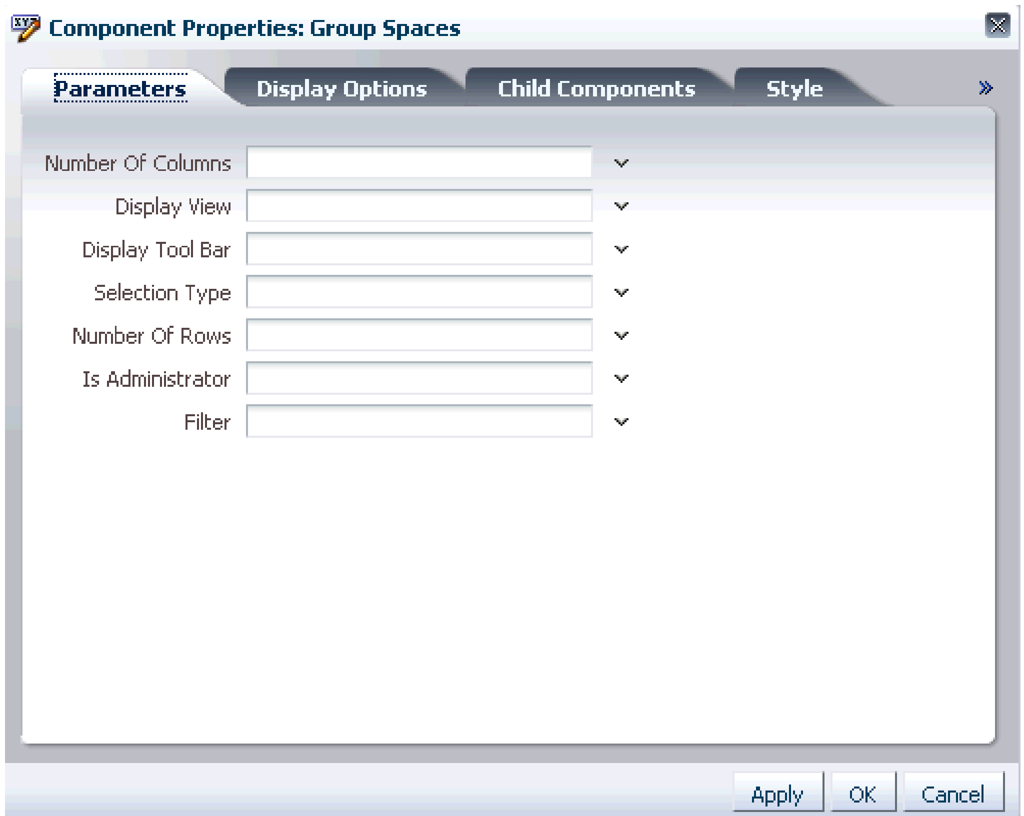
14.9 Working with the Group Spaces Task Flow

For the steps to add a Group Spaces task flow to a page, see Section 10.1.4, "Adding Task Flows to a Page."

14.9.1 Setting Group Spaces Task Flow Properties

The Group Spaces task flow has associated properties, which users with sufficient privileges can access through the Component Properties dialog in Oracle Composer (Figure 14–16). Many properties are common to all task flows, and the method for accessing task flow properties is the same from task flow to task flow. Common task flow properties and how to access them are discussed in Section 10.4, "Setting Properties on Page Content."

Figure 14–16 Group Spaces Task Flow Component Properties



The properties on the **Parameters** tab of the Component Properties dialog control the default task flow content and facilitate the wiring of the task flow to page parameters and page definition variables. These properties are unique to the task flow type. For more information, see Section 10.4.3, "Working with Component Parameters." For information about wiring pages and components, see Chapter 11, "Wiring Pages, Task Flows, Portlets, and UI Components."

Changes to the properties on the **Display Options**, **Style**, and **Content Style** tabs affect the appearance and behavior of the task flow for all users. These properties are common to all task flows. For more information, see Section 10.4.4, "Working with Component Display Options" and Section 10.4.7, "Working with Style and Content Style Properties."

The content of the **Events** tab depends on the events supported by the task flow. For more information, see Section 10.4.8, "Working with Component Contextual Events."

The **Child Components** tab displays all of the components contained within the current component. It provides controls for rearranging, showing, and hiding child components. Not all components contain children. So you may find this tab devoid of content. For more information, see Section 10.4.6, "Working with Child Components."

All properties on the **Parameters** and **Display Options** tabs provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the **Edit** icon next to a property field to open the editor. For more information about using the editor and for descriptions of common EL expressions, see Section 10.4.5, "Using Expression Language (EL) Expressions with Component Properties."

Table 14–1 describes the properties that are unique to the Group Spaces task flow.

Table 14–1 Group Spaces Task Flow Properties: Parameters Tab

Property	Description
`Display Tool Bar`	A Boolean value representing whether the tool bar displays. Enter either `true` or `false`. Default: `true`
`Display View`	The type of view in which to show all the group spaces. Enter `list` for list view or `card` for card view. Default: `card`
`Filter`	A filter condition that specifies which group spaces should display in the Group Spaces task flow. Enter `all`, `joined`, `moderated`, `public`, or `discoverable`. Default: `joined`
`Is Administrator`	A Boolean value representing whether administrative functions (such as import/export) are available for the task flow. Enter either `true` or `false`. If set to `true`, administrative functions are available only to users who have administrative permissions. Default: `false`
`Number of Columns`	The number of columns displayed per page in card view. The total number of group spaces displayed per page in both card view and list view is `Number of Columns` * `Number of Rows`. Default: `4`
`Number of Rows`	The number of rows displayed per page in card view. The total number of group spaces displayed per page in both card view and list view is `Number of Columns` * `Number of Rows`. Default: `4`

15

Managing Group Space Members and Roles

This chapter provides information about managing group space members and roles. It contains the following sections:

- Setting Up the Group Space Membership Policy
- Managing Group Space Roles and Permissions
- Managing Members and Assigning Roles
- Working with the Members Task Flow

Audience

This chapter is intended for users who are responsible for managing group space members and their role assignments. It describes how to set up a group space membership policy and define member roles and responsibilities.

This chapter is intended for users assigned, minimally, the group space `Moderator` role or a custom role that includes the default permissions granted to a moderator.

The WebCenter Spaces administrator has the authority to expose or hide some group space features and services. Contact your WebCenter Spaces administrator if some tasks discussed in this chapter are not available to you.

Note: For more information about group space roles, see Section 15.2.1, "What You Should Know About Group Space Roles and Permissions".

15.1 Setting Up the Group Space Membership Policy

Group space moderators determine the membership policy for their group space, choosing between an "invitation only" membership policy, allowing WebCenter users to join themselves by subscribing to (and unsubscribing from) the group space, adding new members directly, or using any combination of these membership options.

Enabling self-subscription does not necessarily mean that users automatically gain access to a group space. Moderators can still control who joins (or leaves) the group space through an approval process.

Default membership permissions are derived from the template used to create the group space. Group space moderators can change these settings at any time. This section describes:

- Managing Self-Subscription and Membership Changes for a Group Space
- Managing Approval Requirements for Group Space Unsubscription

15.1.1 Managing Self-Subscription and Membership Changes for a Group Space

As a group space moderator, you may want to limit access to a group space, or allow WebCenter users to self-subscribe to a group space without an invitation.

Additionally, you may allow WebCenter users to join a group space or change their group space membership without approval, or require approval for certain roles. When membership requests require approval, new members do not automatically gain access when they subscribe to a group space. Instead, the moderator receives a subscription notification to either accept or reject.

To manage self-subscription and membership changes for a group space:

1. Click the **Settings** tab, then the **General** tab.
2. On the **General** page, under **Self-Subscription / Change Membership**:
   - To disallow non-members from subscribing to the group space and members requesting changes to their current membership, select **Do Not Allow Self-Subscription and Change Membership** (Figure 15–1).

Figure 15–1 Disabling Self-Subscription

   - To allow non-members to subscribe to the group space and members to request changes to their current membership, select **Make All Roles Available on Self-Subscription and Change Membership**.

     Note: If you select this option, ensure that **Discoverable** is also selected to make the group space known to people through searches and on their **Group Spaces** page (see Section 13.12.1, "Making a Group Space Known (Discoverable)").

     When you select this option, the following additional options become available for the group space on the **Group Spaces** page in **My Group Spaces**:

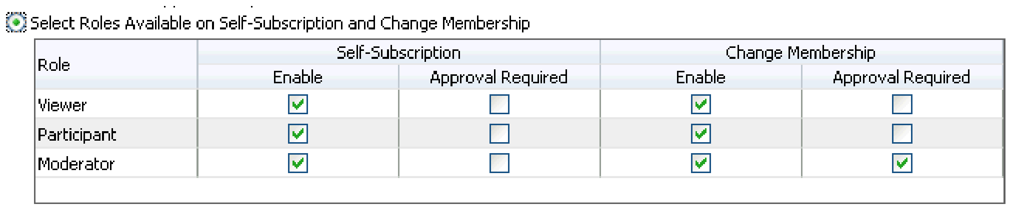
     – Group spaces that allow self-subscription display a **Join Space** button in the Group Space Information dialog box (click the Actions icon for the group space, then select **About Group Space**, as described in Section 12.3, "Subscribing to a Group Space").

     – Click the Actions icon for the group space, then select **Change Roles/Unsubscribe**.

3. To be notified of self-subscription requests to approve them before users become members of the group space, select **Moderator Approval Required**.
4. To specify which roles users see on the Self-Subscription page and the Change Membership page, select **Select Roles Available on Self-Subscription and Change Membership** to display a table showing all the roles available (Figure 15–2).

- Select **Enable** to offer the role on the Self-Subscription or Change Membership pages. Clear **Enable** to hide a role.
- Select **Approval Required** to specify that moderator approval is required before the request is granted. The request is sent to the moderator's Worklist to approve or reject (if the group space has multiple moderators, all moderators receive the request; only one moderator must process the request). Clear **Approval Required** to allow the change without moderator approval.

Figure 15–2 Customizing Member Roles


Select Roles Available on Self-Subscription and Change Membership

Role	Self-Subscription		Change Membership	
	Enable	Approval Required	Enable	Approval Required
Viewer	☑	☐	☑	☐
Participant	☑	☐	☑	☐
Moderator	☑	☐	☑	☑

5. Click **Apply** to save.

New members can now subscribe to this group space. For more information, see Section 12.3, "Subscribing to a Group Space".

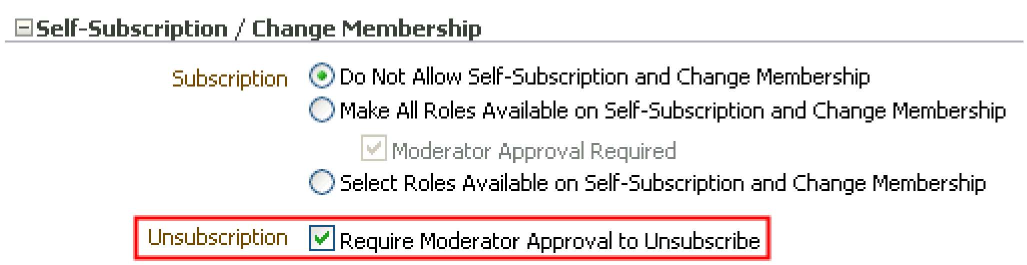
15.1.2 Managing Approval Requirements for Group Space Unsubscription

If moderator approval is required to unsubscribe from a group space, an unsubscription request is sent to the moderator's Worklist when a member unsubscribes to either accept or reject.

To configure approval options for group space unsubscription:

1. Click the **Settings** tab, then the **General** tab.
2. On the **General** page, under **Self-Subscription / Change Membership** (Figure 15–3):
   - To specify that moderator approval is required before unsubscription requests are granted, select **Require Moderator Approval to Unsubscribe**.
   - To allow unsubscription without approval, clear **Require Moderator Approval to Unsubscribe**.

Figure 15–3 Specifying Unsubscribe Request Approval Requirements



3. Click **Apply** to save.

15.2 Managing Group Space Roles and Permissions

The group space moderator is responsible for setting up roles to control what members can do in the group space. Group space moderators can manage permission assignments for existing group space roles, create new group space roles, and delete roles that are no longer required.

This section describes how group space moderators manage roles and permissions of group space members:

- What You Should Know About Group Space Roles and Permissions
- Defining Custom Group Space Roles
- Viewing and Editing Permissions of a Group Space Role
- Deleting a Group Space Role

15.2.1 What You Should Know About Group Space Roles and Permissions

When a group space moderator creates a new group space, WebCenter Spaces automatically creates defaults roles, each assigned default permissions. If the default roles do not meet the needs of the group space, the group space moderator can define custom roles. This section provides the following information:

- Understanding the Default Group Space Roles
- Understanding Group Space Permissions
- Understanding Custom Group Space Roles

15.2.1.1 Understanding the Default Group Space Roles

WebCenter Spaces automatically creates several default roles for a new group space, as shown in Table 15–1.

> **Note:** These default roles are always available for group spaces based on out-of-the-box templates (Blank, Group Project, and Community of Interest). Group spaces based on user-defined templates may offer a different set of default roles. The default permissions assigned to the default roles are shown in Table 15–2.

Table 15–1 Default Roles for Group Spaces

Group Space Role	Description	Modify Permissions	Delete Role
`Moderator`	The `Moderator` role is automatically assigned to the creator of a group space. This role is automatically granted the highest level of permissions by default, as shown in Table 15–2. The group space moderator or anyone with group space `Manage` permission can modify permissions as necessary and appropriate.	Yes (except for `Manage group space`)	No
`Participant`	The `Participant` role is automatically granted the default permissions shown in Table 15–2. The group space moderator or anyone with group space `Manage` permission can grant additional permissions as necessary and appropriate.	Yes	Yes

Table 15–1 (Cont.) Default Roles for Group Spaces

Group Space Role	Description	Modify Permissions	Delete Role
`Viewer`	The `Viewer` role is automatically granted the default permissions shown in Table 15–2. The group space moderator or anyone with group space `Manage` permission can grant additional permissions as necessary and appropriate.	Yes	Yes
`Public-User`	Any user with access to Oracle WebCenter Spaces who is not logged in assumes the `Public-User` role. Users with the `Public-User` role have no access to group space information by default. Such users are anonymous, unidentified, and group space permissions must be granted by the group space moderator or anyone with group space `Manage` permission (see Section 15.2.3, "Viewing and Editing Permissions of a Group Space Role" and Section 13.12.3, "Granting Public Access to a Group Space"). Note: `Manage` and `Edit` permissions for the Announcements service and the `Manage` permission for the Discussions service do not take effect for the `Public-User` role.	Yes	No
`Spaces-User`	The `Spaces-User` role is given to authenticated users of Oracle WebCenter Spaces, with no access to group space information by default. Once logged in, users assigned this role have access to their own personal space, and inherit any permissions granted to the `Public-User` role. Additional group space permissions must be granted by the group space moderator or anyone with group space `Manage` permission (see Section 15.2.3, "Viewing and Editing Permissions of a Group Space Role"). The `Spaces-User` role cannot be directly granted permissions for the Announcements, Discussions, or Documents services; see Section 15.2.3, "Viewing and Editing Permissions of a Group Space Role" for steps to give the `Spaces-User` role access to these services.	Yes	No

15.2.1.2 Understanding Group Space Permissions

Group space members can perform actions in the group space as specified by the permissions assigned to their role. Table 15–2 lists the default permissions associated with a group space, group space pages, and group space services.

Note: The `Manage` permission inherits the privileges of all "lesser" permissions. Besides `Manage`, no permission inherits the privileges of any other permission. Therefore, be careful to assign the appropriate set of permissions to allow users to perform required actions. For example, whenever you assign the `Create` permission, select the `View` permission too.

Table 15–2 Group Space Permissions

Group Space Element	Permissions	Roles Granted Permission By Default
Group Space Access	**Manage** - Manage group space membership, assign permissions and roles, manage service availability, and can delete the group space. Includes `Configure` and `View` permissions.	`Moderator`
	Configure - Set general and service-related properties for the group space. Users with the `Configure` permission must be allowed to view the group space.	

	View - View the group space. To view group space pages (and page content), access to each individual group space page is required.	`Participant`
		`Viewer`
		`Public-User`

Group Space Services (Pages, Events, Links, Lists, and Notes)	**Full Access** - Manage page access and group space content. Also, manage group space events, links between group space objects, lists, and notes. Specifically, users with this permission can perform the following operations within the group space: ■ Pages - Manage, create, delete, edit, personalize, and view pages ■ Events - Create, delete, edit, and view events ■ Links - Create, and delete links ■ Lists - Create, delete, edit, update, and view lists ■ Notes - Create, delete, edit, and view events	`Moderator`
	Design - Edit page properties, pages access, and page content. This permission does not enable group space members to work with lists, events, links, and notes. These actions require the **Group Space Services - Contribute** permission.	`Moderator` `Participant`
	Contribute - Personalize group space pages, and work with lists, events, links, and notes.	`Moderator` `Participant`

	View - View group space pages, lists, events, links, and notes.	`Moderator`
		`Participant`
		`Viewer`
		`Public-User`

Announcements	**Manage** - Perform any operation on announcements associated with the group space. Includes `Edit` and `View` permissions. Note: The `Manage` permission does not take effect for the `Public-User` role.	`Moderator`

Table 15–2 (Cont.) Group Space Permissions

Group Space Element	Permissions	Roles Granted Permission By Default
	Edit - Edit announcements. Users with the `Edit` permission must be allowed to view announcements. Note: The `Edit` permission does not take effect for the `Public-User` role.	`Participant`
	View - View announcements.	`Participant` `Viewer`
Discussions	**Manage** - Perform any operation on the discussion forum category associated with the group space. Includes `Edit` and `View` permissions. Note: The `Manage` permission does not take effect for the `Public-User` role.	`Moderator`
	Edit - Post topics, and reply to topics. Users with the `Edit` permission must be allowed to view discussions.	`Participant`
	View - View discussions.	`Participant` `Viewer`
Documents	**Manage** - Perform any operation on files and folders associated with the group space.	`Moderator`
	Delete - Delete files and folders associated with the group space. Users with the `Delete` permission must be allowed to create and view files and folders.	`Moderator` `Participant`

	View - Browse through files and folders.	`Moderator`
		`Participant`
		`Viewer`

	Create - Create and update files and folders. Users with the `Create` permission must be allowed to view files and folders. *Note*: any user with `Documents-Create` permission can delete any documents that they create or own, even if they do not have `Documents-Delete` permission.	`Moderator` `Participant`

15.2.1.3 Understanding Custom Group Space Roles

If the default roles do not serve group space requirements, the group space moderator can define custom roles that better suit its members. See Section 15.2.2, "Defining Custom Group Space Roles".

Alternatively, group space moderators can modify the permissions assigned to the default roles. See Section 15.2.3, "Viewing and Editing Permissions of a Group Space Role".

15.2.2 Defining Custom Group Space Roles

If the default roles provided by WebCenter Spaces do not meet the needs of the group space, you can define custom roles to better suit the requirements of the group space members.

To create a group space role:

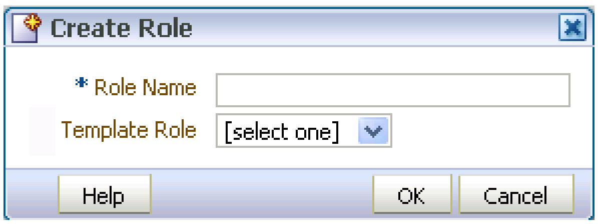
1. Click the **Settings** tab, then the **Roles** tab.

   On the **Roles** page, current roles defined for this group space display as columns in the table.

2. To define a new role for this group space, click **Create Role**.

   The Create Role dialog box opens (Figure 15–4).

Figure 15–4 Creating a New Group Space Role



3. Enter a suitable **Role Name**. Names can contain only alphanumeric characters and underscores. Ensure that role names are self-descriptive to make it as obvious as possible which group space member should belong to which roles.

4. Optionally, choose a **Template Role**.

   The new role inherits permissions from the template role. You can modify these permissions in the next step. If you do not choose a template role, the new role is created with no permissions.

   Choose **Moderator** to create a role that inherits full administrative group space privileges. Choose **Viewer** (if available) to create a role starting with minimal, view-only privileges.

5. Click **OK**.

   The new role appears as a column in the table on the **Roles** page. The permissions list shows which actions users with this role can perform.

6. To modify permissions for the role, select or clear each permission check box.

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

7. Click **Apply** to save the custom role.

15.2.3 Viewing and Editing Permissions of a Group Space Role

The **Roles** page lists permissions available for the group space, the group space pages, and services that have been enabled for the group space. If a service is not shown, then either no permissions are required for that service (for example, the Mail service), or the service is disabled in the group space. For more information, see Section 14.3.1, "Enabling and Disabling Services Available to a Group Space".

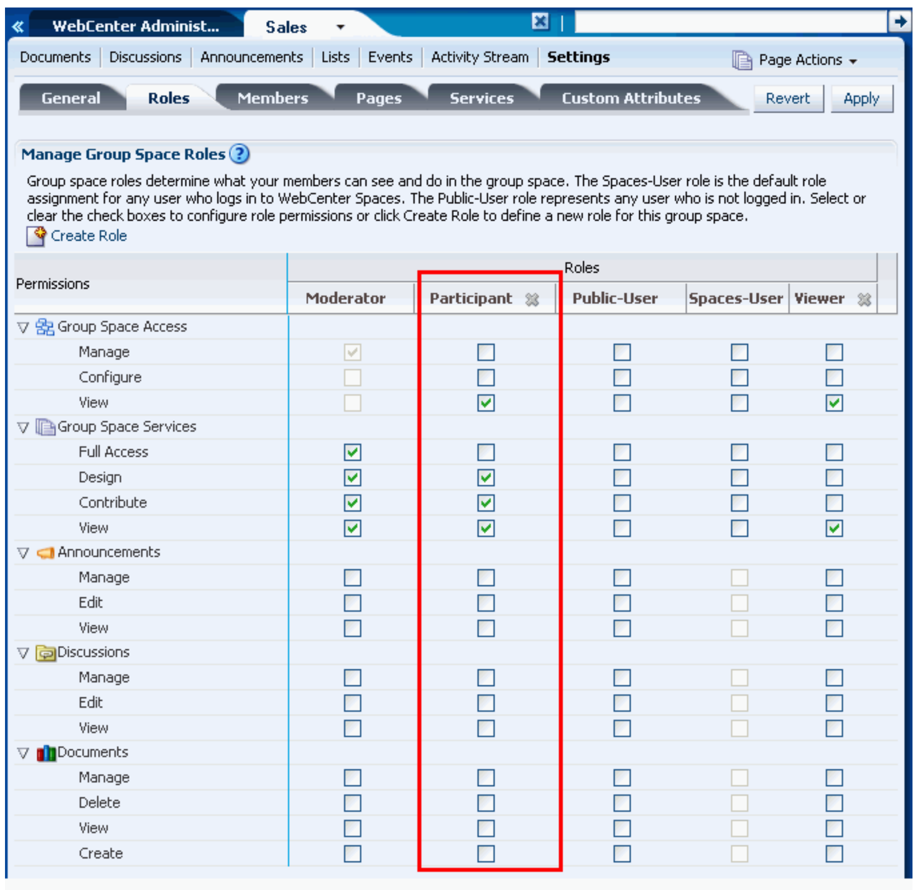
If the default permissions assigned by WebCenter Spaces do not meet the needs of the group space, or you want to change previously assigned group space permissions, you can modify the permissions to better suit the requirements of the group space roles.

> **Note:** The `Moderator` role permissions for the group space (`Group Space Access - Manage`, `Configure`, `View`) cannot be modified.

To change the permissions assigned to a group space role:

1. Click the **Settings** tab, then the **Roles** tab.
2. On the **Roles** page, select or clear the check boxes to enable or disable permissions for a role (Figure 15–5).

Figure 15–5 Modifying Group Space Permissions



3. Click **Apply** to save.

New permissions are effective immediately.

> **Note:** For more detailed information about granting access permissions to a group space, and to individual group space pages, refer to Section 13.12.2, "Granting WebCenter Spaces Users Access to a Group Space".

15.2.4 Deleting a Group Space Role

When a group space role is no longer required, the group space moderator can remove it from the group space. This helps maintain a valid role list and prevents inappropriate role assignment.

Note: The roles `Moderator`, `Spaces-User`, and `Public-User` cannot be deleted.

To delete a group space role:

1. Click the **Settings** tab, then the **Roles** tab.
2. On the **Roles** page, click the **Delete** icon next to the role you want to delete (Figure 15–6).

Figure 15–6 Deleting a Group Space Role

3. In the Delete Role confirmation dialog box, click **Delete** to confirm that you want to delete the role.

15.3 Managing Members and Assigning Roles

This section describes how group space moderators manage group space membership. It includes the following subsections:

- What You Should Know About Group Space Membership
- Viewing Group Space Members
- Adding Members to a Group Space
- Composing Messages to New Members
- Changing Member Role Assignments
- Approving Requests for Group Space Membership
- Communicating with Moderators and Members of a Group Space
- Revoking Group Space Membership

15.3.1 What You Should Know About Group Space Membership

Member participation is central to any group space. It is the group space moderator's responsibility to manage group space membership and determine member participation through the permissions assigned to the various roles defined for the group space. A group space can gather members in several ways:

- If a group space is marked as discoverable (see Section 13.12.1, "Making a Group Space Known (Discoverable)"), it can be made known to anyone logged in to WebCenter Spaces through searches and on the **Group Spaces** page in **My Group Spaces**.
- If a group space is made public (see Section 13.12.3.1, "Making a Group Space Public"), it is available to anyone with access to the WebCenter Spaces instance that contains the group space if the `Public-User` role has been granted the appropriate permissions.
- A group space moderator can add or invite individual members or groups at the time a group space is created, or later (see Section 15.3.4, "Adding Members to a Group Space").

15.3.2 Viewing Group Space Members

To review current membership for a group space:

1. Click the **Settings** tab, then the **Members** tab.
2. In the **Manage Group Space Members** section, review the current list of members and their current role assignment.
3. Click **Switch to Icon View** or **Switch to List View** to see member details.

15.3.3 Composing Messages to New Members

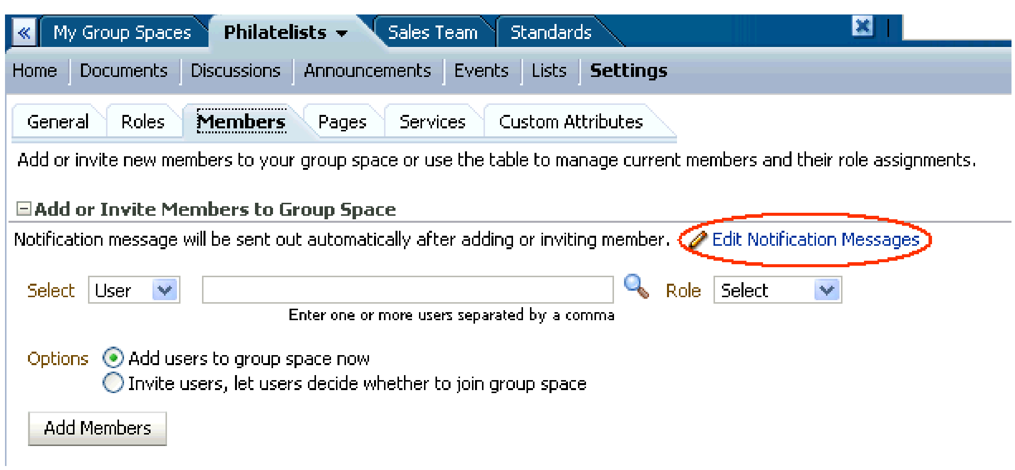
When you add or invite someone to your group space, they receive a message through the Mail service (if configured) and through their Worklist (if Worklists are set up). Before you start recruiting new members, take some time to compose suitable greetings and messages for the following scenarios:

- Adding a WebCenter Spaces user as a member of your group space.
- Inviting a WebCenter Spaces user to join your group space.
- Inviting someone to register with WebCenter Spaces and join your group space.

To compose messages sent out to new members:

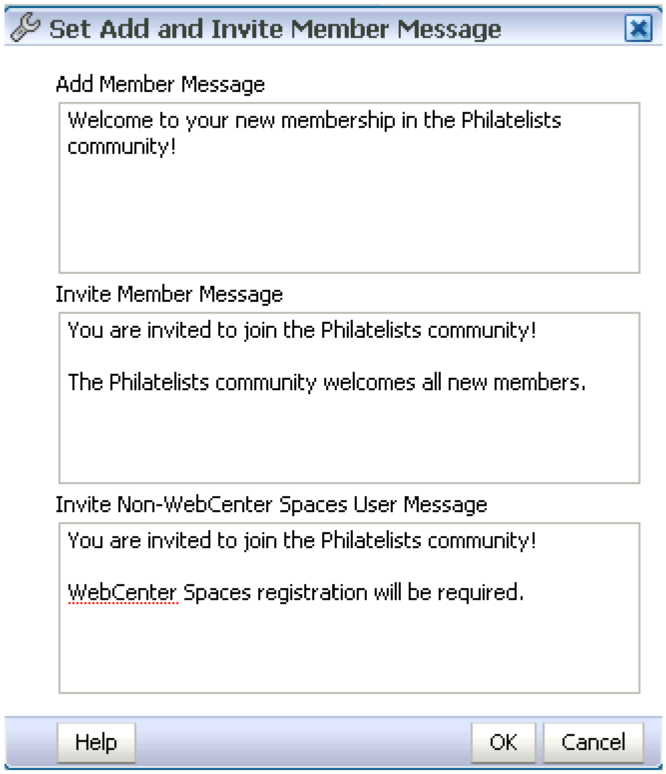
1. Click the **Settings** tab, then the **Members** tab.
2. On the **Members** page, click **Edit Notification Messages** (Figure 15–7).

Figure 15–7 Editing Messages to New Members



3. Enter a short message to include in group space membership notifications or invitations in the appropriate sections, as required (Figure 15–8). Use the message text to describe the group space and how it might be of use to new members.

Figure 15–8 Composing Messages to New Members



4. Click **OK** to save.

15.3.4 Adding Members to a Group Space

This section describes various ways that a group space moderator can enlist group space members:

- Adding or Inviting a WebCenter Spaces User
- Allowing a WebCenter Spaces User to Self-Subscribe
- Inviting a Non-WebCenter Spaces User

15.3.4.1 Adding or Inviting a WebCenter Spaces User

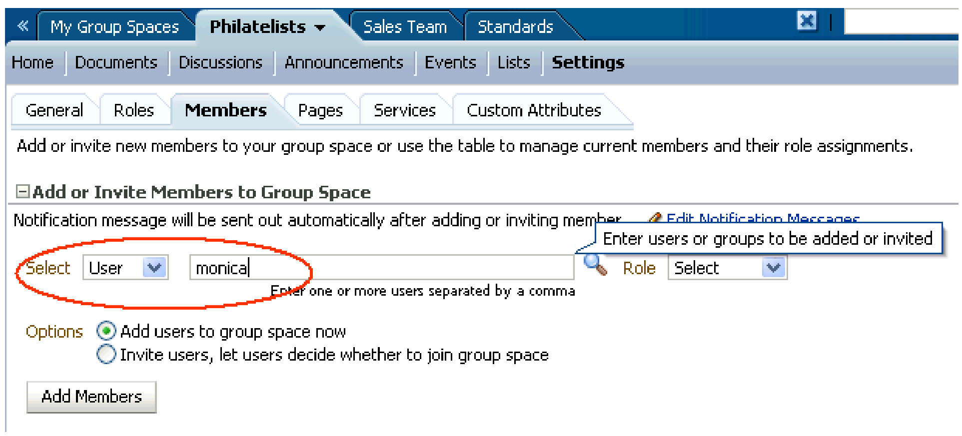
As a group space moderator, you can add or invite registered WebCenter Spaces users to become members of your group space. WebCenter Spaces users receive notification through the Mail service (if configured) and through their Worklist (if Worklists are set up).

To add or invite a member to your group space:

1. Click the **Settings** tab, then the **Members** tab.
2. On the **Members** page, click **Edit Notification Messages** to edit the greeting messages sent to all new added and invited members (see Section 15.3.3, "Composing Messages to New Members").

3. Under **Add or Invite Members to Group Space**, from the **Select** list:
   - Select **User** to add or invite one or more individual users to the group space.
   - Select **Group** to add or invite multiple users belonging to a named user group in the identity store.
4. Enter one or more user or group names in the entry field, separated by commas (Figure 15–9).

Figure 15–9 Adding a New Member



5. If you are not sure of a user or group name, click the Find icon to search the WebCenter Spaces identity store (see "Configuring the Identity Store" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter*). In the Find User or Find Group dialog box, enter—minimally—two consecutive characters of the name for which you are searching. Click the Search icon, and all names matching your search criteria appear in the results area. Select one or more user names from the list, and click **OK**.

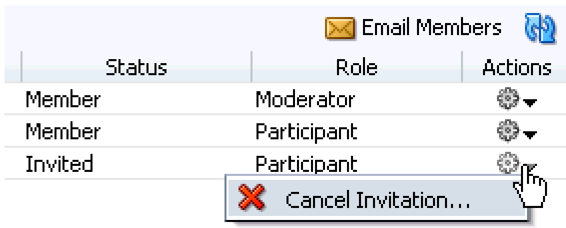
   > **Notes:** Adding a `Public-User` to a group space does not make the group space available to the public. To find out how to make a group space public, see Section 13.12.3.1, "Making a Group Space Public".

6. Select a **Role** for the new (or invited) group space members. If the role you want is not listed, create a role that meets your requirements (see Section 15.2.2, "Defining Custom Group Space Roles").
7. Select the method for adding the specified users to the group space:
   - **Add users to group space now** to add new users immediately and automatically to the group space.
   - **Invite users, let users decide whether to join group space** to send new users an invitation to join the group space.

   Membership notifications and invitations are sent through the Mail service (if configured) and display in the users' Worklist (if Worklists are set up), with the message you have composed in the Set Add and Invite Member Message dialog box (see Section 15–8, "Composing Messages to New Members"). The notification or invitation includes a link to the group space.
8. Click **Add Members** or **Invite Members**, depending on the selection in Step 7.

9. To cancel an invitation to prospective members with **Invited** status, click the Actions icon, and select **Cancel Invitation** (Figure 15–10).

Figure 15–10 Viewing Invited Members



15.3.4.2 Allowing a WebCenter Spaces User to Self-Subscribe

Self-subscription allows a WebCenter Spaces user to request group space membership without an invitation from the group space moderator. Certain types of group spaces, especially interest-based communities, are particularly suited to this form of member enrollment as the group space often reaches a wider audience.

The capabilities of self-subscribed members depends on which group space roles you decide to offer on the Self-Subscription page. For more information, see Section 15.1.1, "Managing Self-Subscription and Membership Changes for a Group Space".

15.3.4.3 Inviting a Non-WebCenter Spaces User

If your WebCenter Spaces application allows unregistered people to become group space members, a group space moderator can invite anyone with a valid mail address to join the group space. Prospective members receive an invitation by mail, inviting them to join the group space. Upon accepting the invitation, unregistered users are prompted to register with WebCenter Spaces before gaining access to the group space.

To invite someone outside the WebCenter Spaces community to join your group space:

1. Click the **Settings** tab, then the **Members** tab.
2. On the **Members** page, click **Edit Notification Messages** to edit the greeting message that is sent to non-WebCenter Spaces users (see Section 15.3.3, "Composing Messages to New Members").
3. Under **Invite Non-WebCenter Spaces Users**:

> **Note:** The **Invite Non-WebCenter Spaces Users** section displays only when both of the following are checked on the WebCenter Spaces Administration **General** page, under **Self-Registration**:
>
> - **Allow Self-Registration Through Invitations**
> - **Allow Public Users to Self-Register**

- Enter the **Email Address(es)** for one or more prospective group space members, separated by commas.
- Select a **Role** for the prospective members. If the role you want is not listed, create a role that meets your requirements (see Section 15.2.2, "Defining Custom Group Space Roles").
- Click **Invite**.

Prospective members receive an mail invitation to join the group space with the message you compose in the **Invite Non-WebCenter Spaces User Message** section of the Set Add and Invite Member Message dialog box (see Section 15–8, "Composing Messages to New Members"). The invitation includes a secure, self-registration URL that the invited party can click to register with WebCenter Spaces and accept group space membership (see Section 12.3.2, "Subscribing to a Group Space (Unregistered WebCenter Spaces User)".

15.3.5 Changing Member Role Assignments

Moderators can change a member's role at any time. Users are notified of membership changes through their Worklist.

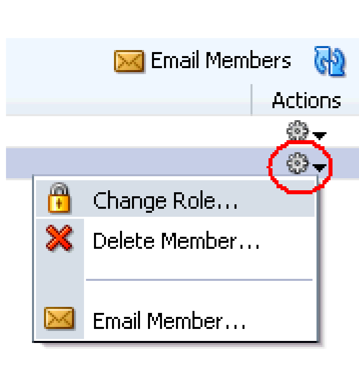
To change a member's current role:

1. Click the **Settings** tab, then the **Members** tab.
2. Display group space member details in *list view*:

   Switch to List View - Displays detailed information for each group space member and an **Action** icon that enables you to change their group space role assignment or revoke their group space membership.

   Switch to Icon View - Displays the name, role, and a small picture for each group space member. Click the member's name to access their full profile.
3. Click the **Actions** icon for the appropriate member, and select **Change Role** (Figure 15–11).

Figure 15–11 Changing a Member Role



4. In the Change Role dialog box, choose a role from the **Change Role To** list, which includes all the roles shown on the **Roles** page, except `Public-User` and `Spaces-User`.

   If you are not sure which role to choose, click the **Roles** tab to determine the range of actions that current roles allow (see Section 15.2.3, "Viewing and Editing Permissions of a Group Space Role"). If the existing roles do not meet your requirements, consider creating a new role (see Section 15.2.2, "Defining Custom Group Space Roles").
5. Click **OK**.

15.3.6 Approving Requests for Group Space Membership

If someone requests membership of your group space or an existing member requests a new role, a notification appears in your Worklist. As group space moderator, you can approve or reject these requests.

The person making the request receives notification of your decision. If you reject a request, you should explain the reasons why.

For details, see Chapter 31, "Working with the Worklist Service".

15.3.7 Communicating with Moderators and Members of a Group Space

You can send messages to individual group space members, and also to the moderator(s) or all the members of a group space. WebCenter creates a default distribution list for every group space if the Mail Server is Microsoft Exchange and active directory connection details (LDAP) are provided in the mail server connection settings. As members leave or join the group space, WebCenter updates the default distribution list.

For information about setting up a custom group space mail distribution list, see Section 14.3.2, "Configuring a Custom Group Space Mail Distribution List".

There are several ways to communicate with the moderator(s) and members of a group space:

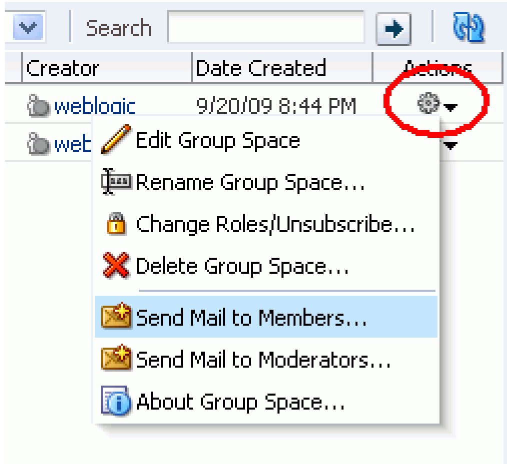
- (Group space moderators/members only) Sending a Message from the Group Spaces Page
- (Group space moderators only) Sending a Message from the Members Page
- (Group space moderators/members and non-members) Contacting the Group Space Moderator(s)

15.3.7.1 Sending a Message from the Group Spaces Page

(Group space members only) To send a message to the group space moderator(s) or all group space members from the **Group Spaces** page:

1. From the **Group Spaces** menu at the top of the application, select **My Group Spaces**.
2. On the **Group Spaces** page, find the group space to which you want to send mail. If it is not shown, use **Filter** or **Search** to list it (see Section 12.2, "Viewing Available Group Spaces").
3. Under **Actions**, click the Group Space Actions icon (Figure 15–12) for a selected group space, then select **Send Mail to Members** or **Send Mail to Moderators**. These options are available only to group space members:

Figure 15–12 Group Space Actions Menu



15.3.7.2 Sending a Message from the Members Page

(Group space moderators only) To send a message to all group space members, or an individual group space member, from the **Members** page:

1. Click the **Settings** tab, then the **Members** tab.
2. On the **Members** page, under **Manage Group Space Members**:
   - To send a message to all members of the group space, click **Send Mail**.
   - To send a message to an individual member of the group space, switch to card view, click the Actions icon for the member (Figure 15–13), and then select **Send Mail**.

Figure 15–13 Sending Messages to Group Space Members

15.3.7.3 Contacting the Group Space Moderator(s)

Even if you are not a group space member, you can contact the group space moderator(s) in the following ways:

- Contacting Moderator(s) from the Group Spaces Page
- Contacting Moderators from the Actions Menu

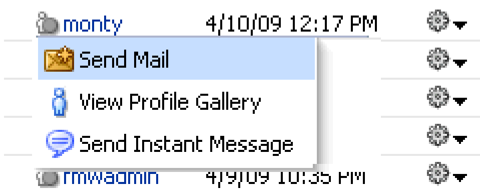
15.3.7.3.1 Contacting Moderator(s) from the Group Spaces Page

(Group space members and non-members) To contact the group space moderator(s) from the **Group Spaces** page:

1. From the **Group Spaces** menu at the top of the application, select **My Group Spaces**.

2. On the **Group Spaces** page, find the group space to which you want to send mail. If it is not shown, use **Filter** or **Search** to list it (see Section 12.2, "Viewing Available Group Spaces").
3. Under **Creator**, click the moderator's name for a selected group space to display a range of contact options (Figure 15–14), and select your preferred option.

Figure 15–14 Contacting Group Space Moderator

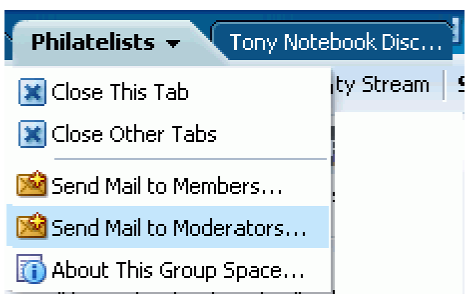


15.3.7.3.2 Contacting Moderators from the Actions Menu

(Group space members and non-members) To send a message to the group space moderator(s) from the group space tab's actions menu:

- On the group space tab, click the down arrow icon to display the actions menu, and select **Send Email to Moderators** (Figure 15–15).

Figure 15–15 Send Email to Moderator(s) Option on Group Space Actions Menu



15.3.8 Revoking Group Space Membership

A group space moderator can revoke user membership at any time. Users receive notification through their Worklist when you cancel their membership.

To revoke group space membership:

1. Click the **Settings** tab, then the **Members** tab.
2. If necessary, click **Switch to Card View**.
3. Click the **Actions** icon (Figure 15–16) for the member you want to remove, and then select **Delete Member**.

Figure 15–16 Removing a Group Space Member

4. In the Delete Member dialog box, click **Delete** to confirm.

15.4 Working with the Members Task Flow

WebCenter Spaces provides a Members task flow, which lists all the members of a particular group space.

This section includes the following subsections:

- What You Should Know About the Members Task Flow
- Managing Group Space Membership Through the Members Task Flow
- Contacting All Group Space Members
- Contacting Individual Group Space Members
- Sorting Members
- Filtering Members
- Setting Members Task Flow Properties

15.4.1 What You Should Know About the Members Task Flow

The Members task flow enables you to get an at-a-glance view of the members of a group space. It lists the members of the group space and also shows each user's role within the group space, for example, Moderator, Participant, and Viewer. The Members task flow also provides a quick way of getting to the group space's Settings page where you can manage group space membership, if you have the appropriate permissions.

15.4.2 Managing Group Space Membership Through the Members Task Flow

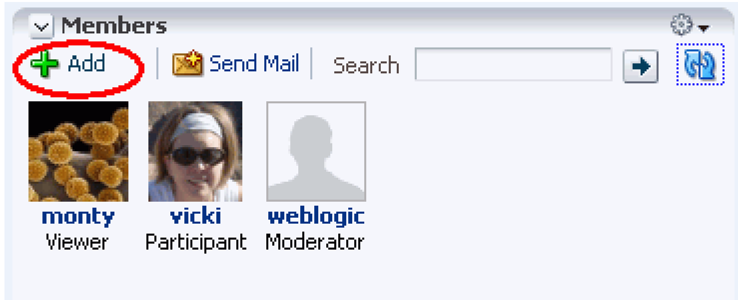
Group space moderators can quickly access the tools for managing group space membership from the Members task flow.

To manage group space membership:

1. Log in and locate the Members task flow.
2. In the Members task flow, click the **Add** icon (Figure 15–17).

   The **Add** icon only displays to group space moderators or members with the `Group Space Access -Manage` permission.

Figure 15–17 The Add Icon in the Members Task Flow



3. This takes you to the **Members** tab of the Settings page where you can add members as described in Section 15.3.4.1, "Adding or Inviting a WebCenter Spaces User."

4. On the **Members** tab, you can also remove members, invite users to join the group space, and edit exiting members' roles within the group space. For more information, see Section 15.3, "Managing Members and Assigning Roles."

15.4.3 Contacting All Group Space Members

If you have a message to send to all members of the group space, you can do this from the Members task flow.

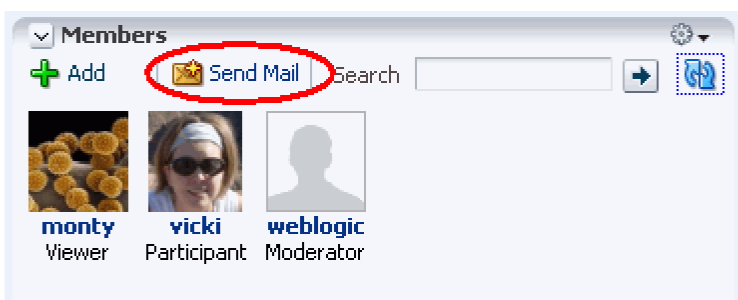
To contact all group space members:

1. Log in and locate the Members task flow.

2. In the Members task flow, click the **Send Mail** icon (Figure 15–18).

   You may 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, then you can start your message right away. For more information about login credentials and preferences, see Chapter 3, "Setting Your Personal Preferences."

Figure 15–18 Send Mail Icon in the Members Task Flow



3. Compose your message and click **Send**.

15.4.4 Contacting Individual Group Space Members

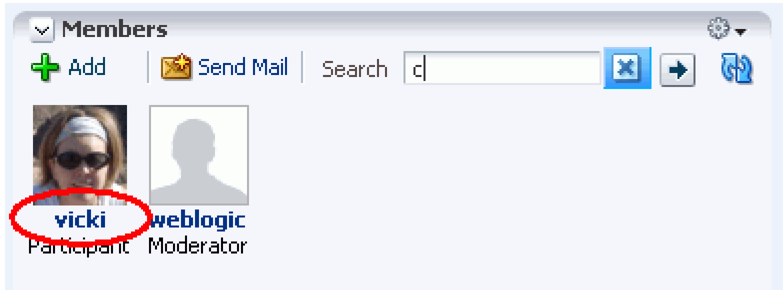
It's easy to contact a group space member from the Members task flow:

To contact a group space member:

1. Log in and locate the Members task flow.

2. In the Members task flow, click the name of the member you want to contact (Figure 15–19).

Figure 15–19 Contacting a Member Using the Members Task Flow



When you click a member's name their profile summary displays. From here, you can contact the member by mail, send them an instant message, and so on. See also, Section 25.2.2.1, "Viewing Profile Details".

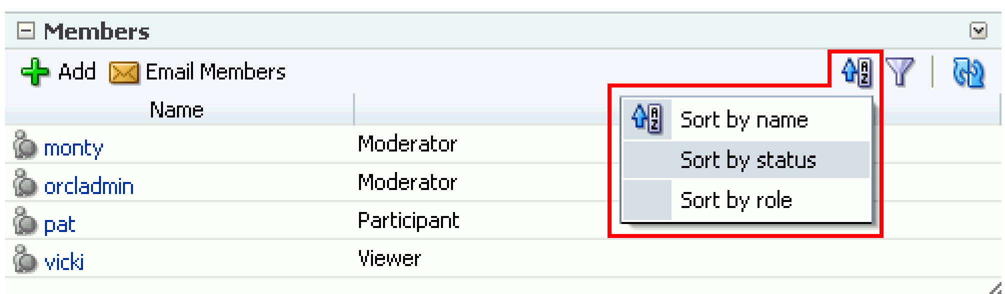
15.4.5 Sorting Members

You can sort the list of group space members either by name or by status.

To sort the list of group space members:

1. Log in and locate the Members task flow.
2. In the Members task flow, click the **Sorting options** icon, and choose a sort option (Figure 15–20).

Figure 15–20 Sorting Options in the Members Task Flow



Choose from:

- **Sort by name**—To sort the list alphabetically, from 1 to 9 and a to z
- **Sort by status**—To sort by the member's status: *online*, *busy*, *away*, *offline*
- **Sort by role**—To sort by the member's role: *Moderator*, *Participant*, *Viewer*

15.4.6 Filtering Members

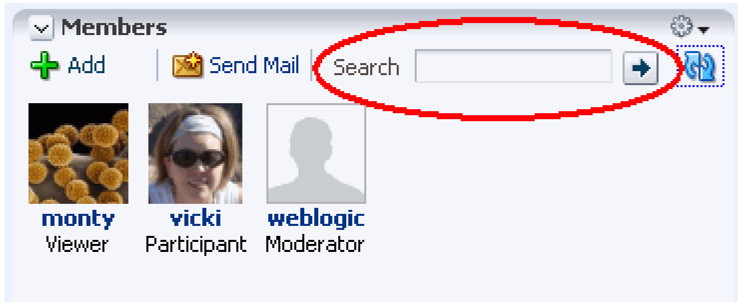
Use filtering to help find a particular group space member in the Members task flow.

To filter the list of group space members:

1. Log in and locate the Members task flow.

2. In the Members task flow, enter a full or partial name in the Search field (Figure 15–21), and then click the Search arrow icon to the right of the field.

Figure 15–21 Search Field in the Members Task Flow

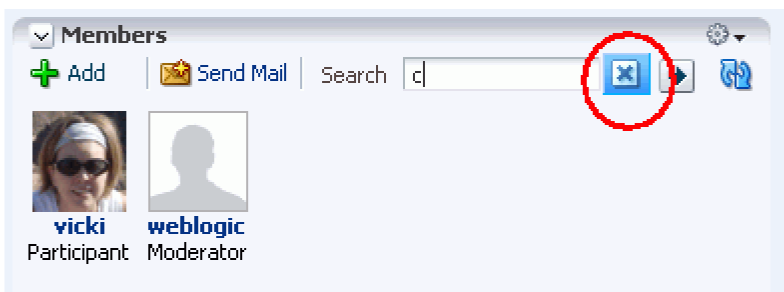


3. The list of members refreshes, displaying only those members that match the search term.

   Filtering searches against a listed member's user name. For example, if your search criteria is "c", the search results might include members named "chris", "vicki", or "weblogic".

4. To return the list of members to its default display, click the **Clear Search** icon (Figure 15–22).

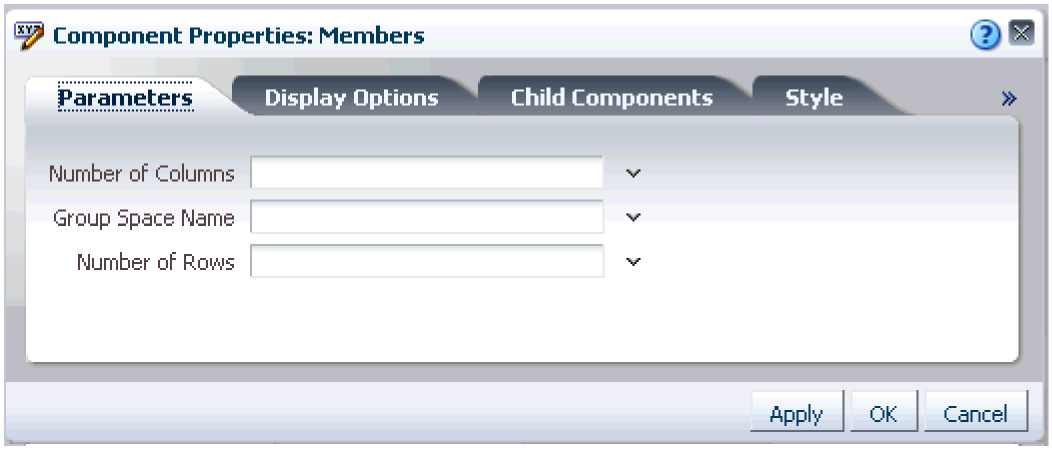
Figure 15–22 Clear Search Icon in the Members Task Flow



15.4.7 Setting Members Task Flow Properties

The Members task flow has associated properties, which users with sufficient privileges can access from the Component Properties dialog in Oracle Composer (Figure 15–23). Many properties are common to all task flows, and the method for accessing task flow properties is the same from task flow to task flow. Common task flow properties and how to access them are discussed in Section 10.4, "Setting Properties on Page Content."

Figure 15–23 Member Task Flow Component Properties



The properties on the **Parameters** tab of the Component Properties dialog control the default task flow content and facilitate the wiring of the task flow to page parameters and page definition variables. These properties are unique to this task flow. For more information, see Section 10.4.3, "Working with Component Parameters." For information about wiring pages and components, see Chapter 11, "Wiring Pages, Task Flows, Portlets, and UI Components."

Changes to the properties on the **Display Options**, **Style**, and **Content Style** tabs affect the appearance and behavior of the task flow for all users. These properties are common to all task flows. For more information, see Section 10.4, "Setting Properties on Page Content."

The contents of the **Events** tab depend on the events supported by the task flow. For more information, see Section 10.4.8, "Working with Component Contextual Events."

The **Child Components** tab displays all of the components contained within the current component. It provides controls for rearranging, showing, and hiding child components. Not all components contain children. So you may find this tab devoid of content. For more information, seeSection 10.4.4, "Working with Component Display Options." and Section 10.4.6, "Working with Child Components."

All properties on the **Parameters** and **Display Options** tabs provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the **Edit** icon next to a property field to open the editor. For more information about using the editor and for descriptions of common EL expressions, see Section 10.4.5, "Using Expression Language (EL) Expressions with Component Properties."

Table 15–3 describes the properties that are unique to the Members task flows.

Table 15–3 Members Task Flow Properties: Parameter Tab

Property	Description	Task Flow
`Group Space Name`	The name of the group space for which to display members. Members of the current group space display by default. Use this parameter to display member details for a different group space. You can obtain a group space's name from its About Group Space dialog. Express values using the following formats: ■ **Constant**—Express a constant value, such as `Marketing`. ■ **Page parameter**—Enter a page parameter to grab the value from the page on which the task flow is placed. For more information, see Chapter 11, "Wiring Pages, Task Flows, Portlets, and UI Components." ■ **EL expression**—The default. Enter an Expression Language (EL) expression.	Members
`Number of Columns`	The number of columns used to display group space members. The default is null which means 'no limit' and in this case member details wrap to fill the entire width of the task flow. To fix the number of members displayed in each row, enter the number of 'columns' you require. Horizontal scroll bars display if there is not enough space to display the number of members specified here. Express values using the following formats: ■ **Constant**—Express a constant value, such as `2` or `5`. ■ **Page parameter**—Enter a page parameter to grab the value from the page on which the task flow is placed. For more information, see Chapter 11, "Wiring Pages, Task Flows, Portlets, and UI Components." ■ **EL expression**—The default. Enter an Expression Language (EL) expression.	Members
`Number of Rows`	The number of rows used to display group space members. The default is null which means that member details wrap to fill the space available. Vertical scroll bars display if there is not enough space to display all the members. To fix the maximum number of rows displayed, enter the number of 'rows' you require. Previous and Next buttons automatically display if more member details are available. Express values using the following formats: ■ **Constant**—Express a constant value, such as `2` or `5`. ■ **Page parameter**—Enter a page parameter to grab the value from the page on which the task flow is placed. For more information, see Chapter 11, "Wiring Pages, Task Flows, Portlets, and UI Components." ■ **EL expression**—The default. Enter an Expression Language (EL) expression.	Members

Part IV

Services A Through N

Part IV of this guide provides information about Oracle WebCenter Services (A through N). It provides an overview of each service and describes how to use service task flows and how to configure task flow properties. It and contains the following chapters:

16 Working with the Announcements Service

This chapter describes how to use the features provided through the Announcements service. Announcements offer a quick, convenient way to create and distribute messages instantly or at a time you specify. You can use the Announcements service to view, create, and manage announcements.

This chapter includes the following sections:

Audience

This chapter is intended for WebCenter Spaces users interested in viewing, creating, and managing announcements. Much of this information also applies to custom WebCenter applications, though it is written with WebCenter Spaces users in mind. (For information about custom WebCenter applications, see "Integrating the Announcements Service" in *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter*.)

Your application administrator has the authority to expose or hide task flows from a particular service. Tasks discussed in this chapter are not available to you if the relevant service is hidden.

16.1 What You Should Know About the Announcements Service

The Announcements service provides the ability to post announcements about important activities and events to all authenticated users. For example, an application administrator can use this service to announce the availability of a new feature or the need to shut down the application temporarily for maintenance.

The Announcements service is integrated with many WebCenter services, such as the RSS, Search (to search announcement text), Instant Messaging and Presence, and Recent Activities services. You can use the Links service to link announcements to other services, such as Events or Discussions. For example, suppose your company is announcing a new product, you can link from the announcement directly to a discussion forum, where potential customers can ask other customers about the product, or link to an instant messenger to speak directly with a customer service representative to purchase the product.

In group spaces, announcements are scoped to the group space where you create them. In personal space pages, announcements are scoped application-wide, to all logged-in (authenticated) users.

This section contains the following topics:

- Section 16.1.1, "Understanding the Announcement Manager Task Flow"
- Section 16.1.2, "Understanding the Announcements Task Flow"

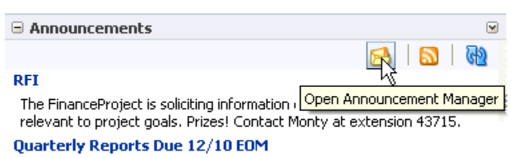
16.1.1 Understanding the Announcement Manager Task Flow

Use the Announcement Manager task flow to manage announcements. The Announcement Manager task flow (Figure 16–1) can be accessed only by users with `manage` privilege on the page. By default, this privilege is available to a group space moderator.

Figure 16–1 Announcement Manager Task Flow

Click the **Open Announcement Manager** icon in the Announcements task flow (Figure 16–2) to access the Announcement Manager.

Figure 16–2 Open Announcement Manager Icon in Announcement Task Flow



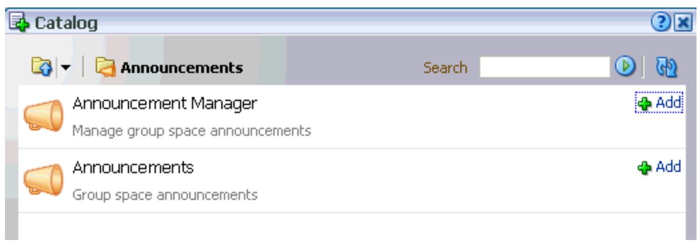
Adding the Announcement Manager Task Flow to a Page

The Announcement Manager is available as a task flow that qualified users can add to their group space pages. If you have the required privilege, the Announcement Manager task flow is displayed in the Oracle Composer Catalog (Figure 16–3).

Notes:

- You cannot add an Announcement Manager task flow to your personal space page. The Announcement Manager task flow only displays in the component catalog if you have `manage` privilege and if you are adding content in a group space page. If you have the manage privilege, then you can access the Announcement Manager from the Announcements task flow from your personal space. For more information, see Section 16.1.2, "Understanding the Announcements Task Flow."
- All instances of the Announcement Manager task flow in an application run against the same server and therefore, it serves no purpose to add multiple Announcement Manager task flow instances.

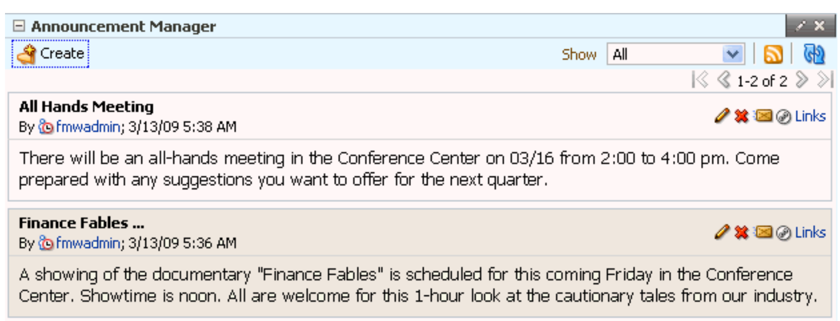
Figure 16–3 Announcement Manager Task Flow in the Catalog



You can add this task flow to your page by clicking the **Add** link next to the task flow. For information about accessing the Oracle Composer Catalog and adding task flows to your page, see Section 10.1.4, "Adding Task Flows to a Page."

The Announcement Manager task flow is then displayed on your page as shown in Figure 16–4.

Figure 16–4 Announcement Manager Task Flow on a Page



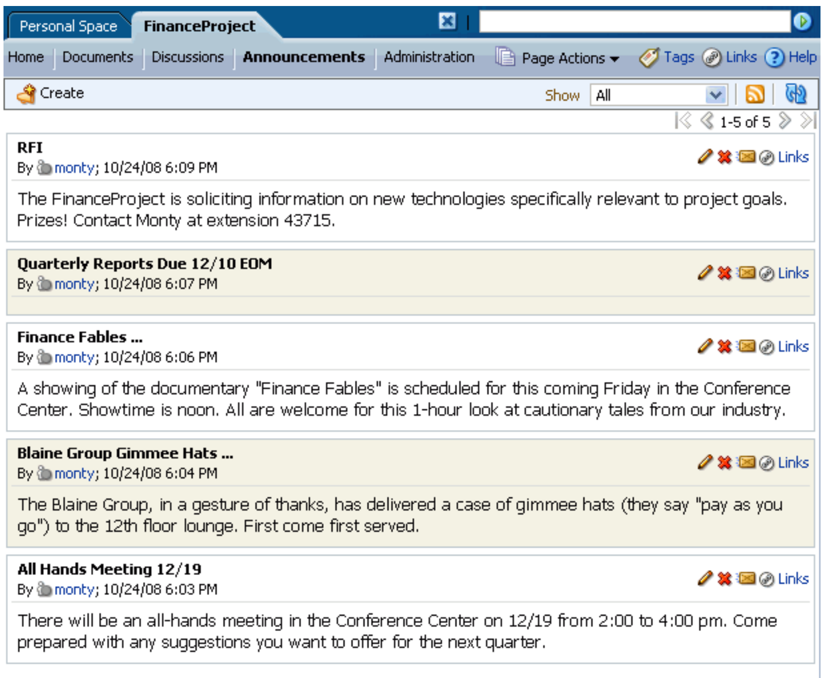
The Announcement Manager provides options to create, edit, and delete announcements, send an e-mail regarding a selected announcement, and link another WebCenter object to a selected announcement (Figure 16–4). However, depending on the privileges you have on the page and whether the required WebCenter services are configured in your application, you may see only a subset of these options in the Announcement Manager. For example, the **Mail** icon displays only if the Mail service is configured in your application, and the Delete icon is displayed only to users with `manage` privilege.

The Announcement Manager task flow also provides the **Show** list, which you can use to personalize your view of announcements.

In group spaces, by default the **Announcements** page contains the Announcement Manager task flow (Figure 16–5). The **Announcements** page is available in every group space, provided the group space is configured to display announcements. For information about enabling services in a group space, see Section 14.3.1, "Enabling and Disabling Services Available to a Group Space."

> **Note:** In group spaces, you can also create a custom page and add the Announcement Manager task flow to that page.

Figure 16–5 The Announcements Page in a Group Space



Users with Edit privileges can access the task flow's region parameter through the Component Properties dialog in Oracle Composer to specify the ID of the discussion forum under which announcements must be created. For information about accessing the Component Properties dialog and editing properties, see Section 10.4.2, "Setting Component Properties."

> **Note:** The Announcement Manager task flow opened from the sidebar opens in a group space, regardless of the discussion forum ID specified.

For more information about setting task flow properties, see Section 16.3, "Setting Announcements Service Task Flow Properties."

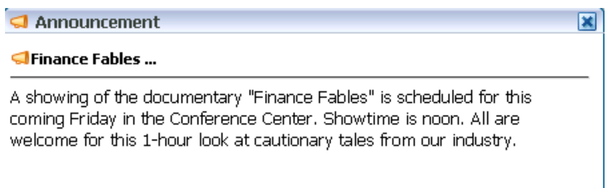
16.1.2 Understanding the Announcements Task Flow

The Announcements task flow is a read-only view of the Announcements service that provides convenient access to current announcements (Figure 16–6). The amount of information displayed in an Announcements task flow depends on the property values provided for the task flow instance.

Figure 16–6 The Announcements Task Flow

But when you add an Announcements task flow to the page, by default the task flow displays only the titles of announcements as links. Clicking a link opens the complete announcement in a separate dialog (Figure 16–7). Unlike announcement content displayed in the Announcement Manager (as plain text), this dialog displays content with all the formatting that was applied to it.

Figure 16–7 An Announcement Accessed from an Announcement Link



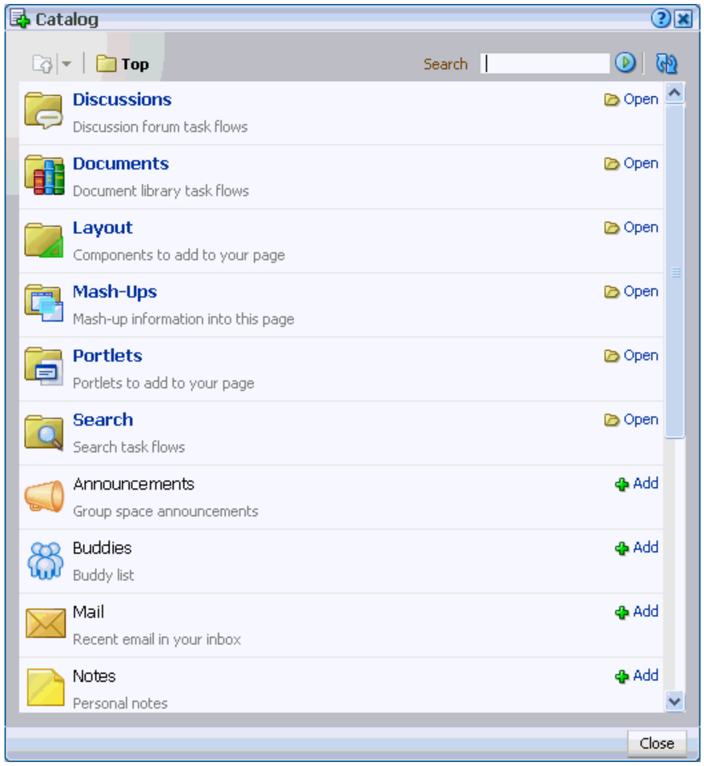
You can set the Announcements task flow's region parameters to show a limited number of characters below the announcement title. For more information, see Section 16.3, "Setting Announcements Service Task Flow Properties."

Adding the Announcement Task Flow to the Page

You can add an Announcements task flow to your page from the Oracle Composer Catalog (Figure 16–8). Next to the Announcement task flow, click the **Add** link to add it to the page. For more information about accessing the Catalog and adding task flows to a page, see Section 10.1.4, "Adding Task Flows to a Page."

> **Note:** All instances of the Announcements task flow in an application run against the same server and it serves no purpose to add multiple Announcements task flow instances. This is true for all service task flows that require connections to back-end servers, for example, task flows from Discussions, Mail, and IMP services.

Figure 16–8 Announcements Task Flow in the Catalog



Like the Announcement Manager task flow, the Announcements task flow provides the **Show** list to personalize your view of announcements.

Users with Edit privilege can access the task flow's region parameters through the Component Properties dialog in Oracle Composer to specify how to display information and how much information to display in the task flow. For information about accessing the Component Properties dialog and editing properties, see Section 10.4.2, "Setting Component Properties."

For more information about task flow properties, see Section 16.3, "Setting Announcements Service Task Flow Properties."

16.2 Working with Announcements Service Task Flows

Both Announcement Manager and Announcements task flows display current announcements. The Announcement Manager additionally offers tools for managing announcements. This section provides information about using the Announcements service task flows.

Depending on the privileges you have on the page, you can perform some or all tasks described in this section:

- View announcements in the Announcement Manager task flow—Discussions server administrators in personal spaces, and group space moderators in group spaces.
- Create announcements—All participants in WebCenter Spaces.
- Edit announcements—Creator of the announcement in WebCenter Spaces applications, discussions server administrators in personal spaces, and group space moderators in group spaces.

- Delete announcements—Discussions server system administrators in personal spaces, and group space moderators in group spaces

This section contains the following subsections:

- Section 16.2.1, "Adding an Announcements Service Task Flow to a Page"
- Section 16.2.2, "Working with the Announcement Manager Task Flow"
- Section 16.2.3, "Working with the Announcements Task Flow"

16.2.1 Adding an Announcements Service Task Flow to a Page

For the steps to add an Announcements service task flow to a page, see Section 10.1.4, "Adding Task Flows to a Page."

16.2.2 Working with the Announcement Manager Task Flow

The Announcement Manager task flow not only provides the tools to create, edit, and delete announcements, it also provides controls for determining when an announcement is published and when it expires and is consequently removed from the task flow. Additionally, after you create an announcement, you are automatically offered the option to mail the announcement to whomever you choose.

This section provides information about viewing, creating, and managing announcements through the Announcement Manager task flow. Discussions server administrators in personal spaces and group space moderators in group spaces can access the Announcement Manager task flow. This section contains the following subsections:

- Section 16.2.2.1, "Viewing Announcements in the Announcement Manager"
- Section 16.2.2.2, "Adjusting Your View of the Announcement Manager"
- Section 16.2.2.3, "Creating an Announcement"
- Section 16.2.2.4, "Editing Announcements"
- Section 16.2.2.5, "Deleting an Announcement"

16.2.2.1 Viewing Announcements in the Announcement Manager

The Announcement Manager task flow is available only to authorized users, typically group space moderators in WebCenter Spaces.

To view announcements in the Announcement Manager task flow:

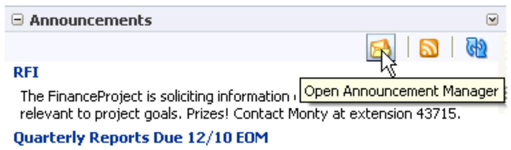
1. Log in to WebCenter, and click the **Announcements** tab to bring the **Announcements** page forward.

   If the **Announcements** tab is not available, then click the **Settings** tab, the **Services** tab, then select the **Announcements** page. When the **Announcements** tab displays on the **Announcements** page, select the **Announcements** tab to bring the page forward. For more information, see Section 2.5, "Hiding, Showing, Opening, and Closing Pages."

   Alternatively, click the **Open Announcement Manager** icon in the Announcements task flow (Figure 16–9) to view the Announcement Manager task flow.

Note: The **Open Announcement Manager** icon does not display in the Announcements task flow if you do not have the required privileges.

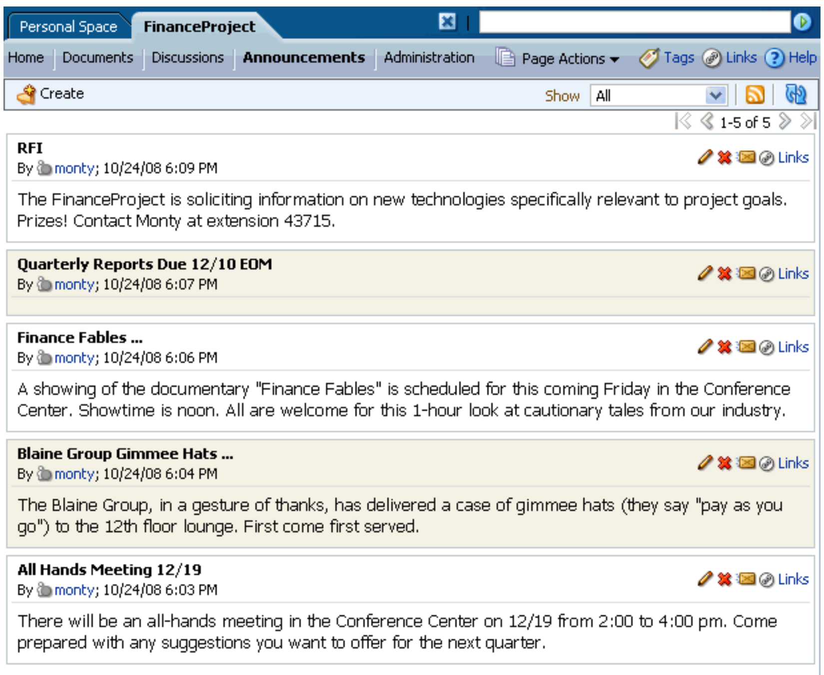
Figure 16–9 Open Announcement Manager Icon in Announcement Task Flow



The Announcement Manager displays as follows:

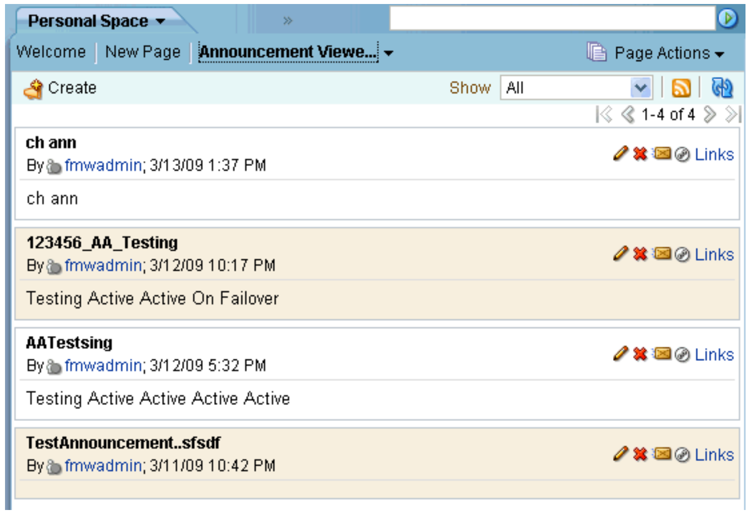
- In group spaces, the **Announcements** page containing the Announcement Manager displays (Figure 16–10).

Figure 16–10 The Announcements Page in a Group Space



- In personal spaces, the **Announcement Viewer** page is displayed containing the task flow (Figure 16–11).

Figure 16–11 Announcement Manager Invoked from Personal Space



16.2.2.2 Adjusting Your View of the Announcement Manager

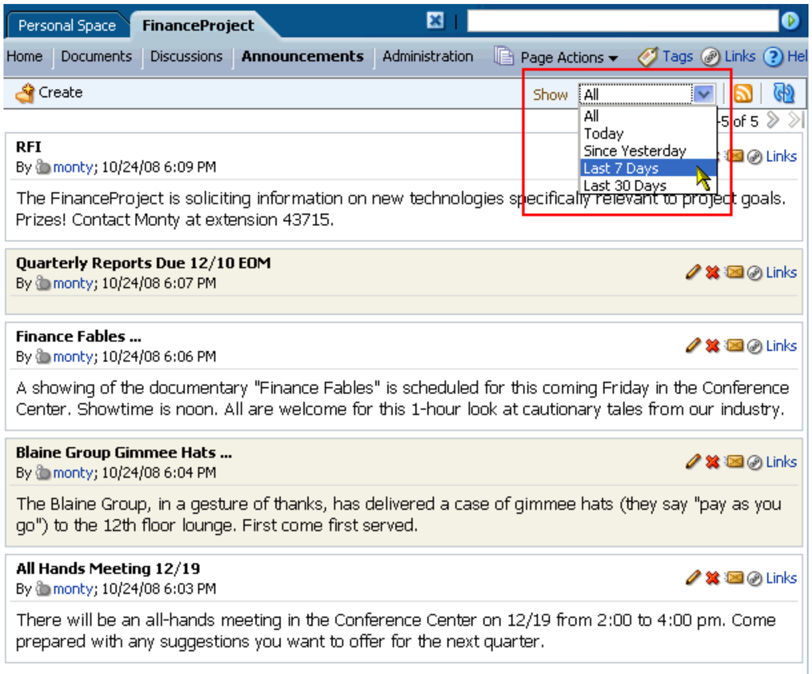
You can personalize your own view of the Announcement Manager task flow, which does not affect other users' view of the announcement. All users who can view the Announcement Manager task flow can personalize it. A **Show** list provides options for displaying only those announcements that were created 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 in the task flow. For more information, see Section 16.2.2.2, "Adjusting Your View of the Announcement Manager."

Such adjustments affect only your view; all other users' views are not affected.

To adjust your view of the Announcement Manager:

1. Go to the application page that contains the Announcement Manager task flow.
2. In the task flow, expand the **Show** menu and select from the listed display options (Figure 16–12).

Figure 16–12 Show Menu on Announcements Page in WebCenter Spaces



Choose:

- **All**— To display all available announcements.
- **Today**—To display only today's announcements.
- **Since Yesterday**—To display today and yesterday's announcements.
- **Last 7 Days**—To display all announcements made in the last seven days.
- **Last 30 Days**—To display all announcements made in the last 30 days.

The Announcement Manager task flow refreshes and displays the announcements that match your selection.

16.2.2.3 Creating an Announcement

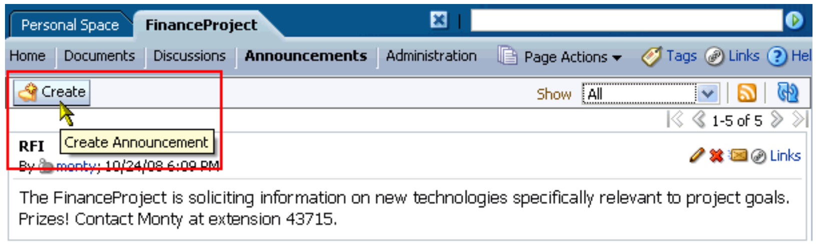
Create an announcement to distribute information to all members of an application or a group space in one operation. For example, if you are an administrator and want to shut down the application for maintenance, you can create an announcement to inform all application users about the down time. On the publication date you specify while creating the announcement, the announcement appears in the Announcement Manager and Announcements task flows, and on the Recent Activity list.

In WebCenter Spaces, all participants can create announcements.

To create a new announcement:

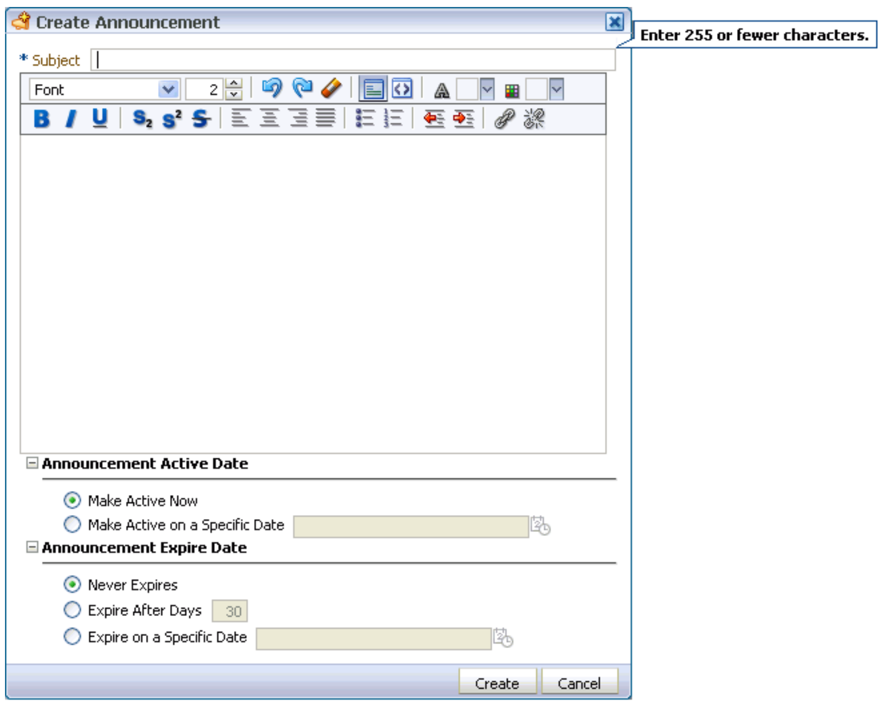
1. Access the Announcement Manager task flow. For more information, see Section 16.2.2.1, "Viewing Announcements in the Announcement Manager."
2. In the Announcement Manager task flow, click the **Create** button (Figure 16–13).

Figure 16–13 Create Button on an Announcements Page



The Create Announcement dialog opens (Figure 16–14).

Figure 16–14 The Create Announcement Dialog



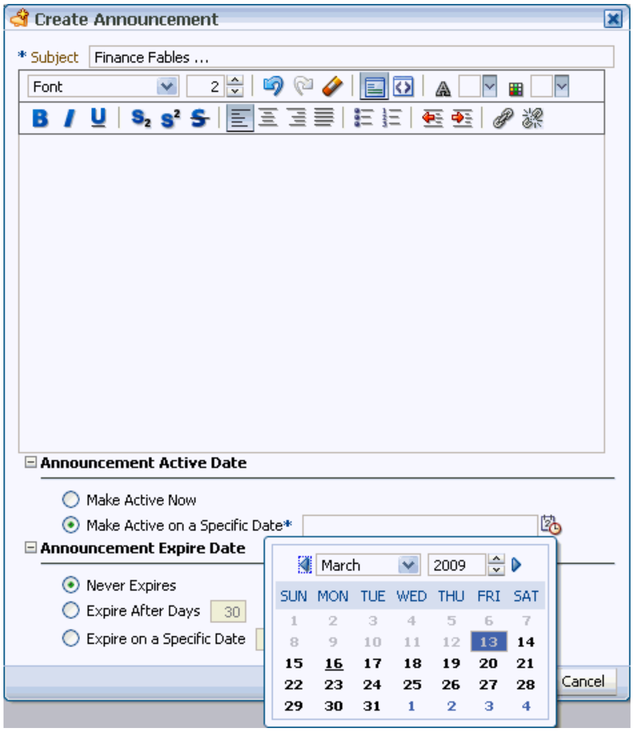
3. In the **Subject** field, enter a heading for the announcement.
4. In the message body text box, enter the text of the announcement.

   The message body is provided through the Rich Text Editor. You can style the announcement with colors, special fonts, and images. For information about Rich Text Editor controls, see Table 18–10.

   Styling information is applied when the announcement is configured with the `Content View Only` region parameter set to `true`. For more information, see Section 16.3, "Setting Announcements Service Task Flow Properties."
5. Under **Announcement Active Date**, choose:
   - **Make Active Now** — To post the announcement immediately (the default option)
   - **Make Active on Specific Date** — To select a date and time to post the announcement

Click the **Select Date** icon to the right of the text field to open the **Select Date** pop-up calendar (Figure 16–15).

Figure 16–15 The Select Date Pop-Up Calendar



In the calendar, click a date to select it. The current date is marked by a solid box.

Alternatively, use the controls at the top of the calendar to select a month and year for publication.

After you select a date, the calendar closes.

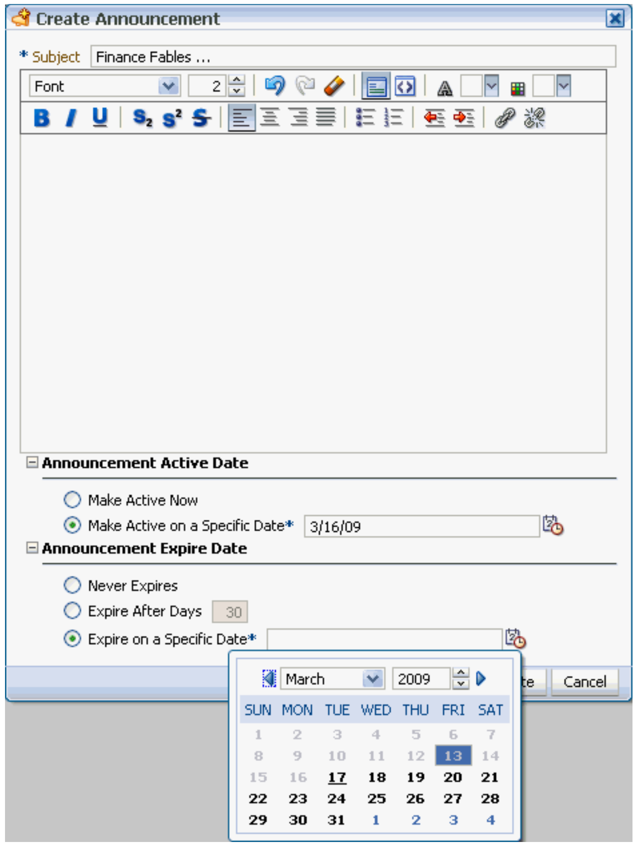
6. Under **Announcement Expire Date**, choose:

   - **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 and time to expire and remove the announcement

     Click the **Select Date** icon next to the text field to open the **Select Date** pop-up calendar (Figure 16–16).

Figure 16–16 The Select Date and Time Icon



In the calendar, only those dates after the publication date are enabled for selection.

7. Click the **Create** button to create the announcement.

   If you chose to post the announcement immediately, the new announcement appears in three locations: in any Announcements task flow included on a page, on the Recent Activity list, and at the top of the list of announcements in the Announcement Manager task flow.

16.2.2.4 Editing Announcements

Once you've created an announcement, you can easily 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 using the Announcement Manager. You can change an announcement's title and content and, also its expiration date. However, you cannot change its publication date, which is the date on which the announcement is made active (Announcement Active Date).

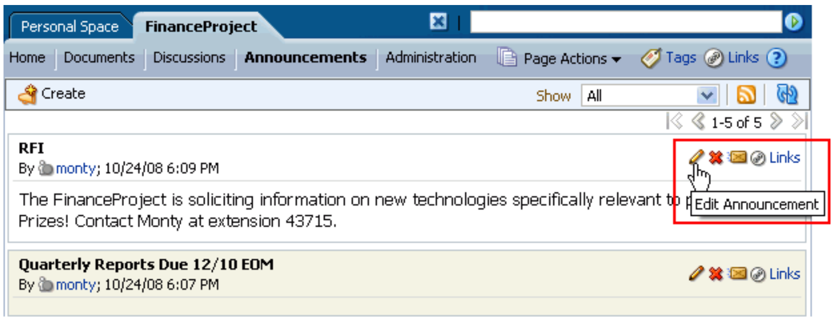
Note: To change an announcement's publication date, you must delete the announcement, and re-create it with the correct publication date. For information about deleting an announcement, see Section 16.2.2.5, "Deleting an Announcement." For information about creating an announcement, see Section 16.2.2.3, "Creating an Announcement."

You can edit an announcement only if you created that announcement or have been granted privileges to do so. Typically, group space moderators have privileges to edit all announcements in the Announcements task flow.

To edit an announcement:

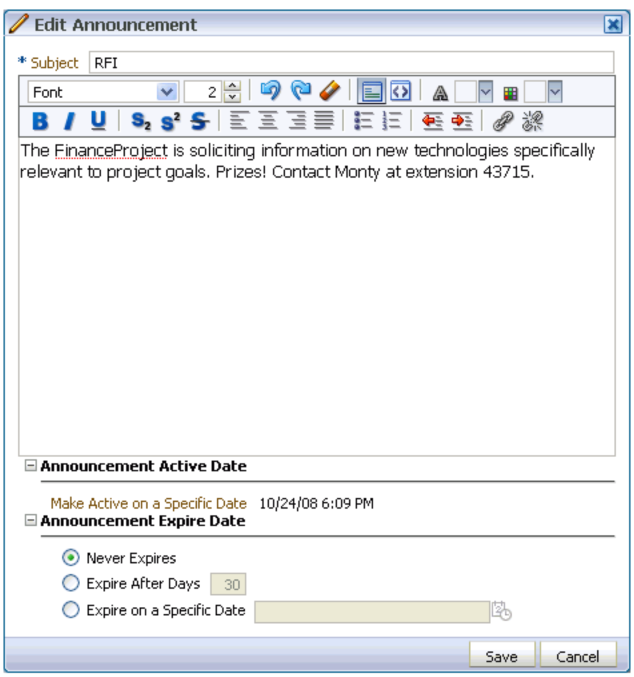
1. Open the Announcement Manager task flow. For information, see Section 16.2.2.1, "Viewing Announcements in the Announcement Manager."
2. Click the **Edit Announcement** icon (Figure 16–17) on the announcement you want to edit.

Figure 16–17 Edit Announcement Icon on an Announcement Toolbar



The Edit Announcement dialog opens (Figure 16–18).

Figure 16–18 The Edit Announcement Dialog



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 Table 18–10.

You can change an announcement's title and content and, also its expiration date. However, you cannot change its publication date.

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

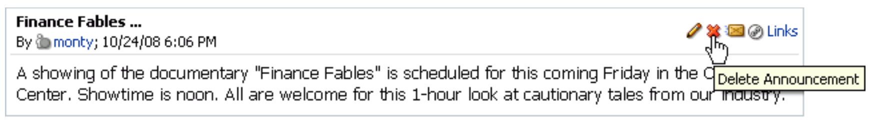
16.2.2.5 Deleting an Announcement

Once you've created an announcement, you can delete it if you are a group space moderator. Other users do not have privileges to delete announcements.

To delete an announcement:

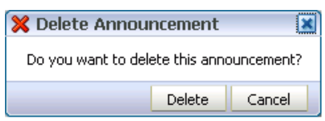
1. Open the Announcement Manager task flow. For information, see Section 16.2.2.1, "Viewing Announcements in the Announcement Manager."
2. Click the **Delete Announcement** icon on the announcement you want to delete (Figure 16–19). This icon only displays if you have the appropriate privileges.

Figure 16–19 The Delete Announcement Icon on an Announcement



3. In the Delete Announcement dialog (Figure 16–20), click the **Delete** button to delete the announcement and close the dialog.

Figure 16–20 Delete Announcement Dialog



The selected announcement is removed from the Announcement Manager task flow, the Announcements task flow, and the Recent Activity list.

16.2.3 Working with the Announcements Task Flow

The Announcements task flow is essentially a viewer for convenient access to current announcements. More robust features, for such actions as creating and editing announcements, are offered in the Announcement Manager task flow (see Section 16.2.2). The Announcements task flow offers a small subset of those features.

By default, announcements in the Announcements task flow show announcement titles as links. But you can configure the task flow to display only announcement titles, titles with some amount of content, or only content. For more information, see Section 16.3, "Setting Announcements Service Task Flow Properties."

This section contains the following subsections:

- Section 16.2.3.1, "Viewing Announcements in the Announcements Task Flow"
- Section 16.2.3.2, "Sending Mail from an Announcement"
- Section 16.2.3.3, "Linking a WebCenter Object to an Announcement"

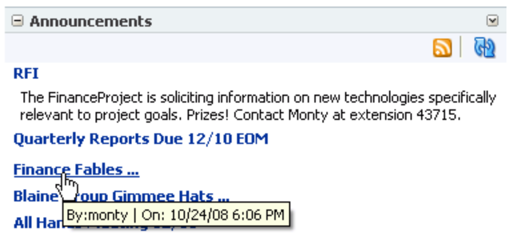
16.2.3.1 Viewing Announcements in the Announcements Task Flow

The Announcements task flow provides a read-only view of the announcements. Unlike the Announcement Manager task flow, you cannot create, edit, or delete announcements in this task flow.

To view announcements in an Announcements task flow:

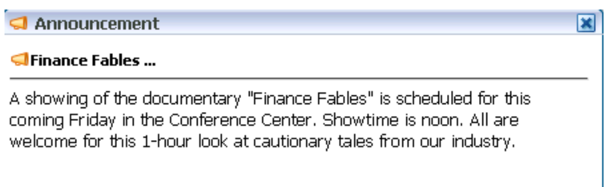
1. Log in to WebCenter, and go to the page that contains the **Announcements** task flow you want to view.
2. In the **Announcements** task flow, click the announcement you want to view (Figure 16–21).

Figure 16–21 The Announcements Task Flow



The announcement details display in the Announcement dialog (Figure 16–22). Unlike announcement content displayed in the Announcement Manager (as plain text), this dialog displays content with all the formatting that was applied to it

Figure 16–22 An Announcement Accessed from an Announcements Task Flow



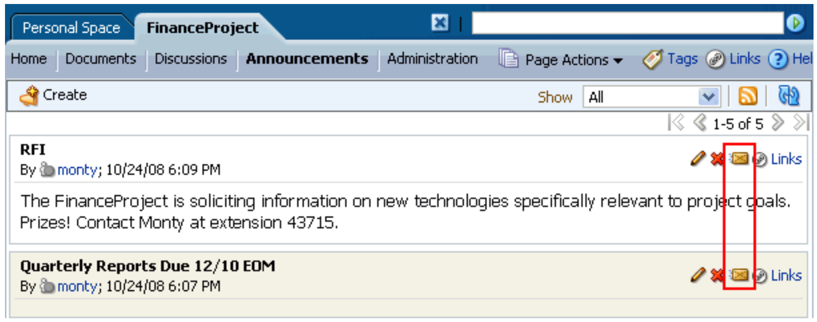
3. Click the **Close** button to exit the dialog.

16.2.3.2 Sending Mail from an Announcement

Each announcement in the Announcement Manager or Announcements task flow has an associated **Send Mail** icon in its toolbar (Figure 16–23). 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 **Send Mail** icon displays to all users accessing the Announcements task flow.

Figure 16–23 Send Mail Icons on Announcement Headers

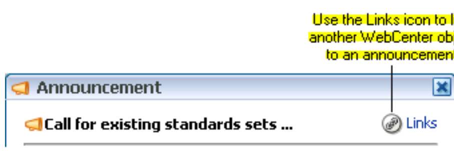


The WebCenter administrator determines the mail client to use with the **Send Mail** icon. If a local mail client was set, then a plain text message opens. If the WebCenter Mail service was set as the mail client, then the HTML Mail Compose dialog opens. With either mail client, you can add or edit the standard, prepopulated message before sending.

16.2.3.3 Linking a WebCenter Object to an Announcement

Each announcement in the Announcement Manager or Announcements task flow has an associated **Links** icon in its toolbar to link another WebCenter object to the announcement.

The **Links** icon displays to all users accessing the Announcements and Announcement Manager task flows, if the Links service is configured in the application.

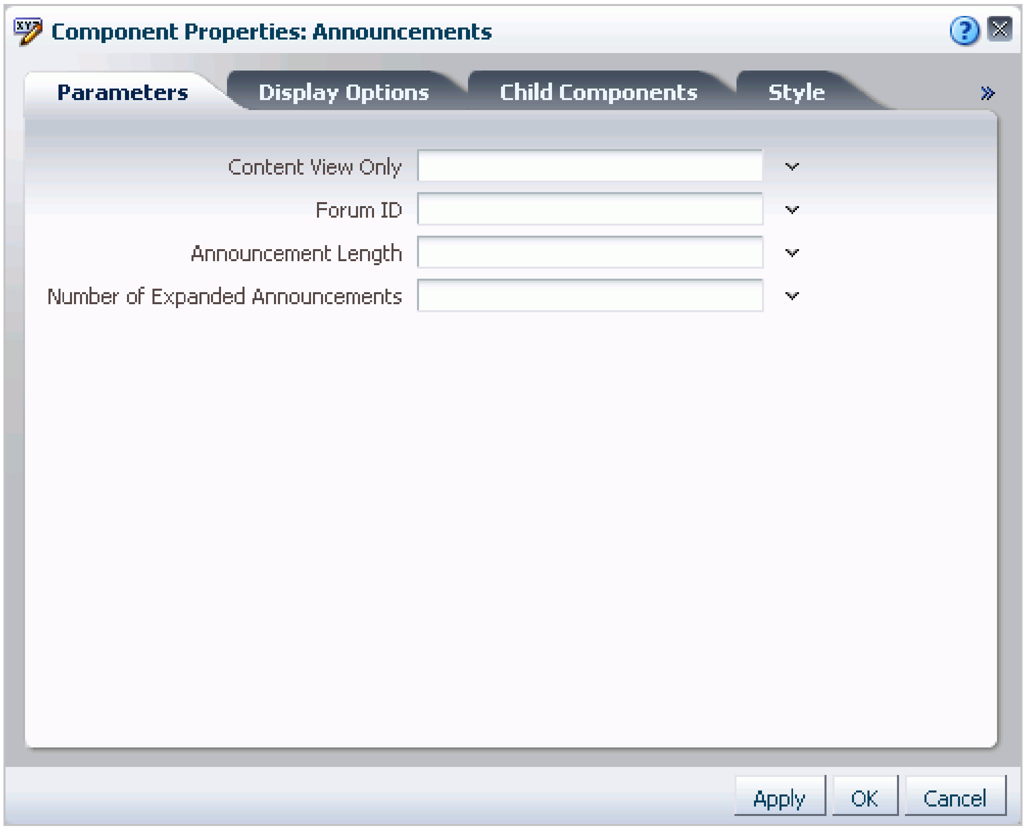


For more information, see Chapter 21, "Working with the Links Service."

16.3 Setting Announcements Service Task Flow Properties

The Announcements service task flows have associated properties, which users with sufficient privileges can access from the Component Properties dialog in Oracle Composer (Figure 16–24). Many properties are common to all task flows, and the method for accessing task flow properties is the same from task flow to task flow. Common task flow properties and how to access them are discussed in Section 10.4, "Setting Properties on Page Content."

Figure 16–24 Announcements Task Flow Component Properties



The properties on the **Parameters** tab of the Component Properties dialog control the default task flow content and facilitate the wiring of the task flow to page parameters and page definition variables. These properties are unique to the task flow type. For more information, see Section 10.4.3, "Working with Component Parameters." For information about wiring pages and components, see Chapter 11, "Wiring Pages, Task Flows, Portlets, and UI Components."

Changes to the properties on the **Display Options**, **Style**, and **Content Style** tabs affect the appearance and behavior of the task flow for all users. These properties are common to all task flows. For more information, see Section 10.4.4, "Working with Component Display Options" and Section 10.4.7, "Working with Style and Content Style Properties."

The content of the **Events** tab depends on the events supported by the task flow. For more information, see Section 10.4.8, "Working with Component Contextual Events."

The **Child Components** tab displays all of the components contained within the current component. It provides controls for rearranging, showing, and hiding child components. Not all components contain children. So you may find this tab devoid of content. For more information, see Section 10.4.6, "Working with Child Components."

All properties on the **Parameters** and **Display Options** tabs provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the **Edit** icon next to a property field to open the editor. For more information about using the editor and for descriptions of common EL expressions, see Section 10.4.5, "Using Expression Language (EL) Expressions with Component Properties."

Table 16–1 describes the properties that are unique to the Announcements task flows.

Table 16–1 Announcements Service Task Flow Properties: Parameter Tab

Property	Description	Task Flow
`Announcement Length`	The number of characters to show in announcement details. Use only when `Content View Only` is set to `false`. If no value is specified, then WebCenter displays 200 characters. This parameter takes effect with `Number of Expanded Announcements`. Express values using the following formats: ■ **Constant**—Express a constant value, such as `200` or `500`. ■ **Page parameter**—Enter a page parameter to grab the value from the page on which the task flow is placed. For more information, see Chapter 11, "Wiring Pages, Task Flows, Portlets, and UI Components." ■ **EL expression**—The default. Enter an Expression Language (EL) expression. The value you enter for `Announcement Length` is ignored if `Content View Only` is set to `true`.	Announcements
`Content View Only`	A Boolean value representing whether to remove the announcement title and display just the announcement content. Enter `true` to remove the title and `false` to render the title. When set to `true`, the values for `Announcement Length` and `Number of Expanded Announcements` are ignored.	Announcements
`Forum ID`	The ID of the forum under which announcements are created in the back-end discussions server. In WebCenter Spaces, this property is blank by default. However, internally it maps to the forum ID associated with the current group space. For personal spaces, global (system) announcements are returned. You can edit this property to specify a different forum ID.	■ Announcements ■ Announcement Manager
`Number of Expanded Announcements`	The number of announcements to display announcement details. Announcements exceeding this value display the announcement title only. Use only when `Content View Only` is set to `false`. Express values using the following formats: ■ **Constant**—Express a constant value, such as `2` or `5`. ■ **Page parameter**—Enter a page parameter to grab the value from the page on which the task flow is placed. For more information, see Chapter 11, "Wiring Pages, Task Flows, Portlets, and UI Components." ■ **EL expression**—The default. Enter an Expression Language (EL) expression.	Announcements

17

Working with the Discussions Service

This chapter describes how to use the features provided through the Discussions service. The Discussions service provides a means of creating and participating in text-based discussions with other members of a group space. Use Discussions service task flows to create forums, post questions, and search for answers. Discussion forums additionally provide the means to preserve and revisit discussions.

This chapter includes the following sections:

- Section 17.1, "What You Should Know About the Discussions Service"
- Section 17.2, "Working with Discussions Service Task Flows"
- Section 17.3, "Setting Discussions Service Task Flow Properties"

Audience

This chapter is intended for WebCenter Spaces users interested in viewing, creating, and managing discussions. Much of this information also applies to custom WebCenter applications, though it is written with WebCenter Spaces users in mind. (For information about custom WebCenter applications, see "Integrating the Discussions Service" in *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter*.)

Your application administrator has the authority to expose or hide task flows from a particular service. Tasks discussed in this chapter are not available to you if the relevant service is hidden.

17.1 What You Should Know About the Discussions Service

You can use the Discussions service to post, respond to, and preserve topical information in discussion forums scoped to group spaces or to entire applications. Users post topics to a discussion forum (Figure 17–1), and other users post information relevant to those topics (Figure 17–2). All of this information is preserved within the forum.

Figure 17–1 Discussion Forum Topics List

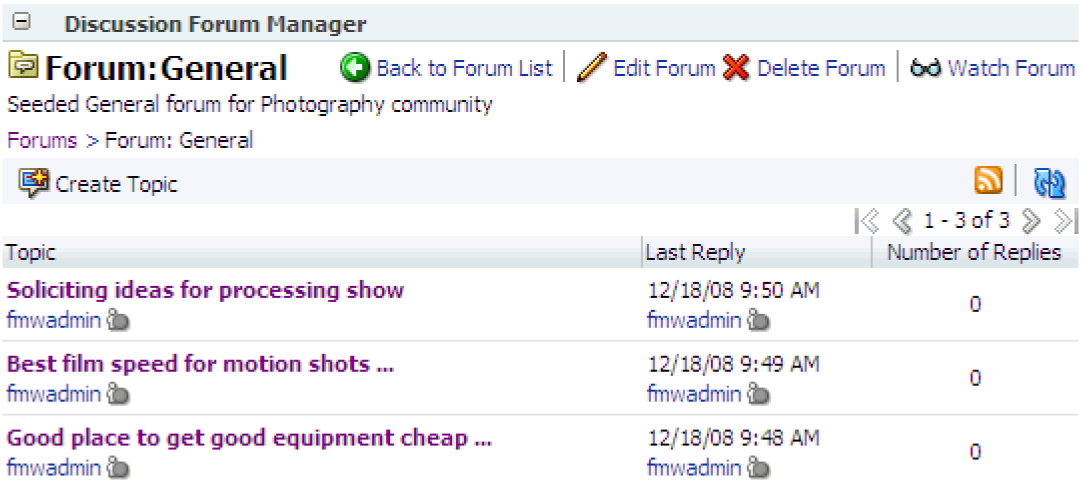
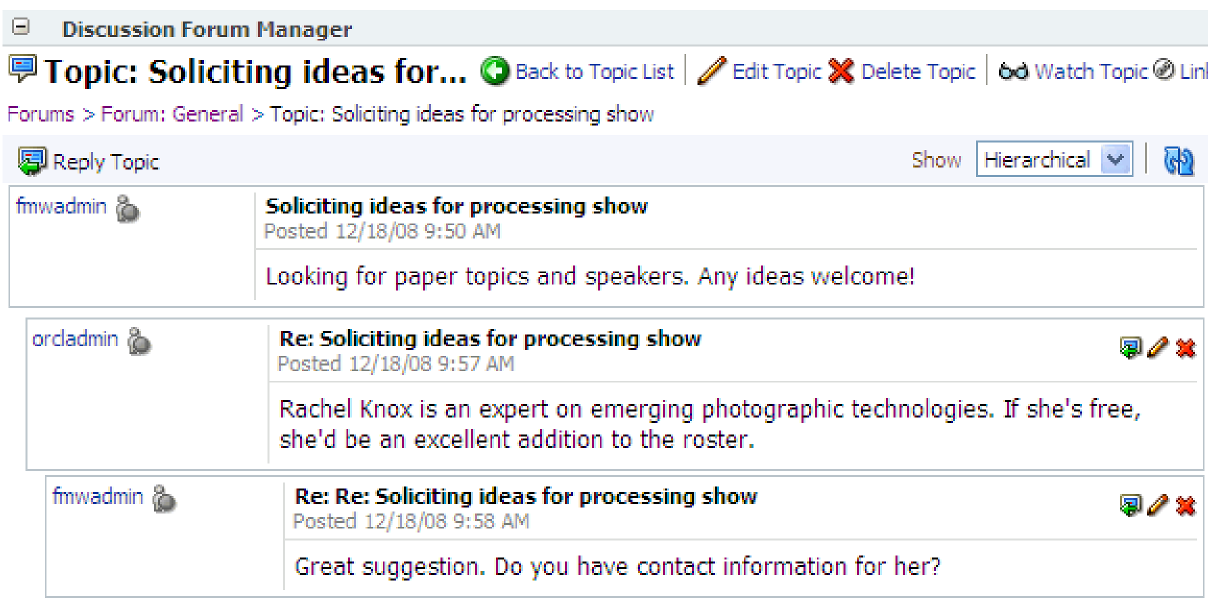


Figure 17–2 Posted Topic and Replies



The back-end server that provides the Discussion service manages content in a hierarchy. At the top of the hierarchy are *categories*, below that are *forums*, and then *topics*. Where categories are exposed in your WebCenter application, authorized users can create multiple forums within a given scope and multiple topics under those forums. Where categories are not exposed, authorized users can create multiple topics under one forum within a given scope.

Your WebCenter administrator controls whether users can create multiple forums or multiple topics under a single, provided forum.

In WebCenter Spaces, the Discussions service is scoped to group spaces. That is, you can create forums and topics only within the context of a group space. You can view and participate in discussions in both group spaces and personal spaces, depending on your application permissions.

Access to discussions is influenced by application security. The WebCenter Spaces application is, by default, a secure application. Users can access discussions according to the permissions they are granted by their specific user roles within a given group space.

Scoping additionally limits the users who can view and participate in discussions. For example, only members of the *Finance* group space can view discussions that transpire in *Finance* group space forums.

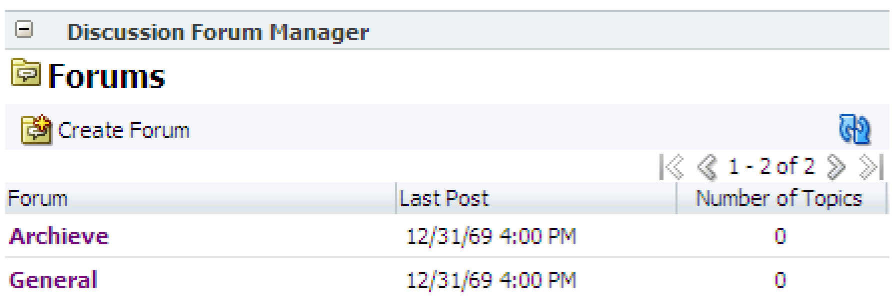
To expose a discussion forum to a specific set of users, you must add just those users as members of the group space where you hold the forum (for more information, see Section 13.12.2, "Granting WebCenter Spaces Users Access to a Group Space"). To open a discussion to all users, you must create a publicly-accessible group space (for more information, see Section 13.12.3, "Granting Public Access to a Group Space").

Most Discussions service task flows provide configuration settings for specifying which forum content to show. This is of particular use in personal spaces, which exist outside a specific group space scope (for more information, see Section 17.3, "Setting Discussions Service Task Flow Properties").

The Discussions service provides a wide variety of task flows for viewing and participating in discussions. These include:

- **Discussion Forum Manager** provides controls for creating discussion forums; creating, replying to, and managing discussion forum topics; and selecting watched forums and watched topics (Figure 17–3).

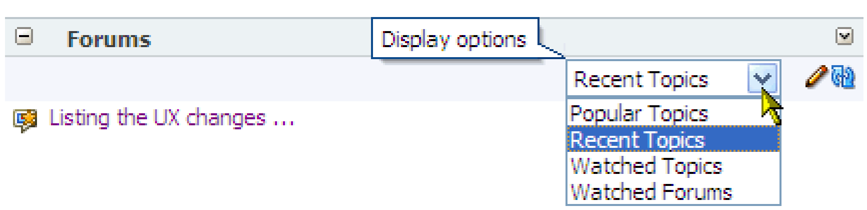
Figure 17–3 Discussion Forum Manager Task Flow



  In the WebCenter Spaces application, the Discussion Forum Manager task flow is additionally exposed on a **Discussions** page, provided by default in every group space. The Discussion Forum Manager task flow is available only to group spaces. You cannot add a Discussion Forum Manager to a personal space.

- **Forums**, in WebCenter Spaces, provides a means of accessing all possible views of a particular group space's discussions (Figure 17–4).

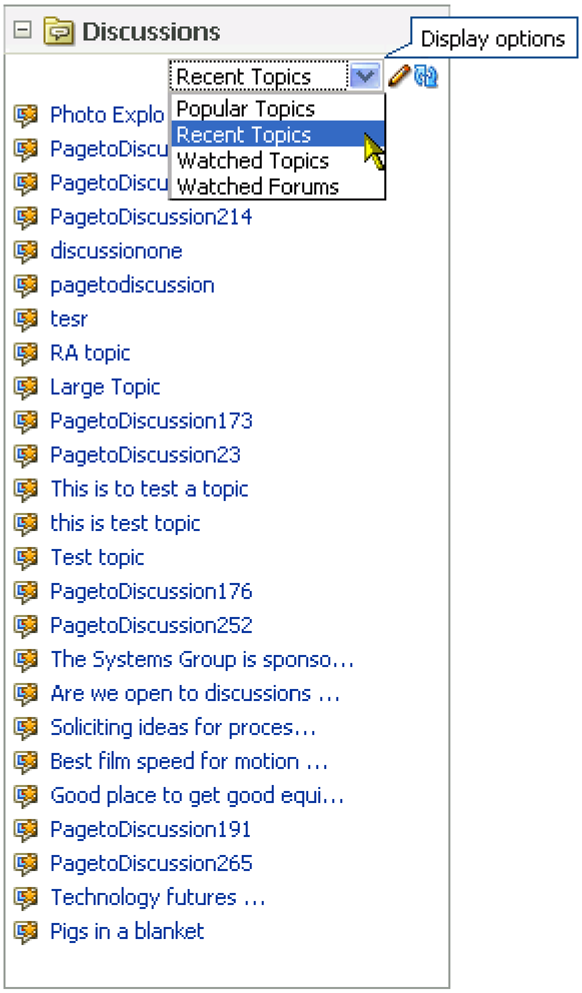
Figure 17–4 Forums Task Flow



Use the Forums task flow to view Recent Topics, Popular Topics, Watched Topics, and Watched Forums.

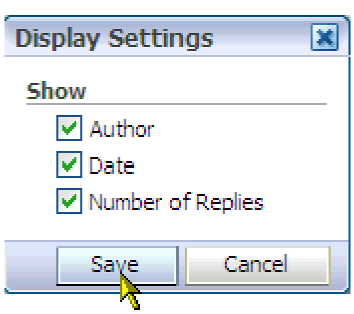
In WebCenter Spaces, the Forums task flow is additionally exposed as the Discussions panel in the Sidebar (Figure 17–5).

Figure 17–5 Discussions Panel in the WebCenter Spaces Sidebar



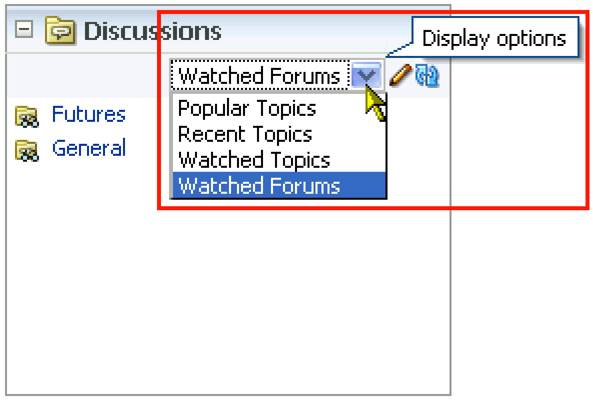
The Forums task flow also provides controls for determining the data to show in addition to the forum or topic title. Click the **Edit** icon in the task flow toolbar to open the Display Settings dialog (Figure 17–6).

Figure 17–6 Display Settings Dialog



Display Settings available for the Forums task flow and the Discussions panel in the WebCenter Spaces vary according to the option currently selected on the task flow **Display Options** menu (Figure 17–7).

Figure 17–7 Display Options Menu (WebCenter Spaces Sidebar)

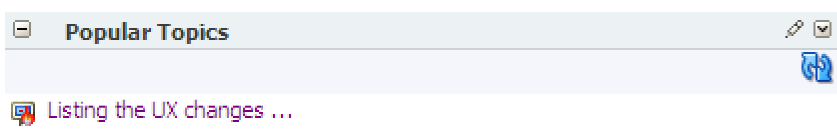


For example, when Recent Topics is selected on the menu, the Display Settings dialog offers the options **Author**, **Date**, and **Number of Replies**. When the task flow displays Watched Forums, the Display Settings dialog offers the options **Date** and **Number of Topics**.

The Forums task flow is available for placement on any application page, regardless of whether the page is scoped to a personal or group space.

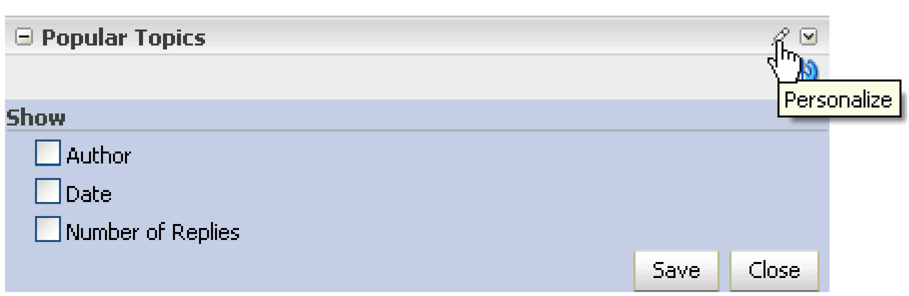
- **Popular Topics** (Figure 17–8) provides a look at the most frequently viewed discussion topics in all the discussion forums in a given group space.

Figure 17–8 Popular Topics Task Flow



The Popular Topics task flow also provides controls for determining the data to show in addition to the topic title. Click the **Personalize** icon in the task flow header to open a panel with controls for selecting the type of additional data to show (Figure 17–9).

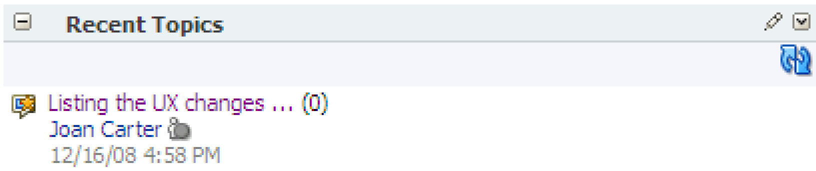
Figure 17–9 Show Panel in a Popular Topics Task Flow



The Popular Topics task flow is available for placement on any application page, regardless of whether the page is scoped to a personal or group space.

- **Recent Topics** (Figure 17–10) provides a look at the most recently accessed discussion topics in all the discussion forums in a given group space.

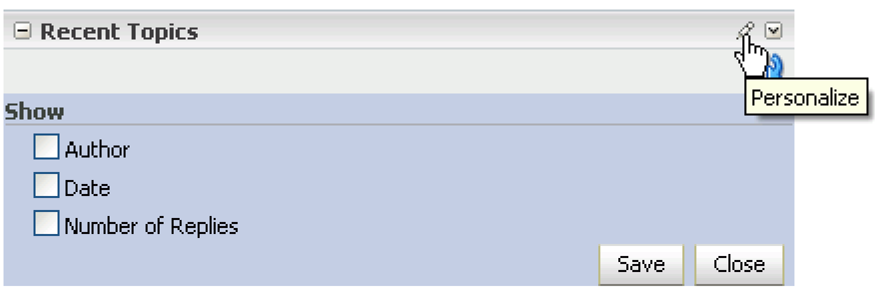
Figure 17–10 Recent Topics Task Flow



Access to group space discussion topics is restricted to those group spaces of which you are a member.

The Recent Topics task flow also provides controls for determining the data to show in addition to the topic title. Click the **Personalize** icon in the task flow header (Figure 17–11) to open a panel with controls for selecting the type of additional data to show.

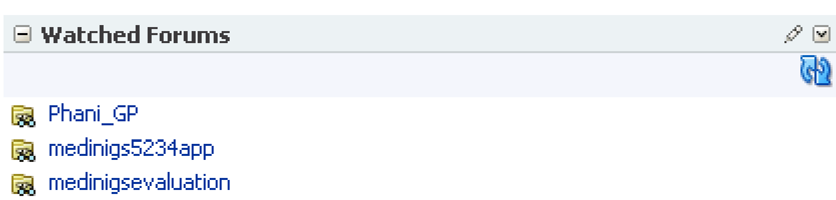
Figure 17–11 Show Panel in a Recent Topics Task Flow



The Recent Topics task flow is available for placement on any application page, regardless of whether the page is scoped to a personal or group space.

- **Watched Forums** (Figure 17–12) provides a means of viewing all discussion forums you have selected to watch from a particular group space or from all group spaces.

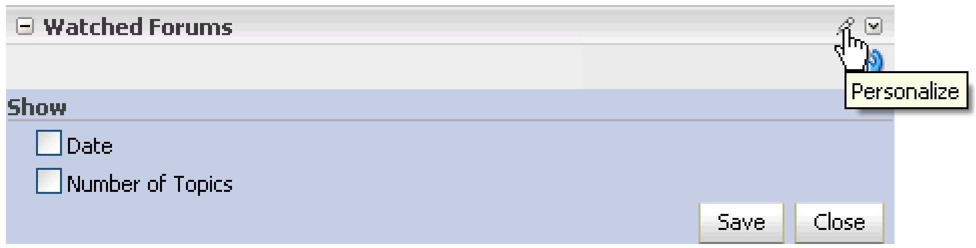
Figure 17–12 Watched Forums Task Flow



The Watched Forums task flow also provides controls for determining the data to show with the topic title. Click the **Personalize** icon in the task flow header

(Figure 17–13) to open a panel with controls for specifying the type of additional data to show. See Section 17.2.6, "Watching Forums and Topics."

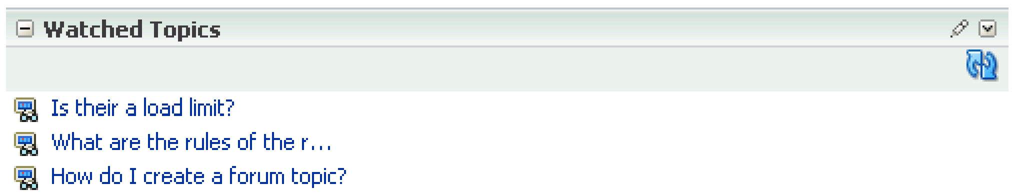
Figure 17–13 Show Panel in a Watched Forums Task Flow



The Watched Forums task flow is available for placement on any application page, regardless of whether the page is scoped to a personal or group space.

- **Watched Topics** (Figure 17–14) provides a cohesive view of all the topics you have selected to watch from a particular group space or from all group spaces.

Figure 17–14 Watched Topics Task Flow



The Watched Topics task flow also provides controls for determining the data to show with the topic title. Click the **Personalize** icon in the task flow header (Figure 17–15) to open a panel with controls for specifying the type of additional data to show. See Section 17.2.6, "Watching Forums and Topics."

Figure 17–15 Show Panel in a Watched Topics Task Flow

The Watched Topics task flow is available for placement on any application page, regardless of whether the page is scoped to a personal or group space.

Note: All instances of the Mail task flow in an application run against the same mail server and it serves no purpose to add multiple Mail task flow instances. This is true for all service task flows that require connections to back-end servers, for example, task flows from Announcements, Mail, and IMP services.

The Discussions service is tightly integrated with other WebCenter services, such as Links and Mail. For example, all mail sent to a group space distribution list can additionally be posted to that group space's default discussion forum. The group space moderator must select **Monitor Incoming Mail** in the group space settings for the Discussions service (see Section 14.3.4, "Publishing Group Space Mail in a Discussion Forum"). Every discussion topic provides the opportunity to link from the topic to another group space item, such as a document or an announcement. (For information about the Mail service, see Chapter 23, "Working with the Mail Service." For information about the Links service, see Chapter 21, "Working with the Links Service.")

17.2 Working with Discussions Service Task Flows

The Discussions service task flows expose all of the functionality available from the Discussions service. The Discussion Forum Manager is the most feature-rich task flow, providing controls for creating and managing discussion forums and posting and managing discussion topics and replies. The other task flows are useful windows into discussion forum content. They provide different views of the discussion forums and topics available to a particular group space or all group spaces.

Note: For information about configuring a Discussions service task flow to display the discussions from a particular group space or from all group spaces, see Section 17.3, "Setting Discussions Service Task Flow Properties."

Most of the subsections in this section describe tasks you can accomplish through the Discussion Forum Manager task flow. When you can use other task flows to perform the described actions, this is noted.

This section contains the following subsections:

- Section 17.2.1, "Adding a Discussions Service Task Flow to a Page"
- Section 17.2.2, "Creating a Discussion Forum"
- Section 17.2.3, "Editing the Forum Name and Description"
- Section 17.2.4, "Creating and Managing Forum Topics and Replies"
- Section 17.2.5, "Showing and Hiding Additional Discussion Forum Information"
- Section 17.2.6, "Watching Forums and Topics"
- Section 17.2.7, "Sending Mail from Discussion Topics"

17.2.1 Adding a Discussions Service Task Flow to a Page

For the steps to add a Discussions service task flow to a page, see Section 10.1.4, "Adding Task Flows to a Page."

17.2.2 Creating a Discussion Forum

Create discussion forums on the **Discussions** page or with the Discussion Forum Manager task flow.

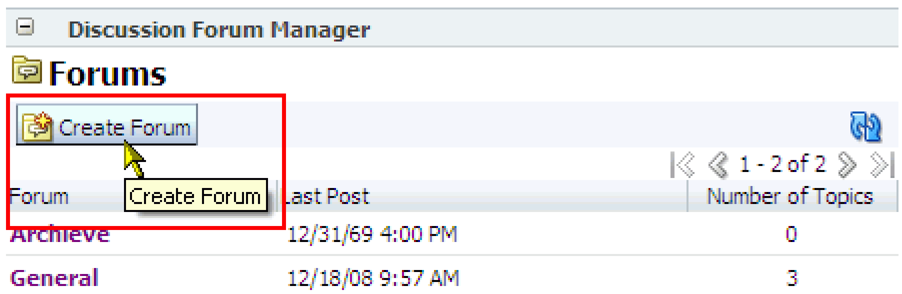
To create forums in WebCenter Spaces, you must be the group space moderator.

Note: Whether you can create multiple forums or topics under a single forum depends on what the application administrator specified on the template used to create the scope or on the Discussions service connection. For more information, see Section 17.1, "What You Should Know About the Discussions Service."

To create a discussion forum:

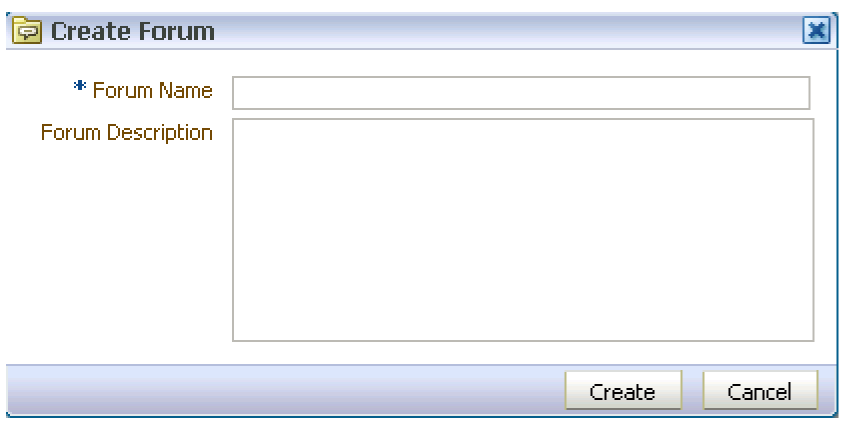
1. Log in, and go to the Discussion Forum Manager task flow in which to create a discussion forum.
2. Click the **Create Forum** button (Figure 17–16).

Figure 17–16 Create Forum Button



The Create Forum dialog opens (Figure 17–17).

Figure 17–17 The Create Forum Dialog



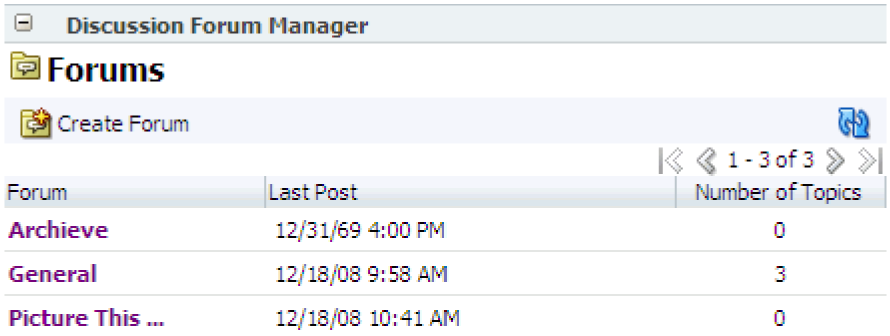
3. In the **Forum Name** field, enter a name for the discussion forum.

   Enter up to 255 characters.
4. Optionally, in the **Forum Description** text box, enter a description of the discussion forum.

   Enter up to 4000 characters.
5. Click **OK**.

   The new forum appears on the list of forums (Figure 17–18). Click a forum name to view forum content.

Figure 17–18 New Discussion Forum (Picture This)

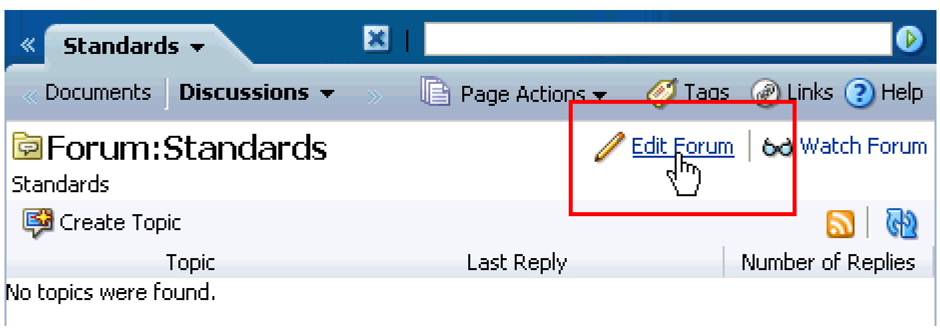


17.2.3 Editing the Forum Name and Description

To rename a discussion forum or revise its description:

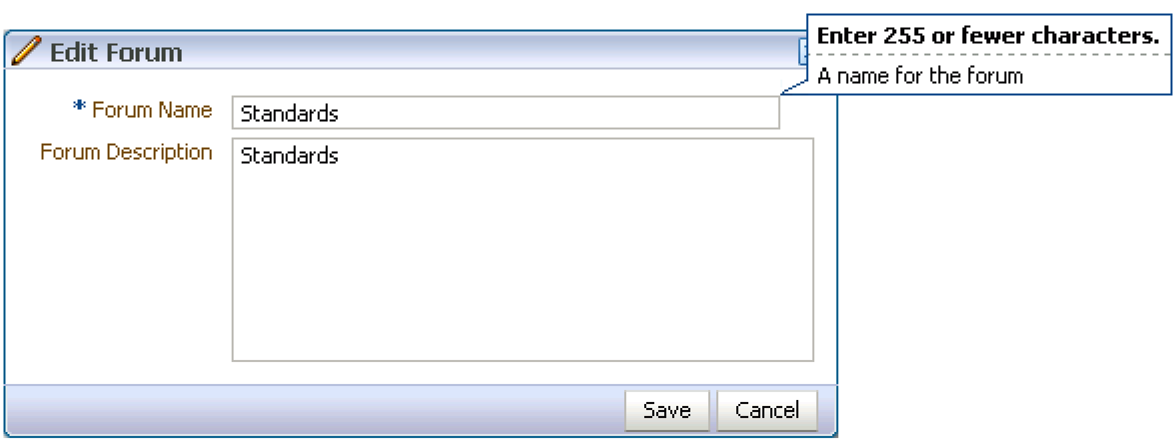
1. Log in, and go to the Discussion Forum Manager task flow in which to rename a discussion forum or revise its description.
2. Click the **Edit Forum** link (Figure 17–19).

Figure 17–19 Edit Forum Link



The Edit Forum dialog opens (Figure 17–20).

Figure 17–20 The Edit Forum Dialog



3. Optionally, in the **Forum Name** field enter a new name for the discussion forum.

   Enter up to 255 characters.

4. Optionally, in the **Forum Description** text box, revise the description of the discussion forum.

   Enter up to 4000 characters.

5. Click **OK**.

17.2.4 Creating and Managing Forum Topics and Replies

The life of a discussion forum takes place in its topics and replies. There users can ask questions, post information, exchange ideas, and otherwise communicate in interesting and useful ways.

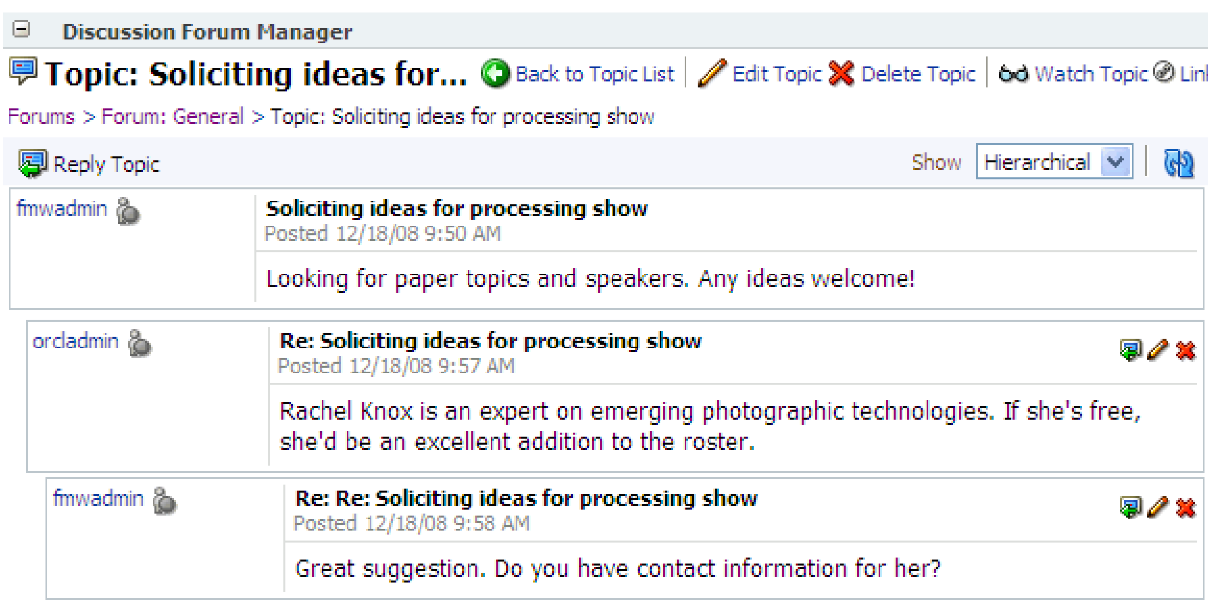
This section describes how to work with discussion forum topics and replies. It contains the following subsections:

- Section 17.2.4.1, "Posting a New Forum Topic"
- Section 17.2.4.2, "Replying to Topic Posts"
- Section 17.2.4.3, "Viewing Topic Posts and Replies"
- Section 17.2.4.4, "Editing Topics and Replies"
- Section 17.2.4.5, "Deleting Topic Posts and Replies"
- Section 17.2.4.6, "Switching Between Topic View Modes"

17.2.4.1 Posting a New Forum Topic

When you consider discussion forums hierarchically, the forum is the top container and forum topics are the next level down. Each posted topic additionally has subordinate replies, and the replies themselves may have replies (Figure 17–21).

Figure 17–21 A Posted Topic, a Reply, and a Reply to the Reply

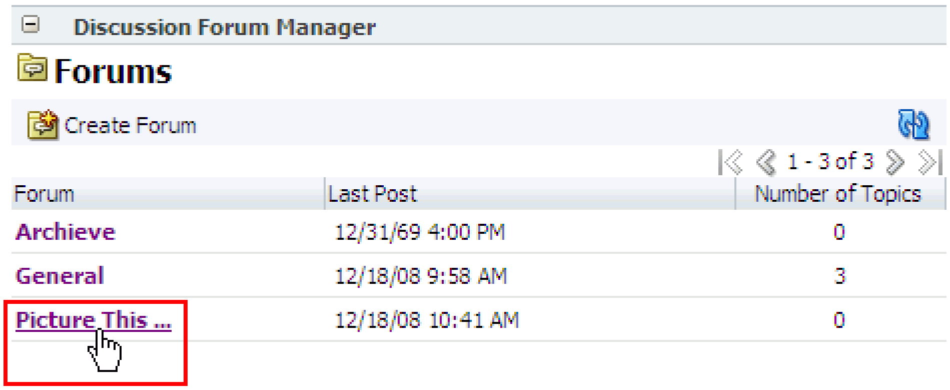


This section describes how to post forum topics using the Discussion Forum Manager task flow. For information about replying to a posted topic, see Section 17.2.4.2, "Replying to Topic Posts."

To post a topic under a discussion forum:

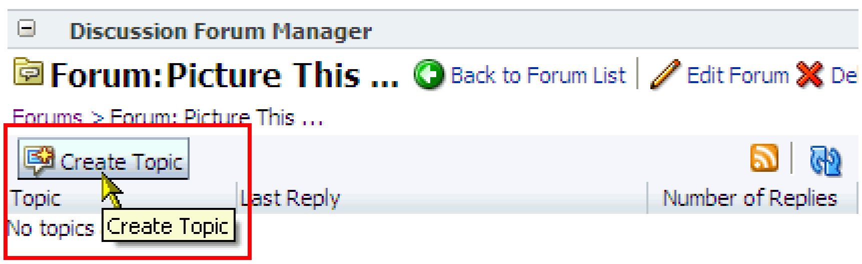
1. Log in, and go to the Discussion Forum Manager task flow in which to post a topic.
2. Click the forum under which to post a topic (Figure 17–22).

Figure 17–22 List of Discussion Forums in a Discussion Forum Manager Task Flow



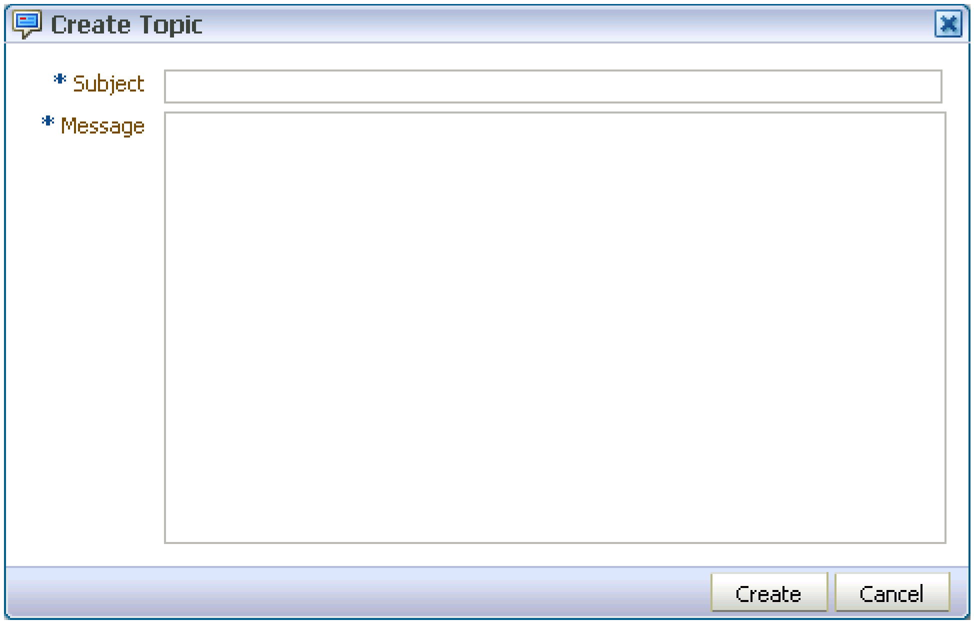
3. On the resulting screen, click the **Create Topic** button (Figure 17–23).

Figure 17–23 Create Topic Button



The Create Topic dialog opens (Figure 17–24).

Figure 17–24 The Create Topic Dialog



4. In the **Subject** field, enter the topic subject.

   Enter up to 255 characters.

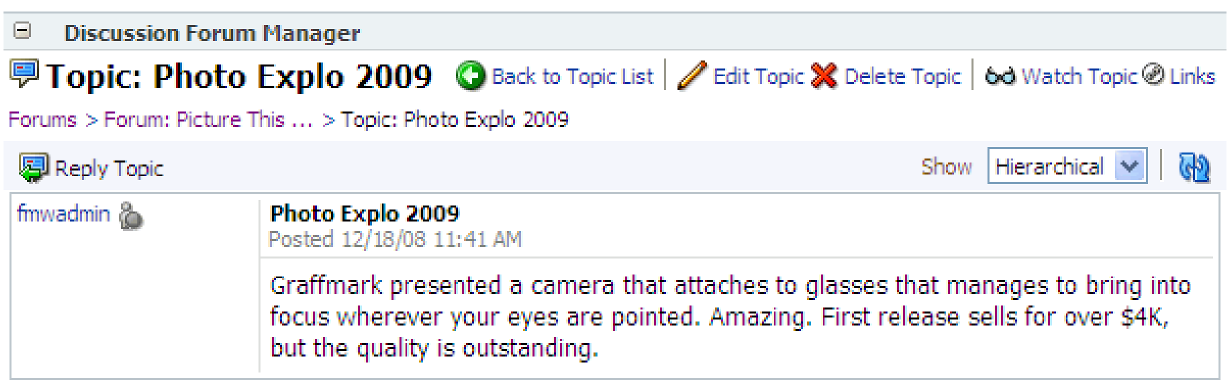
5. In the **Message** field, enter your post about the topic.

   Enter up to 4000 characters.

6. Click **Create**.

   The newly-posted topic appears under the selected forum in the Discussion Forum Manager (Figure 17–25).

Figure 17–25 A New Discussion Forum Topic



17.2.4.2 Replying to Topic Posts

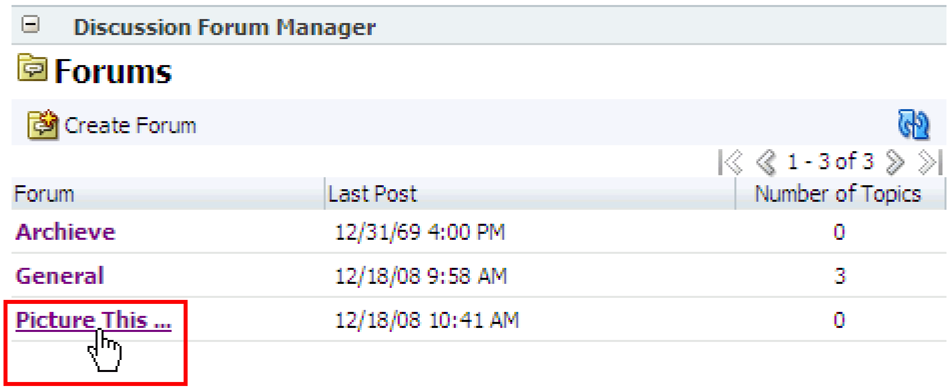
This section describes how to reply to topic posts through the Discussion Forum Manager, though you can reply to a topic post through any other Discussions service task flow.

By default, the Discussion Forum Manager task flow is exposed as the **Discussions** page in group spaces.

To reply to topic posts:

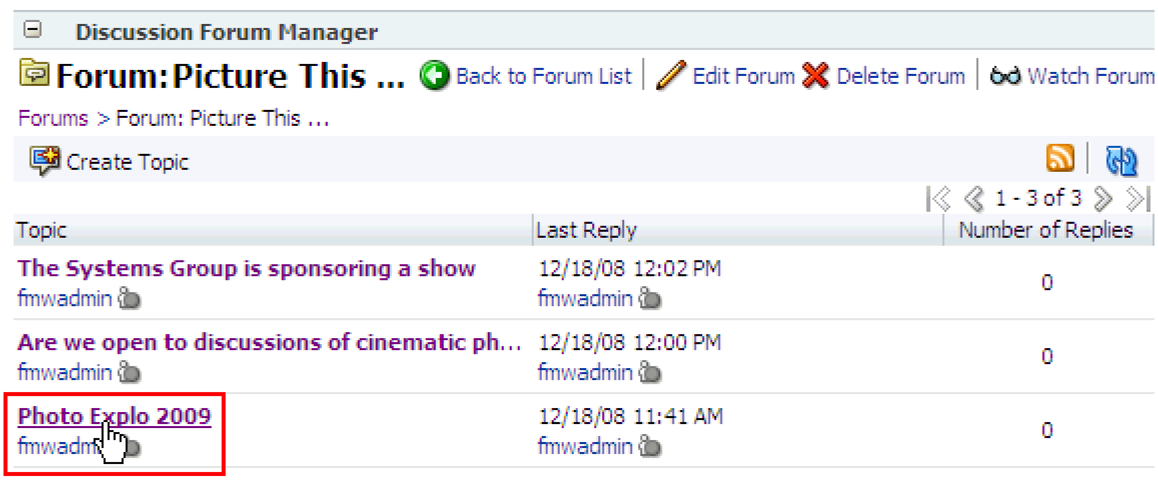
1. Log in, and go to the Discussion Forum Manager task flow in which to read and reply to topic posts.
2. Click the forum that contains the topic to which to reply (Figure 17–26).

Figure 17–26 List of Discussion Forums in a Discussion Forum Manager Task Flow



3. On the resulting page, click the relevant topic (Figure 17–27).

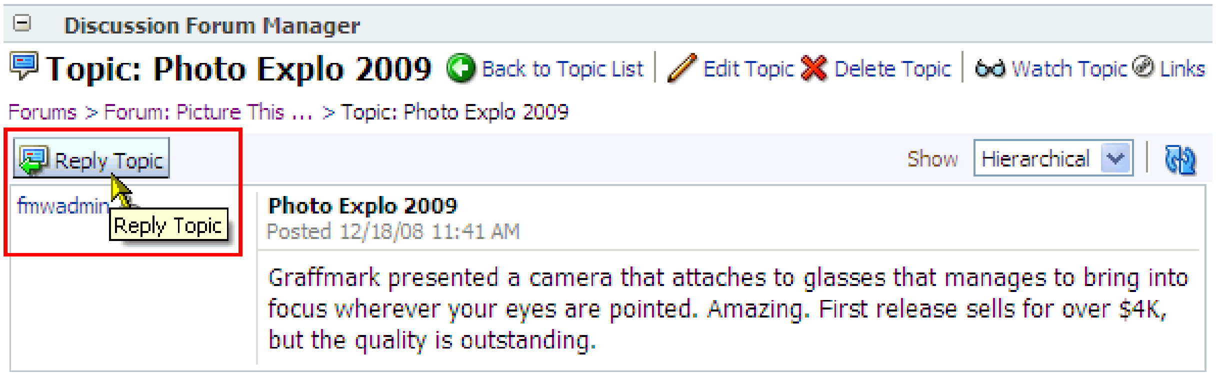
Figure 17–27 Discussion Forum Topic



The selected topic opens.

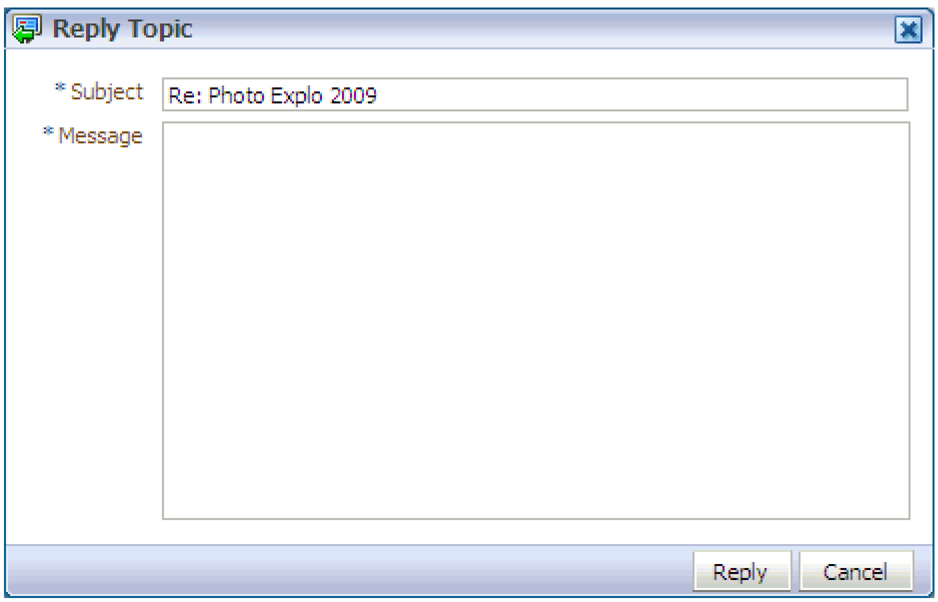
4. Click the **Reply Topic** button (Figure 17–28).

Figure 17–28 Reply Topic Button



The Reply Topic dialog opens (Figure 17–29).

Figure 17–29 The Reply Topic Dialog



5. In the **Subject** field, either leave the text as is or revise it.

   Enter up to 255 characters.

6. In the **Message** text box, enter your reply to the topic.

   Enter up to 4000 characters.

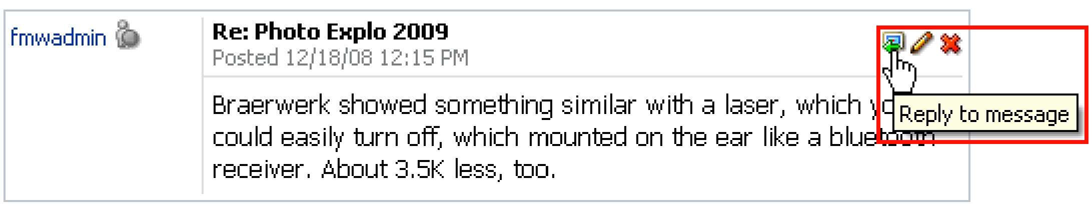
7. Click **Reply**.

   Your reply appears below the main topic post (Figure 17–30).

Figure 17–30 A Topic Post and a Reply

To post a reply to a reply, click the **Reply to message** icon (Figure 17–31) and follow the steps described in this section (starting with step 5).

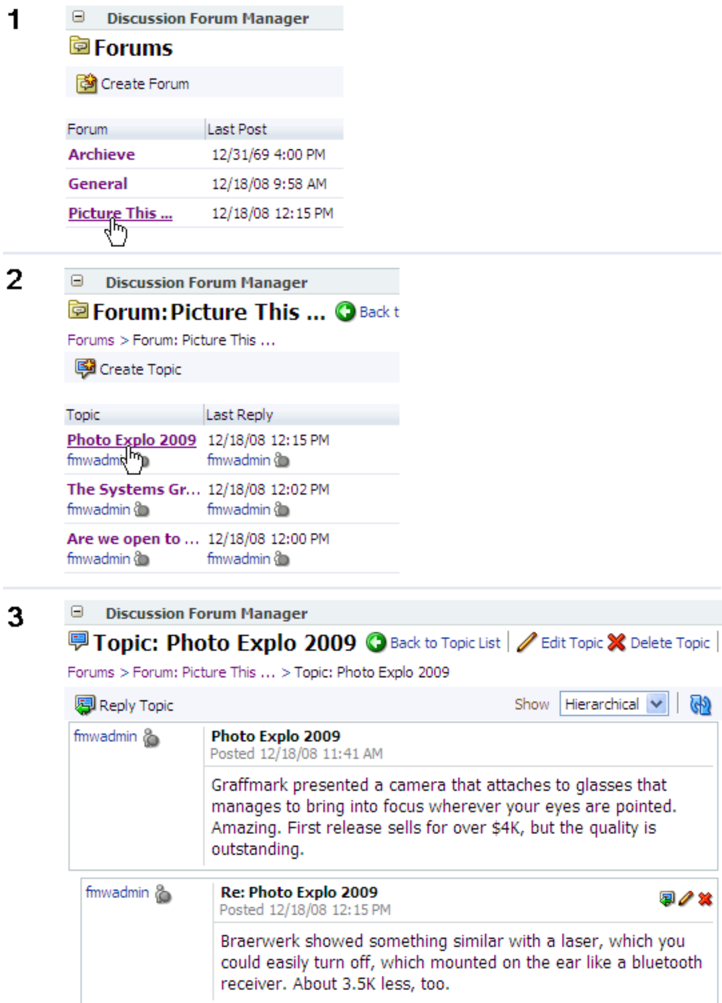
Figure 17–31 Reply to message Icon



17.2.4.3 Viewing Topic Posts and Replies

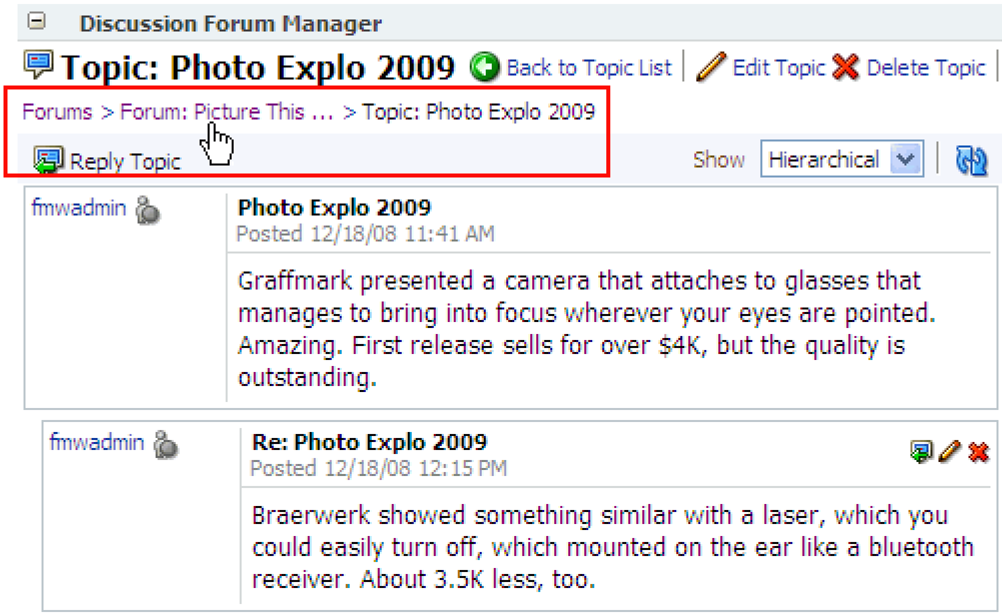
All discussion forum topics link to a screen that displays all of the replies posted to the topic. This is true for all Discussion service task flows. The amount of navigation required depends on which task flow you are using. For example, in both the Forums and Discussion Forum Manager task flows, first you select a forum (1), then a topic (2), then you view topic posts (3).

Figure 17–32 Accessing Topic Replies in the Discussion Forum Manager



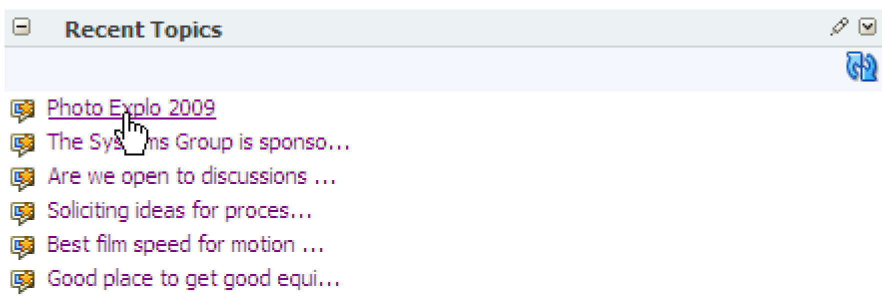
To navigate back up the forum hierarchy, click the breadcrumbs that display above the topic reply area (Figure 17–33).

Figure 17–33 Forum Breadcrumbs



With all the other Discussions service task flows, topics are listed up front, and viewing topic posts is a simple matter of clicking the relevant topic (Figure 17–34).

Figure 17–34 Forum Topics in the Recent Topics Task Flow



The topic content displays on a new screen (Figure 17–35).

Figure 17–35 Viewing a Recent Topic

To return to the task flow main view, click your browser **Back** button.

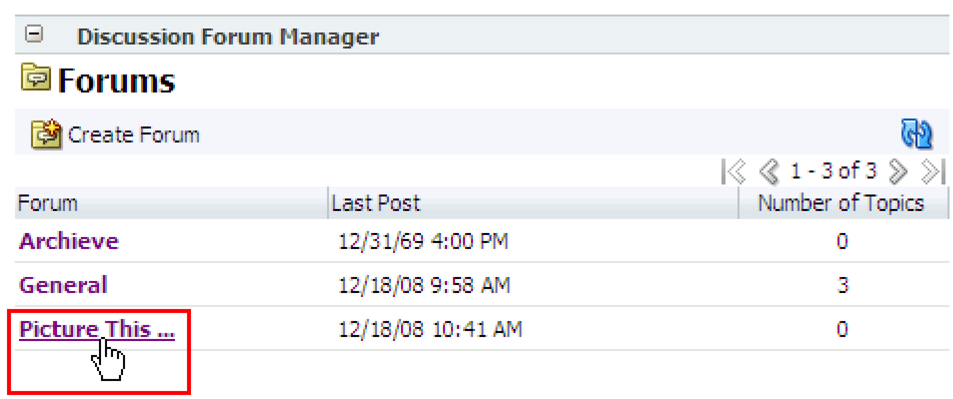
17.2.4.4 Editing Topics and Replies

Once you post a topic or a reply, you retain the option of returning to it and revising its content. Only you and group space moderators can edit your replies. This section describes how.

To edit a topic or a reply:

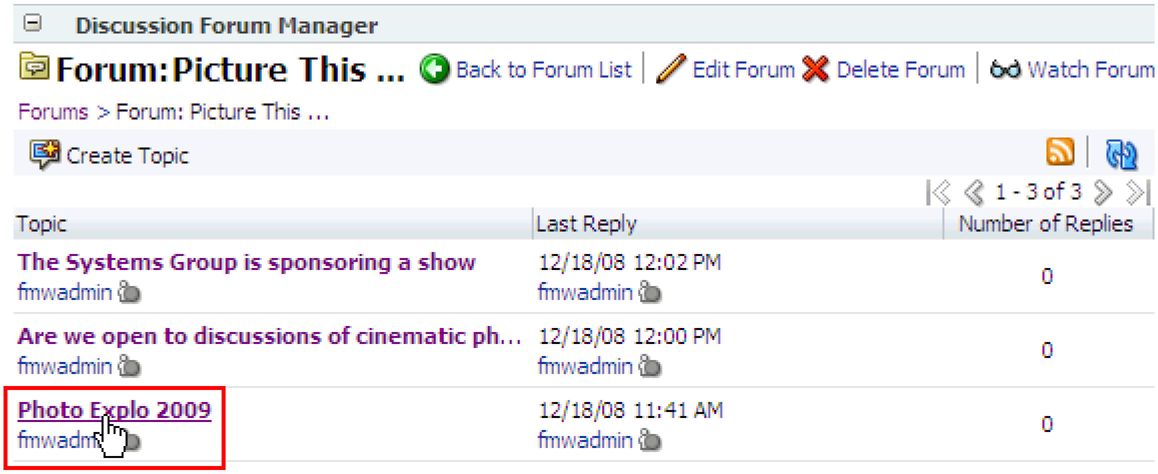
1. Log in, and go the Discussion Forum Manager task flow that displays the topic or reply you want to edit.
2. Click the forum that contains the topic or reply you want to edit (Figure 17–36).

Figure 17–36 List of Discussion Forums in a Discussion Forum Manager Task Flow



3. On the resulting page, click the relevant topic (Figure 17–37).

Figure 17–37 Discussion Forum Topic



The selected topic opens.

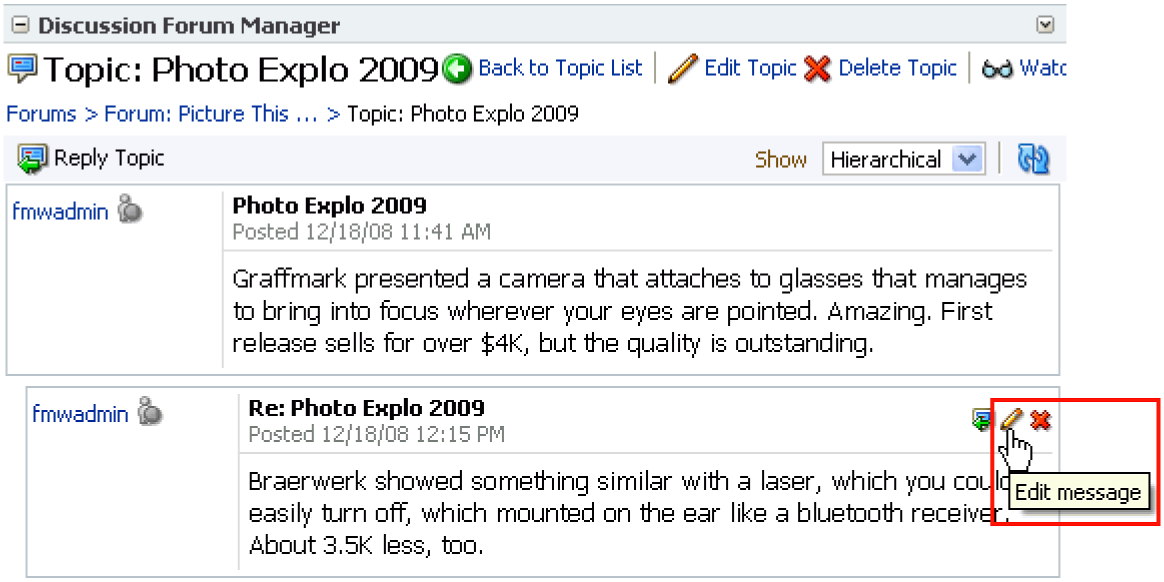
4. Your next step depends on whether you want to edit a topic or a reply:

   - To edit the topic, click the **Edit Topic** link at the top of the topic screen (Figure 17–38).

Figure 17–38 Edit Topic Link

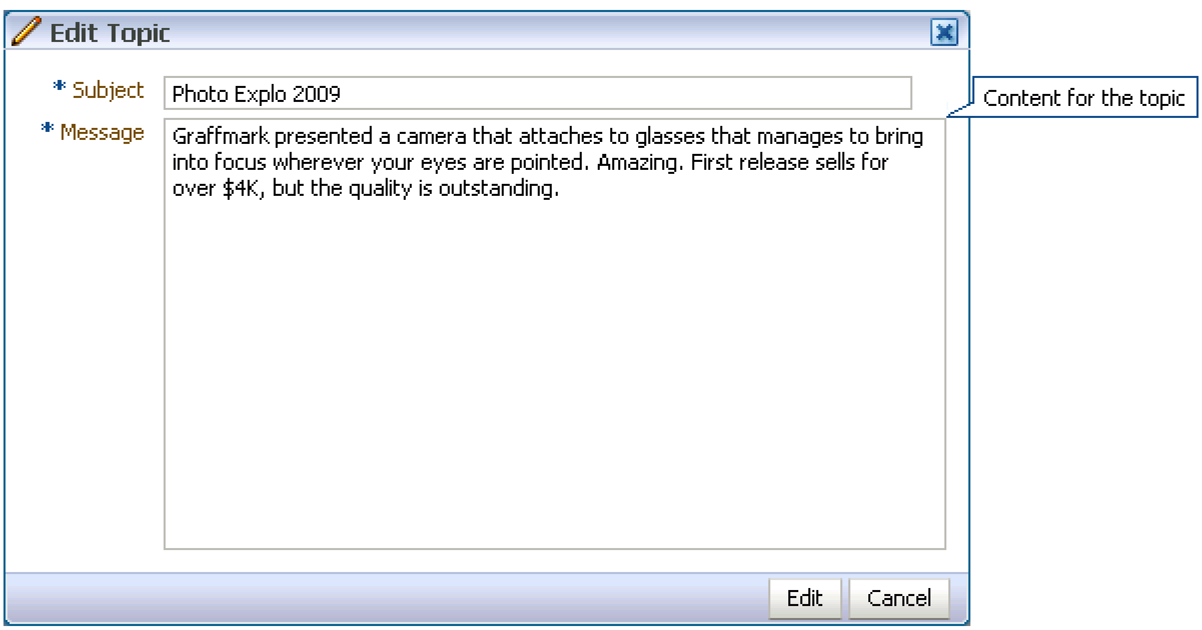
   - To edit a reply, click the **Edit message** icon associated with the reply (Figure 17–39).

Figure 17–39 Edit message Icon



The Edit Topic (or Edit Message) dialog opens (Figure 17–40).

Figure 17–40 The Edit Topic Dialog



5. Revise the topic (up to 255 characters) or reply (up to 4000 characters).
6. Click **Edit** in the Edit Topic dialog, or click **Reply** in the Edit Reply dialog.

   Your changes are posted to the forum.

17.2.4.5 Deleting Topic Posts and Replies

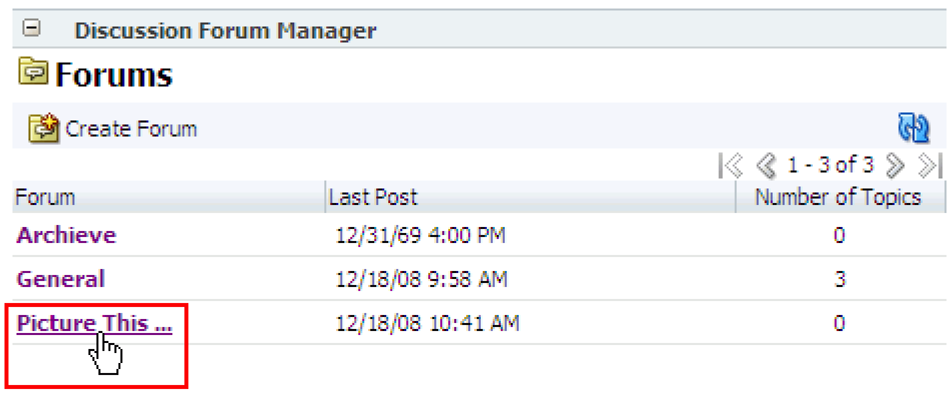
When you delete a topic, the original topic post and all of its subordinate replies are deleted. When you delete a reply, the original reply and all of its subordinate replies are deleted. Both actions involve very similar steps, which are described in this section.

Note: To delete a topic post or reply, you must have created it or you must have access equivalent to group space moderator.

To delete a topic or a reply:

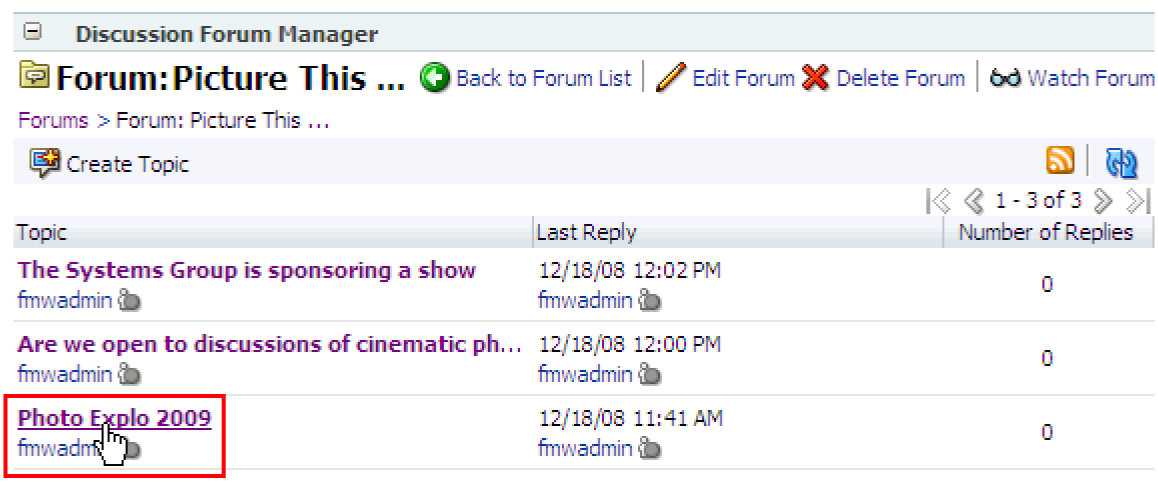
1. Log in, and go to the Discussion Forum Manager task flow that displays the topic or reply you want to delete.
2. Click the forum that contains the topic or reply you want to delete (Figure 17–41).

Figure 17–41 List of Discussion Forums in a Discussion Forum Manager Task Flow



3. On the resulting page, click the relevant topic (Figure 17–42).

Figure 17–42 Discussion Forum Topic



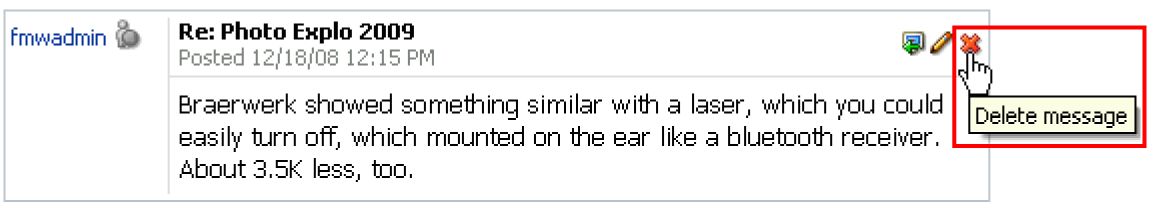
The selected topic opens.

4. Your next step depends on whether you want to delete a topic or a reply:
   - To delete a topic, click the **Delete Topic** link at the top of the topic screen (Figure 17–43).

Figure 17–43 Delete Topic Link

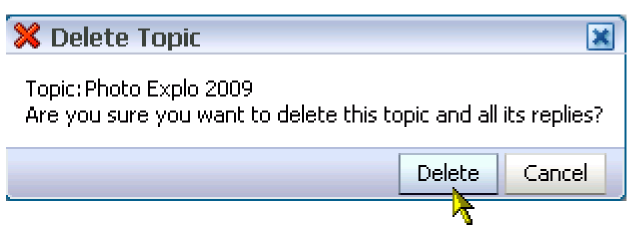
- To delete a reply, click the **Delete message** icon associated with the reply (Figure 17–44).

Figure 17–44 Delete Message Icon



A Delete confirmation dialog opens (Figure 17–45).

Figure 17–45 The Delete Confirmation Dialog



5. Click **Delete**.

The topic and all of its replies or the reply and all of its subordinate replies are deleted.

17.2.4.6 Switching Between Topic View Modes

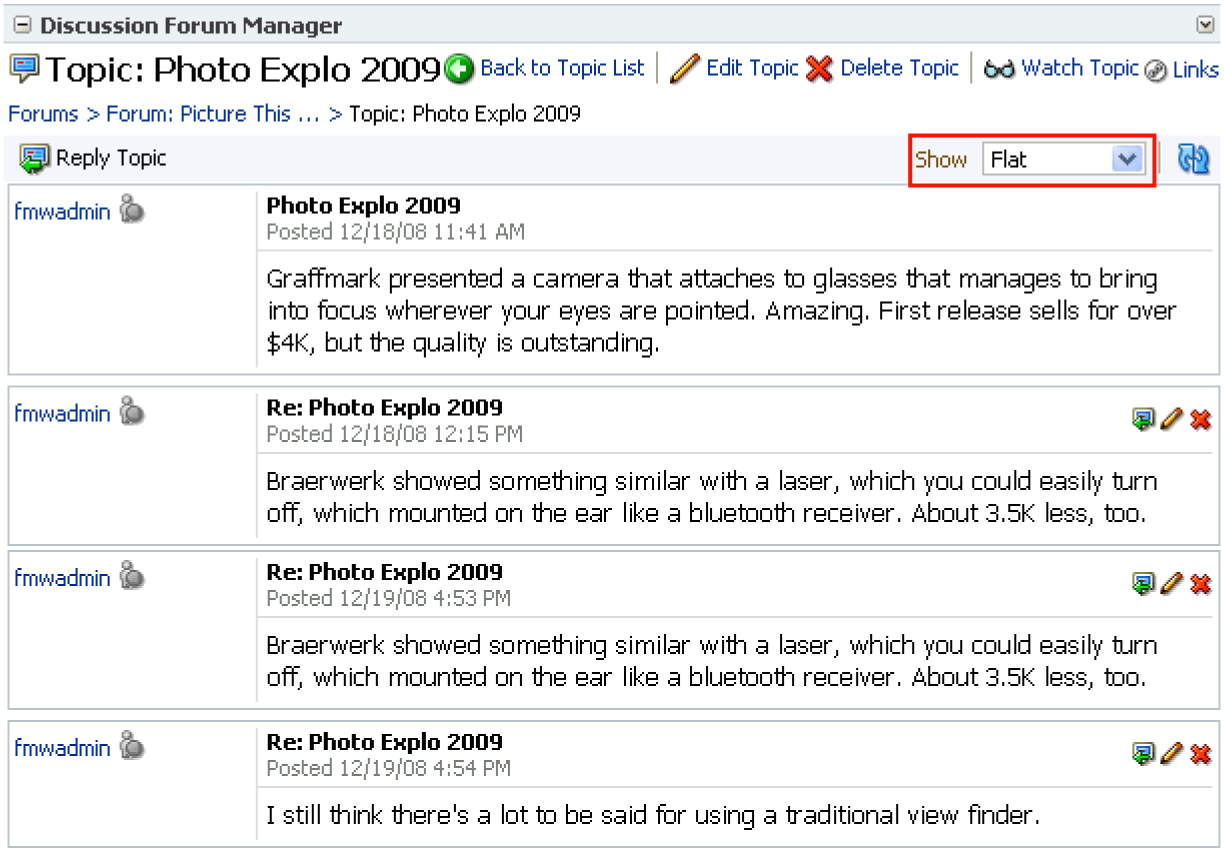
You have the option of viewing a topic and all of its replies in a hierarchical, indented mode or a flat, unindented mode. The hierarchical mode (Figure 17–46) uses indenting to indicate whether a reply is to the topic or to another reply.

Figure 17–46 Hierarchical View Mode

For example, in Figure 17–46 the first entry is the main topic, the second is a reply to the topic, the third is a reply to the reply, the fourth entry is a reply to the topic.

The flat mode (Figure 17–47) makes no such distinctions.

Figure 17–47 Flat View Mode

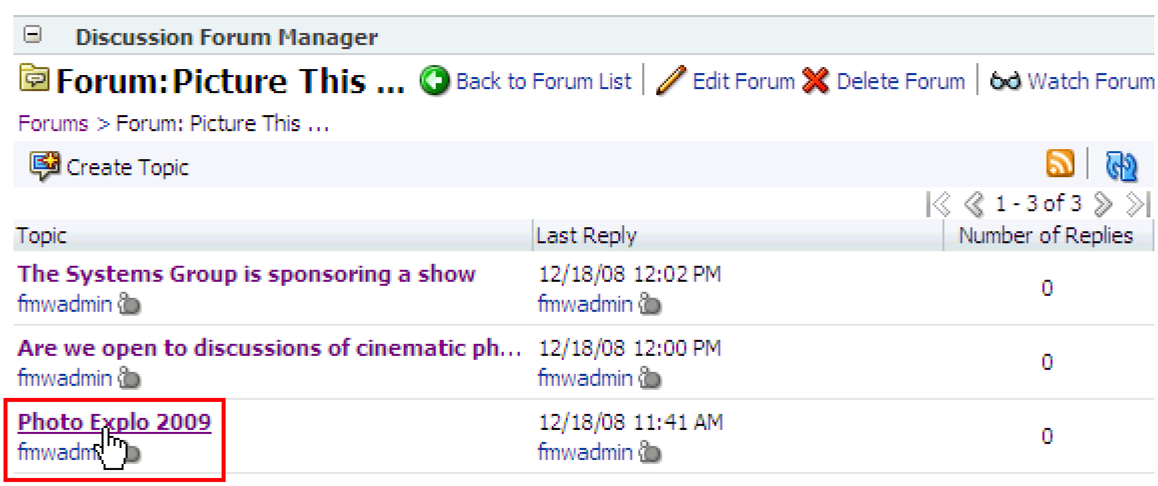


All Discussion task flows that show topics and replies in the same screen provide view mode options.

To switch between topic view modes:

1. Log in, and go to the Discussions task flow that contains the topic you want to view.
2. Click to open the topic you want to view (Figure 17–48).

Figure 17–48 Discussion Forum Topic



3. From the **Show** dropdown list, select either **Flat** or **Hierarchical** (Figure 17–49).

Figure 17–49 Show Dropdown List

The topic view rerenders according to your selection.

17.2.5 Showing and Hiding Additional Discussion Forum Information

Most discussions task flows provide personalization settings for determining information to show in addition to the forum or topic title (the Discussion Forum Manager does not provide such settings). Additional information can include forum or topic author, creation date, and number of replies or topics.

How you set these display settings is personal, affecting only your view of a task flow instance. How you access these display settings varies slightly from task flow to task flow.

This section describes how to configure display settings for Discussions service task flows. It contains the following subsections:

- Section 17.2.5.1, "Showing or Hiding Information in the Forums Task Flow"
- Section 17.2.5.2, "Showing or Hiding Information in the Popular Topics Task Flow"
- Section 17.2.5.3, "Showing or Hiding Information in the Recent Topics Task Flow"
- Section 17.2.5.4, "Showing or Hiding Information in the Watched Forums Task Flow"

- Section 17.2.5.5, "Showing or Hiding Information in the Watched Topics Task Flow"

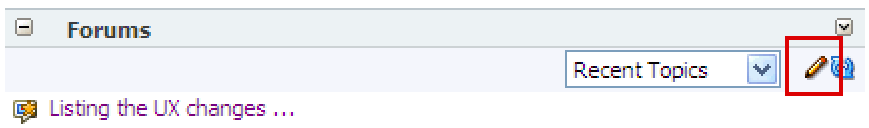
17.2.5.1 Showing or Hiding Information in the Forums Task Flow

In WebCenter Spaces, the Forums task flow is additionally exposed as the Discussions panel in the Sidebar. The display settings available to the Forums task flow are the same display settings available to the Discussions panel. Use the procedure described in this section to set display settings for both.

To show or hide additional information in the Forums task flow:

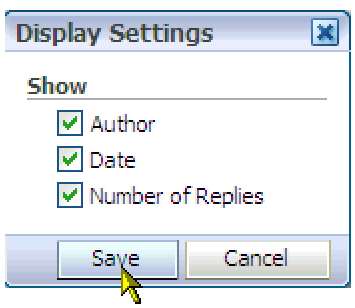
1. Go to the Forums task flow where you want to configure display settings.
2. Click the **Select the data to display** icon in the task flow toolbar (Figure 17–50).

Figure 17–50 Select the data to display Icon in the Forums Task Flow



The Display Settings dialog opens (Figure 17–51).

Figure 17–51 Display Settings Dialog



3. Select the data you want to show, or clear the checkbox of data you want to hide.

   Choose or clear one or more from:

   - **Author**—The user name of the person who created the forum or topic
   - **Date**—The date the forum or topic was last updated
   - **Number of Replies**—The number of replies associated with the topic (for Watched Forums, this displays number of topics)

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

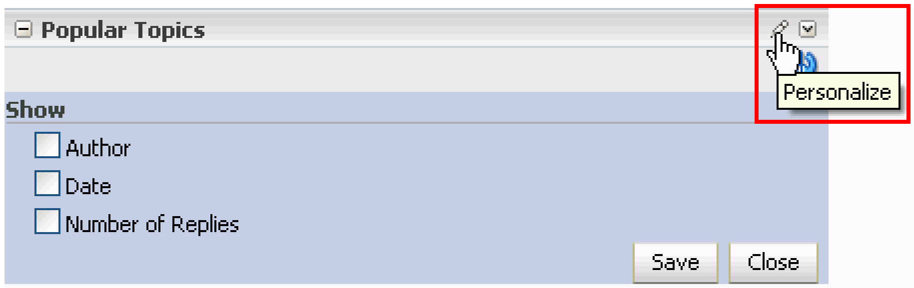
17.2.5.2 Showing or Hiding Information in the Popular Topics Task Flow

To show or hide additional information in the Popular Topics task flow:

1. Log in, and go to the Popular Topics task flow where you want to show or hide additional information.
2. Click the **Personalize** icon in the task flow header.

   This opens a panel where you can select or clear additional data (Figure 17–52).

Figure 17–52 Show Panel in a Popular Topics Task Flow



3. Select the data you want to show, or clear the checkbox of data you want to hide.

   Choose or clear one or more from:

   - **Author**—The user name of the person who posted the topic
   - **Date**—The date the topic was last updated
   - **Number of Replies**—The number of replies associated with the topic

4. Click **Save** to save your changes and close the panel.

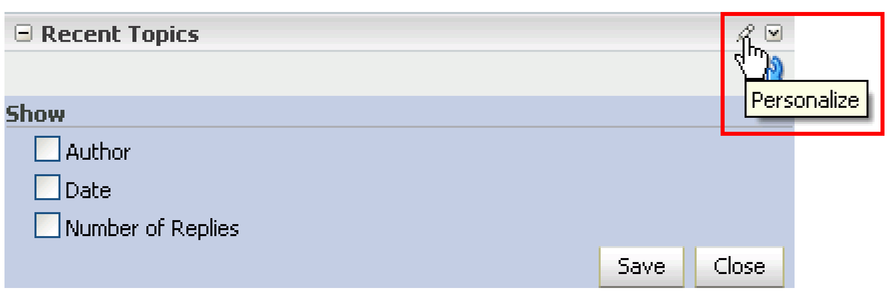
17.2.5.3 Showing or Hiding Information in the Recent Topics Task Flow

To show or hide additional information in the Recent Topics task flow:

1. Go to the Recent Topics task flow where you want to show or hide additional information.
2. Click the **Personalize** icon in the task flow header.

   This opens a panel where you can select or clear additional data (Figure 17–53).

Figure 17–53 Show Panel in a Recent Topics Task Flow



3. Select the data you want to show, or clear the checkbox of data you want to hide.

   Choose or clear one or more from:

   - **Author**—The user name of the person who posted the topic
   - **Date**—The date the topic was last updated
   - **Number of Replies**—The number of replies associated with the topic

4. Click **Save** to save your changes and close the panel.

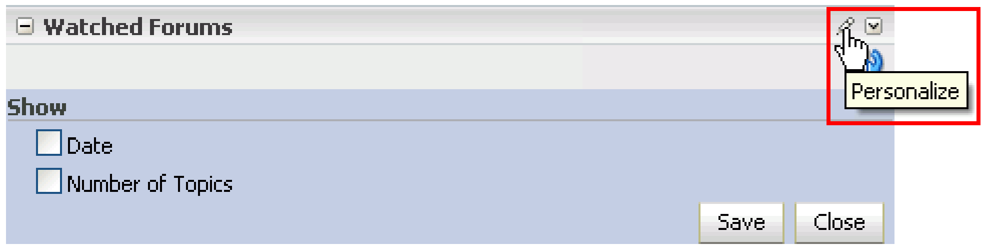
17.2.5.4 Showing or Hiding Information in the Watched Forums Task Flow

To show or hide additional information in the Watched Forums task flow:

1. Go to the Watched Forums task flow where you want to show or hide additional information.
2. Click the **Personalize** icon in the task flow header.

   This opens a panel where you can select or clear additional data (Figure 17–54).

Figure 17–54 Show Panel in a Watched Forums Task Flow



3. Select the data you want to show, or clear the checkbox of the data you want to hide.

   Choose or clear one or more from:

   - **Date**—The date the forum was last updated
   - **Number of Topics**—The number of topics associated with the forum
4. Click **Save** to save your changes and close the panel.

17.2.5.5 Showing or Hiding Information in the Watched Topics Task Flow

To show or hide additional information in the Watched Topics task flow:

1. Go to the Watched Topics task flow where you want to show or hide additional information.
2. Click the **Personalize** icon in the task flow header.

   This opens a panel where you can select or clear additional data (Figure 17–55).

Figure 17–55 Show Panel in a Watched Topics Task Flow

3. Select the data you want to show, or clear the checkbox of the data you want to hide.

   Choose or clear one or more from:

   - **Author**—The user name of the person who posted the topic
   - **Date**—The date the topic was last updated
   - **Number of Replies**—The number of replies associated with the topic

4. Click **Save** to save your changes and close the panel.

17.2.6 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 your efforts. The forums and topics you select to watch are personal, in that your selections appear on your view of watch lists. No other user is affected by the forums and topics you choose to watch.

When a user places a watch on 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, the user receives a mail notification.

In WebCenter Spaces, all watched forums and topics are accessible from the Discussions panel in the Sidebar. All watched forums and topics are accessible from the Forums task flow. The Watched Forums and Watched Topics task flows provide more focussed views of watched forums or watched topics.

This section includes information about how to add, view, and manage watched topics and forums. It contains the following subsections:

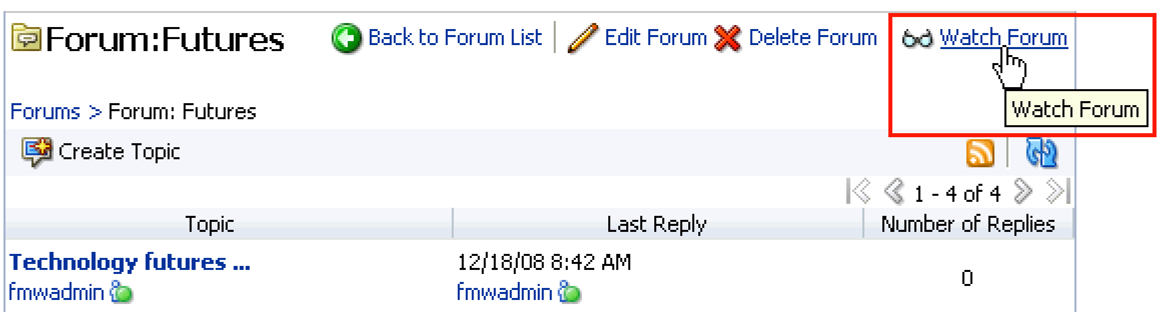
- Section 17.2.6.1, "Adding a Discussion Forum or Topic to Your Watch List"
- Section 17.2.6.2, "Removing a Discussion Forum or Topic from a Watch List"
- Section 17.2.6.3, "Viewing Watched Forums and Topics from the Sidebar"

17.2.6.1 Adding a Discussion Forum or Topic to Your Watch List

To add a discussion forum or topic to your watch list:

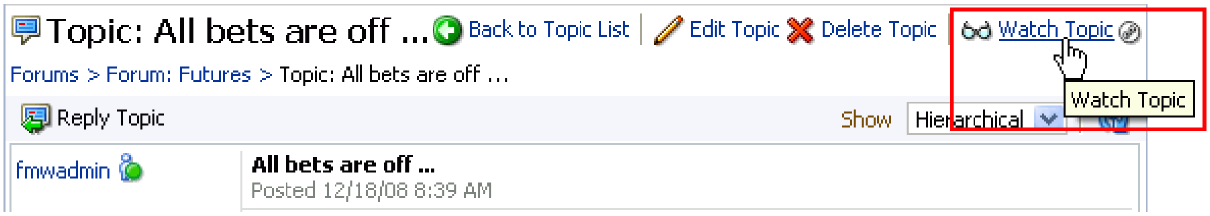
1. Log in, and go to the discussion forum or topic you want to add to your watch list.
2. The next step depends on whether you want to watch a forum or a topic:
   - To watch a forum, click the **Watch Forum** link at the top of the forum (Figure 17–56).

Figure 17–56 Watch Forum Link on the Futures Discussion Forum



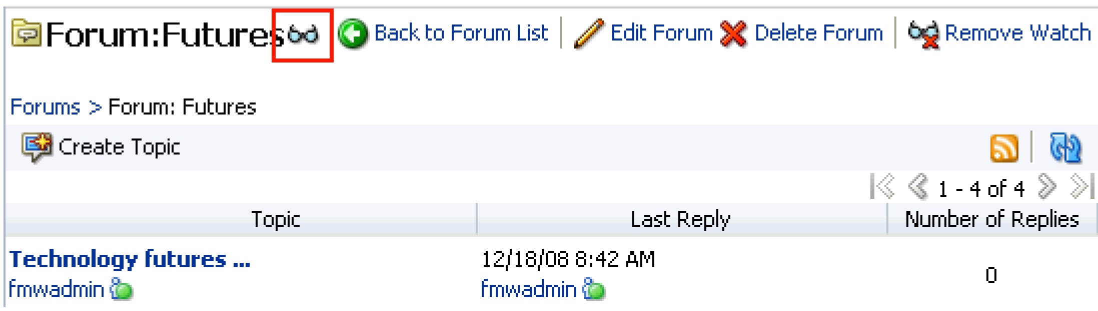
   - To watch a topic, click the **Watch Topic** link at the top of the topic (Figure 17–57).

Figure 17–57 Watch Topic Link on the Topic All Bets Are Off



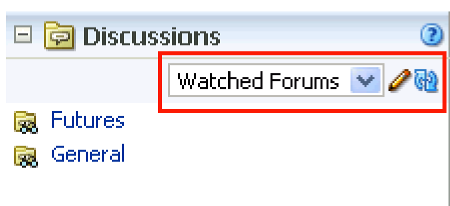
The **Watched** icon appears next to the forum or topic name (Figure 17–58).

Figure 17–58 The Watched Icon



And the watched forum or topic is listed on all Watched Forums or Watched Topics lists, for example, on the Discussions panel in the WebCenter Spaces Sidebar (Figure 17–59) and in Watched Forums and Watched Topics task flows.

Figure 17–59 Watched Forums on the Discussions Panel in the Sidebar

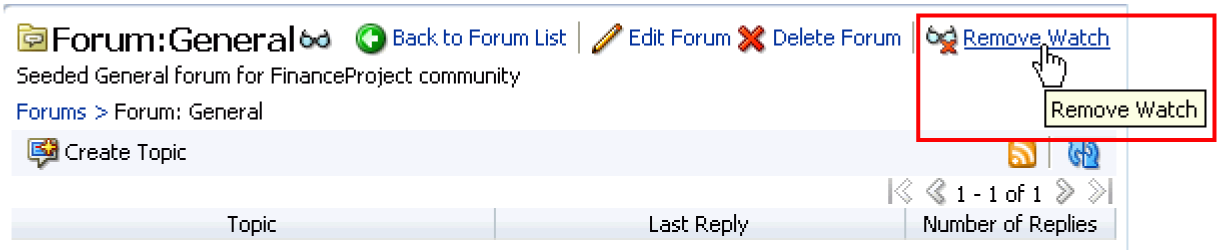


17.2.6.2 Removing a Discussion Forum or Topic from a Watch List

To remove a discussion forum or a discussion topic from your watch list:

1. Log in, and go to the discussion forum or topic you want to remove from your watch list.
2. Click the **Remove Watch** link on the discussion forum or topic (Figure 17–60).

Figure 17–60 The Remove Watch Link



The selected item is removed from your forum or topic watch list.

17.2.6.3 Viewing Watched Forums and Topics from the Sidebar

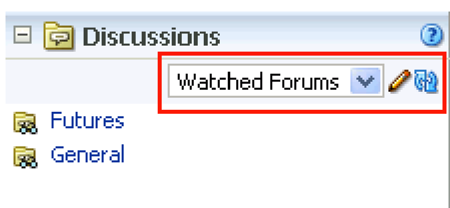
To view a watched forum or topic from the WebCenter Spaces Sidebar:

1. Log in to WebCenter, and in the Sidebar, expand the **Discussions** panel or click the **Discussions** icon (Figure 17–61).

Figure 17–61 The Sidebar Discussions Icon

2. Set the panel display option to Watched Forums or Watched Topics (Figure 17–62).

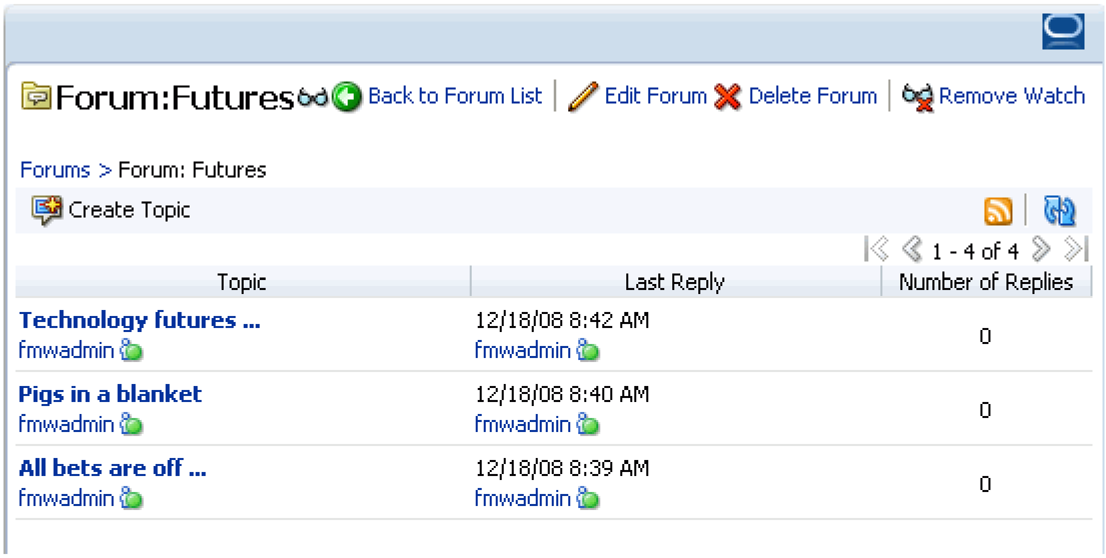
Figure 17–62 Watched Forums on the Discussions Panel in the Sidebar



3. Click the link to the discussion forum or forum topic you want to view.

   The forum or topic opens (Figure 17–63).

Figure 17–63 A Watched Forum Opened from the Sidebar



17.2.7 Sending Mail from Discussion Topics

Each discussion topic in has an associated **Send Mail** icon in its toolbar (Figure 17–64). 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.

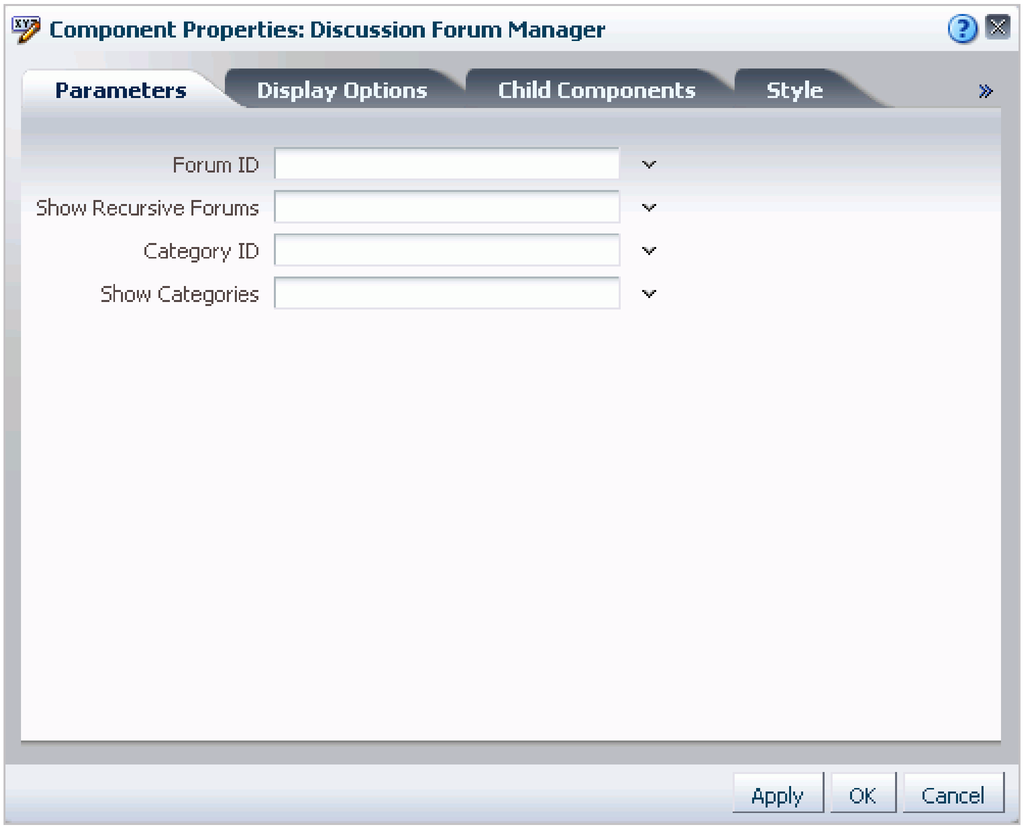
Figure 17–64 Send Mail Icons on Discussion Topics

The WebCenter administrator determines the mail client to use with the **Send Mail** icon. If a local mail client was set, then a plain text message opens. If the WebCenter 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.

17.3 Setting Discussions Service Task Flow Properties

The Discussions service task flows have associated properties, which users with sufficient privileges can access through the Component Properties dialog in Oracle Composer (Figure 17–65). Many properties are common to all task flows, and the method for accessing task flow properties is the same from task flow to task flow. Common task flow properties and how to access them are discussed in Section 10.4, "Setting Properties on Page Content."

Figure 17–65 Discussion Forum Manager Task Flow Component Properties



The properties on the **Parameters** tab of the Component Properties dialog control the default task flow content and facilitate the wiring of the task flow to page parameters and page definition variables. These properties are unique to the task flow type. For more information, see Section 10.4.3, "Working with Component Parameters." For information about wiring pages and components, see Chapter 11, "Wiring Pages, Task Flows, Portlets, and UI Components."

Changes to the properties on the **Display Options**, **Style**, and **Content Style** tabs affect the appearance and behavior of the task flow for all users. These properties are common to all task flows. For more information, see Section 10.4.4, "Working with Component Display Options" and Section 10.4.7, "Working with Style and Content Style Properties."

The content of the **Events** tab depends on the events supported by the task flow. For more information, see Section 10.4.8, "Working with Component Contextual Events."

The **Child Components** tab displays all of the components contained within the current component. It provides controls for rearranging, showing, and hiding child components. Not all components contain children. So you may find this tab devoid of content. For more information, see Section 10.4.6, "Working with Child Components."

All properties on the **Parameters** and **Display Options** tabs provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the **Edit** icon next to a property field to open the editor. For more information about using the editor and for descriptions of common EL expressions, see Section 10.4.5, "Using Expression Language (EL) Expressions with Component Properties."

Table 17–1 describes the properties that are unique to the Discussions task flows.

Table 17–1 Discussions Service Task Flow Properties: Parameters Tab

Property	Description	Task Flow
`Category ID`	On the discussions server, the category ID under which a given set of forums is managed For the Discussion Forum Manager task flow, use this parameter to specify the set of forums to present. For all other discussions task flows, use this parameter to specify the parent ID of the topics to show by default. If omitted, the value defaults to the Category ID associated with the current group space. In personal spaces, it takes the root Category ID. Use the following EL expression to return the Category ID of a named group space: `#{sessionContext['oracle.webcenter.collab.forum'].groupInfo['`*`groupSpaceName`*`'].categoryId}` Enter the group space name in lieu of the variable *`groupSpaceName`*. The group space name is available on the General tab of the group space **Settings** page.	■ Discussion Forum Manager ■ Forums ■ Popular Topics ■ Recent Topics ■ Watched Forums ■ Watched Topics
`Forum ID`	On the discussions server, the identifier under which topics are managed Use this parameter to identify the default forum to show in the task flow. Use the following EL expression to return the forum ID of a named group space: `#{sessionContext['oracle.webcenter.collab.forum'].groupInfo['`*`groupSpaceName`*`'].forumId}` Enter the group space name in lieu of the variable *`groupSpaceName`*. The group space name is available on the **General** tab of the group space **Settings** page.	■ Discussion Forum Manager ■ Popular Topics ■ Recent Topics ■ Watched Topics
`Hide Toolbar`	A means of showing or hiding the task flow personalization feature (see Section 17.2.5, "Showing and Hiding Additional Discussion Forum Information") ■ `true` means you want to hide the task flow personalization feature available. ■ `false` means you want to show the task flow personalization feature. `false` is the default value.	■ Popular Topics ■ Recent Topics ■ Watched Forums ■ Watched Topics
`Show Categories`	A means of showing the forums grouped under the `Category ID` category or the topics specified under the `Forum ID` forum. ■ `true` means the task flow displays the forums classified under `Category ID`. ■ `false` means the task flow displays the topics associated with the specified `Forum ID`, and navigation to a forums list view is not available.	Discussion Forum Manager
`Show Recursive Forums`	A means of specifying whether all forums under a given category/subcategory are shown or only a category's direct child forums are shown ■ `true` means all forums under a given category/subcategory are shown. `true` impacts performance. ■ `false` means only the category's direct child forums are shown. This is the default value.	Discussion Forum Manager

18

Working with the Documents Service

Oracle WebCenter enables content integration through:

- The Documents service, which enables end users to view and manage documents and other types of content in your organization's content repositories.

  The Documents service includes the *Content Presenter* task flow, which enables end users to select content in a variety of ways and then display those items using available display templates.

- Content repository data controls, which enable read-only access to a content repository, and maintain tight control over the way the content displays in a custom WebCenter application.

This chapter describes how to work with the Documents service and task flows at runtime in WebCenter applications. For more information about managing and including content in your WebCenter applications, see:

- "Integrating Content" in *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter* to configure content repository connections that provide access to decentralized content, and learn how to create custom display templates to integrate and publish decentralized content in your WebCenter application using Content Presenter, as well as how to use Java Content Repository (JCR) controls to enable read-only access to a content repository.
- "Integrating the Documents Service" in *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter* to integrate the Documents service in custom WebCenter applications at design time to provide end users with a user-friendly interface to manage, display, and search documents at runtime.
- "Managing Content Repositories" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter* to configure and manage content repositories used by WebCenter applications.

The following sections provide information about the Documents service and its task flows at runtime and in Oracle Composer. It contains the following sections:

- Section 18.1, "What You Should Know About the Documents Service"
- Section 18.2, "Working with Microsoft Office Integration"
- Section 18.3, "Working with Windows Explorer Integration"
- Section 18.4, "Working with the Documents Service Task Flows"
- Section 18.5, "Personalizing and Customizing Documents Service Task Flows"
- Section 18.6, "Setting Documents Service Task Flow Properties"

Audience

This chapter is intended for WebCenter Spaces users interested in viewing, creating, and managing task flows available through the Documents service. Much of this information also applies to custom WebCenter applications, though it is written with WebCenter Spaces users in mind. (For information about custom WebCenter applications, see "Integrating the Documents Service" in *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter*.)

Your application administrator has the authority to expose or hide task flows from a particular service. Tasks discussed in this chapter are not available to you if the relevant service is hidden.

18.1 What You Should Know About the Documents Service

The Documents service provides features for accessing, adding, and managing files and folders; configuring file and folder properties; searching file and folder content in your organization's content repositories; and displaying content from a content repository on a page in a predefined template using the Content Presenter task flow.

The Documents service allows you to add documents from your company's content repositories to your WebCenter application in the following ways:

- Add any single folder or file in a content repository to a page. Individual files can be added to a page as links, images, or inline frames (depending on the file type). For more information, see Section 10.1.3, "Adding Documents to a Page".
- Add a Documents service task flow to a page:
  - Content Presenter task flow
  - Document Manager task flow
  - Document List Viewer task flow
  - Recent Documents task flow

  For general information about adding a task flow to a page, see Section 10.1.4, "Adding Task Flows to a Page". This chapter provides information about the Documents service task flows and how you can use them to display and manage documents on your WebCenter application pages.

This section provides conceptual information to help you understand the document management capabilites in Oracle WebCenter:

- Section 18.1.1, "What You Should Know About Integration with Microsoft Office"
- Section 18.1.2, "What You Should Know About Integration with Microsoft Windows Explorer"
- Section 18.1.3, "What You Should Know About the Documents Service Task Flows"
- Section 18.1.4, "Understanding the Content Presenter Task Flow"
- Section 18.1.5, "Understanding the Document List Viewer Task Flow"
- Section 18.1.6, "Understanding the Document Manager Task Flow"
- Section 18.1.7, "Understanding the Recent Documents Task Flow"

18.1.1 What You Should Know About Integration with Microsoft Office

Oracle WebCenter integrates with the Microsoft Office shared document management functionality for working with Microsoft Word, Excel, or PowerPoint files that belong to a personal space or group space. This functionality is available in Microsoft Office 2003 and later, and the backend content repository must be Oracle Content Server. For information about using this functionality, see Section 18.2, "Working with Microsoft Office Integration."

When you open a file using Microsoft Office shared document management functionality, the file is automatically checked out of the Oracle Content Server repository, and the **Status** column for the file in WebCenter Spaces shows a Checked Out icon. To make your changes available to other users, you can check the file in using the Microsoft Office task pane.

The Microsoft Offic task pane offers alternate ways to perform tasks that can also be performed within WebCenter Spaces, as shown in Table 18–1.

Table 18–1 File Management Tasks

Task	Microsoft Office Document Management	WebCenter Spaces Application
Opening a file.	See Section 18.2.1, "Opening a File."	See Section 18.4.5.1, "Opening a File."
Adding a new file to a personal space or group space.	See Section 18.2.3.1, "Adding a File."	See Section 18.4.3, "Adding a File."
Adding a new folder to a personal space or group space.	See Section 18.2.3.2, "Adding a New Folder."	See Section 18.4.4, "Creating and Copying Folders."
Checking a file out and in.	See Section 18.2.3.3, "Checking a File Out" and Section 18.2.3.4, "Checking a File In."	See Section 18.4.6.2, "Checking a File Out or In."
Performing actions on the currently open file.	See Section 18.2.3.5, "Managing the Currently Open File."	See Section 18.4.6, "Managing Files and Folders in a Document Manager Task Flow."
Performing actions on other files in the current folder.	See Section 18.2.3.6, "Managing Other Files in the Current Personal Space or Group Space."	See Section 18.4.6, "Managing Files and Folders in a Document Manager Task Flow."
Performing actions on subfolders in the current folder.	See Section 18.2.3.7, "Managing Folders."	See Section 18.4.6, "Managing Files and Folders in a Document Manager Task Flow."
Viewing link targets.	See Section 18.2.3.8, "Viewing Link Targets."	See Section 21.2.3, "Accessing Link Targets."
Working with file version history.	See Section 18.2.3.10, "Working with File Version Histories."	See Section 18.4.6.6, "Working with File Version Histories."
Adding new members to a group space.	See Section 18.2.3.11, "Adding Members to a Group Space."	See Section 13.12, "Making a Group Space Available."
Sending a mail message.	See Section 18.2.3.12, "Sending a Message."	See Section 2.6.3, "Sending a Message to Group Space Members or Moderators."

18.1.2 What You Should Know About Integration with Microsoft Windows Explorer

Oracle WebCenter integrates with Microsoft Windows Explorer to manage the files and folders in a personal space or group space when the backend content repository is Oracle Content Server. To use this functionality, you create a network place in Windows Explorer for your personal space or group space documents. See Section 18.3, "Working with Windows Explorer Integration."

18.1.3 What You Should Know About the Documents Service Task Flows

In a runtime environment (the WebCenter Spaces application and deployed custom WebCenter applications), end users with privileges to edit pages can use the Oracle Composer Catalog to include Documents service task flows on a page. In the Oracle Composer Catalog, the **Documents** section includes the Documents service task flows, along with items that provide access to folders and files that you can add to your page in a selected Documents service task flow, as shown in Figure 18–1.

Figure 18–1 Oracle Composer Catalog in WebCenter Spaces: Documents Section in the WebCenter Spaces Application (when editing a personal space page)

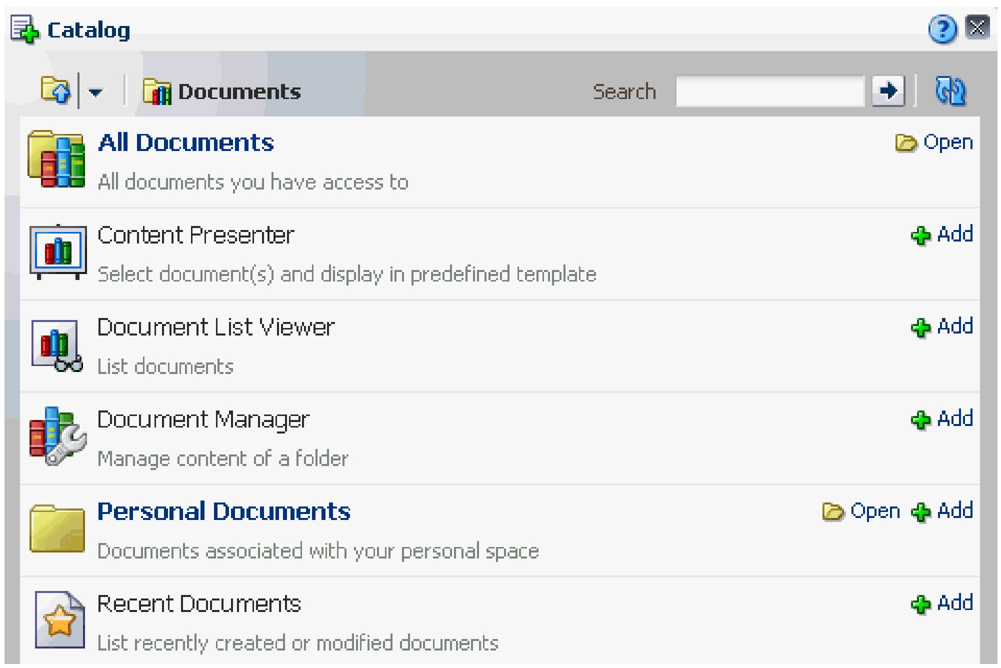


Table 18–2 describes each entry in the **Documents** section of the Oracle Composer catalog:

Table 18–2 Oracle Composer Catalog Documents Section

Item	Task Flow?	Description and Use
All Documents	No	A virtual node that exposes a list of all files and folders to which you have access. Click **Open** to drill down, or enter a file name in the **Search** field. Click **Add** to display a menu where you can choose a task flow in which to display the current folder or files.
Content Presenter	Yes	Displays selected documents in a predefined template. See Section 18.1.4, "Understanding the Content Presenter Task Flow."
Document List Viewer	Yes	Displays selected files, and optionally folders, to which you have access. See Section 18.1.5, "Understanding the Document List Viewer Task Flow."

Table 18–2 (Cont.) Oracle Composer Catalog Documents Section

Item	Task Flow?	Description and Use
Document Manager	Yes	Displays selected folders and files, with file management capabilities. See Section 18.1.6, "Understanding the Document Manager Task Flow."
(in WebCenter Spaces only) Group Space Documents Personal Documents	No	A shortcut that exposes a list of files and folders associated with the current personal space or group space. Click **Open** to drill down, or enter a file name in the **Search** field. Click **Add** to display a menu where you can choose a task flow in which to display the current folder or files.
Recent Documents	Yes	Displays a list of the files most recently created or modified in the currently selected folder. See Section 18.1.7, "Understanding the Recent Documents Task Flow."

18.1.4 Understanding the Content Presenter Task Flow

The Content Presenter task flow allows you to select a single item of content, multiple content items, or query for content, and then apply a template to render the content on a page in a WebCenter application. The content available to Content Presenter resides in an Oracle Content Server backend content repository, which must be configured by your WebCenter administrator (see "Oracle Content Server Prerequisites" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter*), then a connection established to the content repository (see "How to Create a Content Repository Connection Based on the Oracle Content Server Adapter" in *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter*).

The display template may be one of the out-of-the-box templates provided with Oracle WebCenter (see Table 18–8 and Table 18–9), or a custom template designed for your organization (see "Creating Custom Templates for Displaying Content Using Content Presenter" in *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter*).

For the steps to add content to a page in WebCenter Spaces using the Content Presenter task flow, see Section 18.4.2, "Displaying Content Using the Content Presenter Task Flow".

Note: Content added to a page using Content Presenter is not editable.

18.1.5 Understanding the Document List Viewer Task Flow

The Document List Viewer task flow allows you to add information from your organization's content repositories onto a page as a listing of files and, optionally, folders.

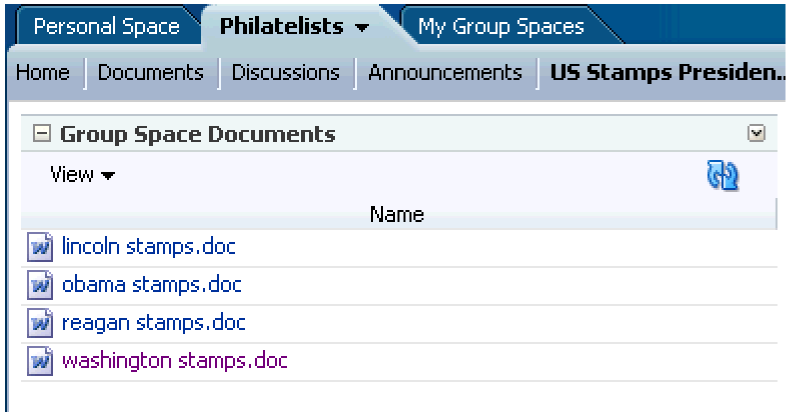
When you click **Add** next to **Document List Viewer** in the Oracle Composer Catalog, the default settings add a listing of the entire root folder of the active content repository connection to the page. You can set the `Connection Name` and `Root Folder Path` properties to change the target location (see Table 18–15), or drill down to the target location in the Oracle Composer catalog then click the corresponding **Add** link and choose **Document List Viewer**. Additionally, the Document List Viewer task flow can be configured to display or hide any subfolders.

When you add a Document List Viewer task flow to a page, the name of the folder that contains the displayed content appears above the viewing area. For example, in Figure 18–2, the name of the folder is `Root Folder`.

Figure 18–2 Document List Viewer Task Flow for All Documents for the Topmost Folder in the Content Repository in the WebCenter Spaces Application (Show Folders property set to true)

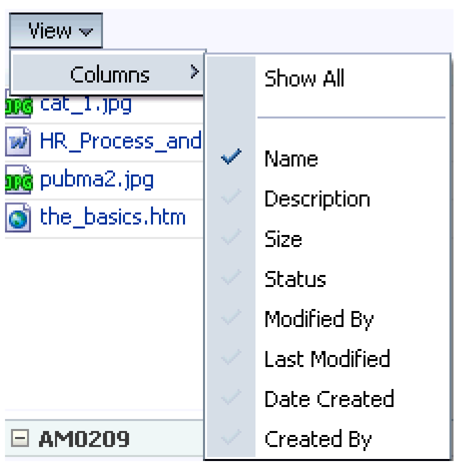
Figure 18–3 Document List Viewer Task Flow for All Documents for a Subfolder in the Content Repository in the WebCenter Spaces Application (Show Folders property set to true)

Figure 18–4 Document List Viewer Task Flow for Group Space Documents Displayed on a Group Space Page in the WebCenter Spaces Application



The Document List Viewer task flow includes a **View** menu, which you can use to personalize the display of the columns in the task flow (Figure 18–5).

Figure 18–5 View Menu on the Document List Viewer Task Flow



For more information about working with the files and folders on a page, see Section 18.4, "Working with the Documents Service Task Flows."

18.1.6 Understanding the Document Manager Task Flow

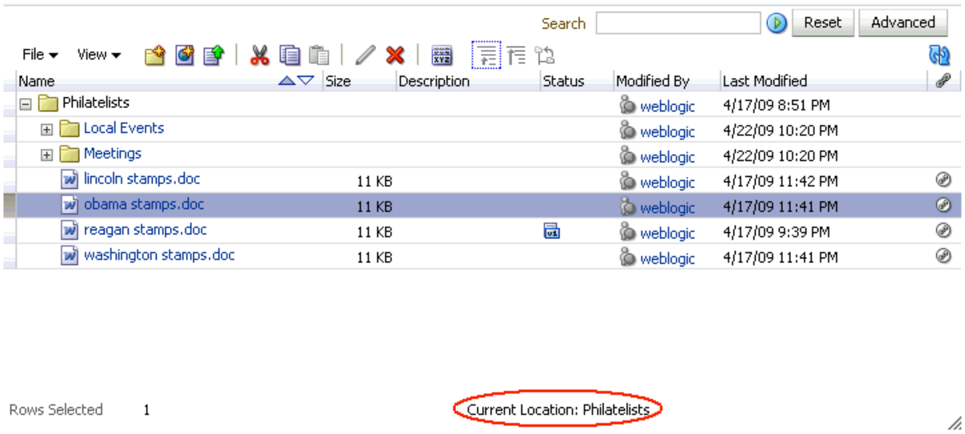
The Document Manager task flow allows you to display a list of all the folders and files in a selected folder, with file management capabilities. Use this task flow to create, upload, and manage folders and files; to manage file versions; and to check files out and in.

When you click **Add** next to **Document Manager** in the Oracle Composer Catalog, a Document Manager task flow for the default or current folder is added to the page. In WebCenter Spaces, the default folder is your personal folder if working with a page in your personal space, and the group space folder if working with a page in a group space (identical to the folder exposed on the **Documents** page). In custom WebCenter applications, the default folder is the root of the active content repository connection. You can also set the `Connection Name` and `Start Folder Path` properties to change the target folder (see Table 18–14), or drill down to the target location in the

Oracle Composer catalog then click the corresponding **Add** link, and choose **Document Manager**.

In the Document Manager task flow, the target folder is the *current location*, displayed in the status bar (in the lower right hand area) of the Document Manager task flow (Figure 18–6).

Figure 18–6 Current Location Displayed In Document Manager Task Flow Status Bar

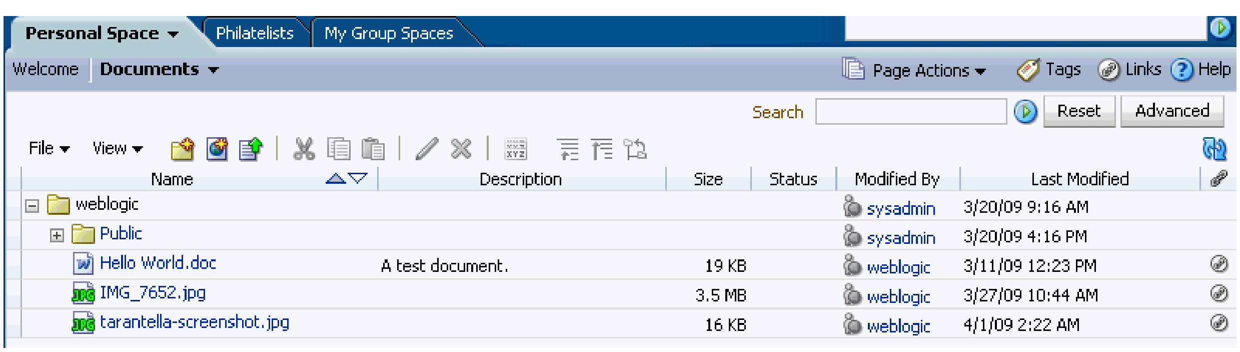


The current location is where any uploaded files, newly created HTML files, or pasted files and folders are placed. Selecting a single folder in the Document Manager task flow makes that folder the current location. In a Document Manager task flow that includes multiple folders, clicking a folder name to display the folder as the top-level folder in the task flow makes that folder the current location.

In WebCenter Spaces, your personal space and all group spaces have a **Documents** page, which is simply a page that is dedicated to the Document Manager task flow. Click the **Documents** tab in your personal space or group space to show the **Documents** page. If you do not see the **Documents** tab, you can display it as follows:

1. In the personal space or group space, click **Page Actions**, then select **Manage Pages**.
2. In the Manage Pages dialog, in the row for the **Documents** page, click **Show Page**.
3. Click **Close** to display the **Documents** page for your personal space or group space, listing all of the documents available to you (Figure 18–7).

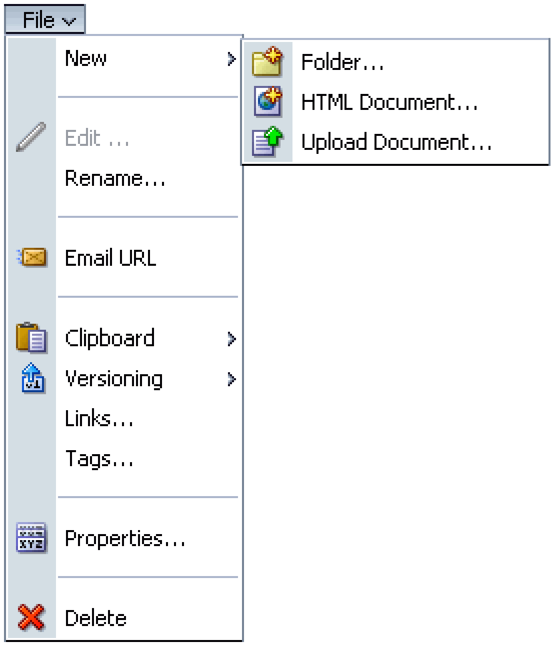
Figure 18–7 A Documents Page in a WebCenter Spaces Personal Space



The Document Manager task flow provides features for supporting and maintaining your content. These include:

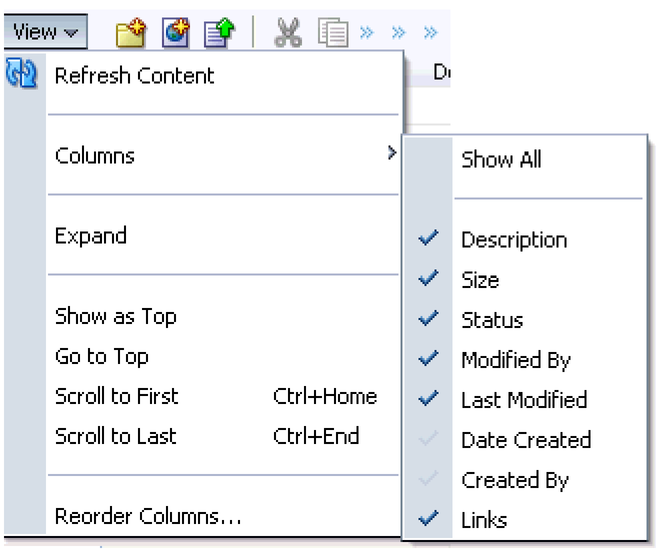
- The **File** menu for convenient access to file and folder features (Figure 18–8).

Figure 18–8 Document Manager File Menu



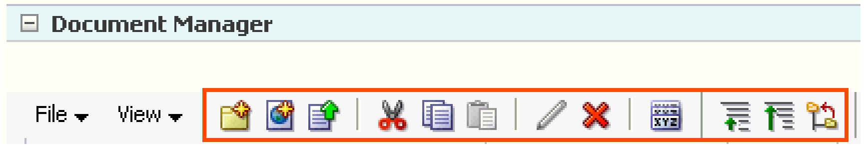
- The **View** menu for setting your document display preferences (Figure 18–9).

Figure 18–9 Document Manager View Menu



- An easy-access toolbar (Figure 18–10).

Figure 18–10 Document Manager Toolbar



Use the Document Manager toolbar for quick access to frequently-used document functions, such as folder creation, file creation and upload, cutting, copying, editing, and deleting. Additionally, you can use icons on the toolbar to access file and folder properties and to adjust your view of repository content.

Note: Actions available on the toolbar are also available on the menus; keep in mind that there is more than one way to accomplish your Document Manager tasks.

- Context menus for convenient access to document functions. Right-click a folder or file icon to display the context menu (Figure 18–11 and Figure 18–12).

Figure 18–11 Document Manager Folder Context Menu (WebCenter Spaces Application)

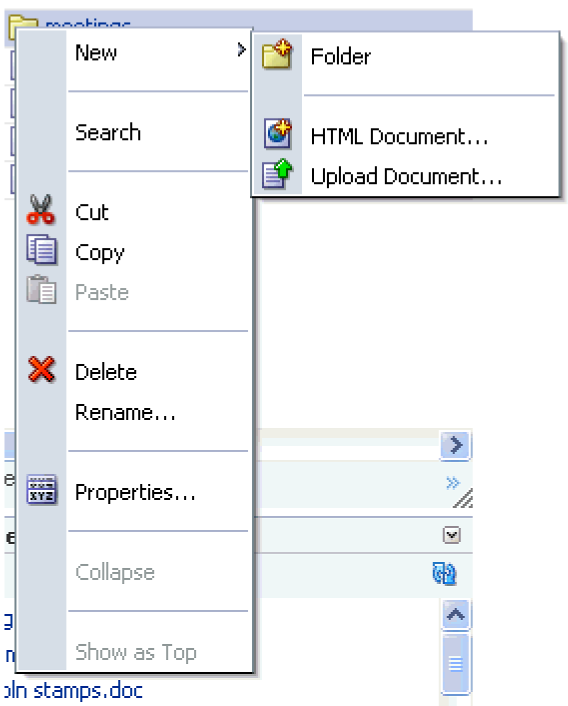
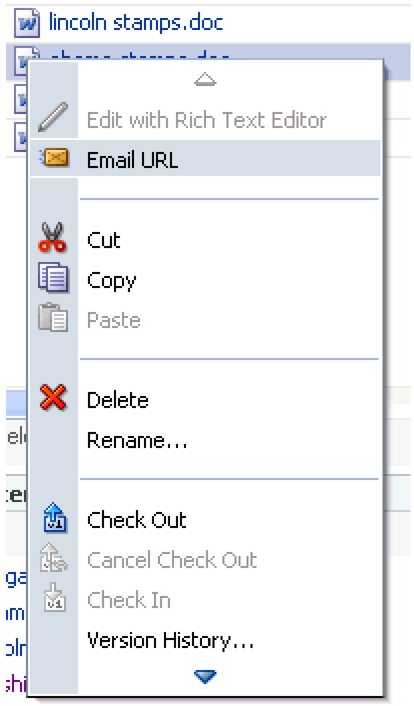


Figure 18–12 Document Manager File Context Menu (WebCenter Spaces Application)



- A dedicated file search.

  The Documents service provides its own search tool, offering both basic and advanced searches. The document search feature stands apart from the Search service by searching only content provided through the Documents service. (For more information about the Search service, see Chapter 28, "Working with the Search Service.")

  For more information, see Section 18.4.8, "Running Document Searches in the Document Manager Task Flow."

- In-place creation and revision of HTML

  Launch the Rich Text Editor (RTE) to create and edit HTML files, and save them directly to the content repository.

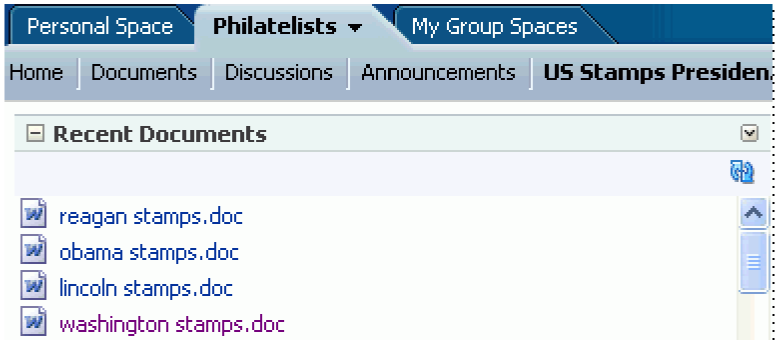
  For more information, see Section 18.4.3.3, "Creating and Editing Rich Text Documents."

> **Note:** The Document Manager task flow offers document review and collaboration features through integration with Oracle AutoVue. For more information, see Section 18.4.6.8, "Reviewing and Collaborating on Documents."

18.1.7 Understanding the Recent Documents Task Flow

The Recent Documents task flow allows you to add a listing of your most recently created or modified files onto a page (Figure 18–13).

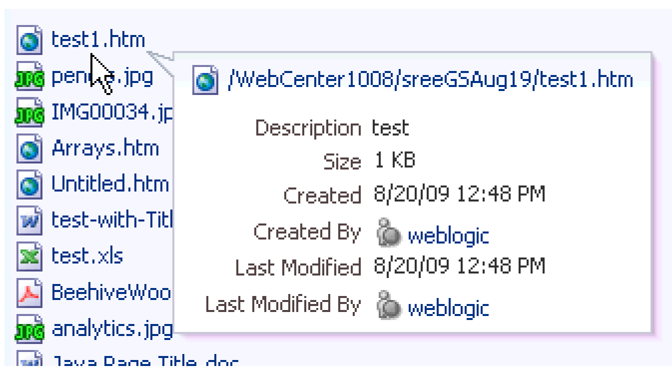
Figure 18–13 Recent Documents Task Flow Displayed on a Group Space Page in WebCenter Spaces



When you click **Add** next to **Recent Documents** in the Oracle Composer Catalog, the default property settings add a listing of the most recently created or modified files in the entire root folder of the active content repository connection to the page. See Section 18.6, "Setting Documents Service Task Flow Properties" to modify the property settings for the Recent Documents task flow.

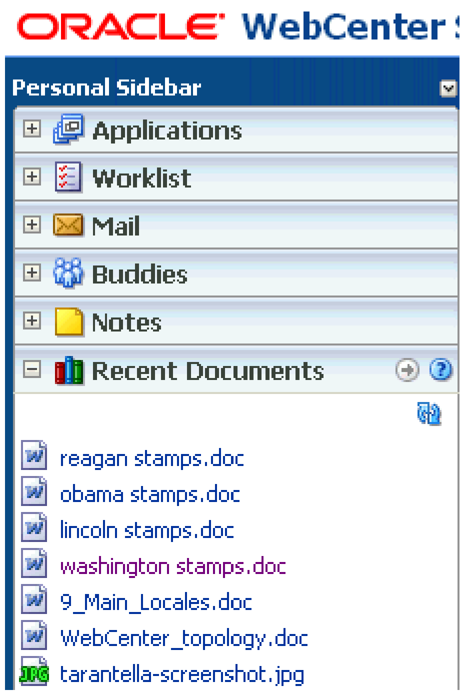
When you add a Recent Documents task flow to a page, hover your mouse pointer over a document in the task flow to display document details (Figure 18–14).

Figure 18–14 Displaying Detailed Information About a Recent Document



In WebCenter Spaces, the Recent Documents task flow appears in the WebCenter Spaces Sidebar by default (Figure 18–15), where you can click a file link in the list to open the file.

Figure 18–15 Recent Documents Task Flow in the WebCenter Spaces Sidebar



18.2 Working with Microsoft Office Integration

Oracle WebCenter integrates with the Microsoft Office shared document management functionality for working with Microsoft Word, Excel, or PowerPoint files that belong to a personal space or group space. This functionality is available in Microsoft Office 2003 and later, and the backend content repository must be Oracle Content Server. For more information, see Section 18.1.1, "What You Should Know About Integration with Microsoft Office."

Many of the tasks you can perform using the Microsoft Office shared document management functionality can also be performed in WebCenter Spaces, as shown in Table 18–1, and described in Section 18.4, "Working with the Documents Service Task Flows."

This section provides steps to perform the following tasks using Microsoft Office shared document management:

- Section 18.2.1, "Opening a File"
- Section 18.2.2, "Displaying and Hiding the Microsoft Office Task Pane"
- Section 18.2.3, "Working with the Microsoft Office Task Pane"
  - Section 18.2.3.1, "Adding a File"
  - Section 18.2.3.2, "Adding a New Folder"
  - Section 18.2.3.3, "Checking a File Out"
  - Section 18.2.3.4, "Checking a File In"
  - Section 18.2.3.5, "Managing the Currently Open File"
  - Section 18.2.3.6, "Managing Other Files in the Current Personal Space or Group Space"

- Section 18.2.3.7, "Managing Folders"
- Section 18.2.3.8, "Viewing Link Targets"
- Section 18.2.3.9, "Viewing Document Information"
- Section 18.2.3.10, "Working with File Version Histories"
- Section 18.2.3.11, "Adding Members to a Group Space"
- Section 18.2.3.12, "Sending a Message"

- Section 18.2.4, "Closing a File"

Note: Oracle WebCenter does not implement administrative features of the Microsoft Office shared document management functionality, such as creating a new workspace, deleting a workspace, or changing a workspace title.

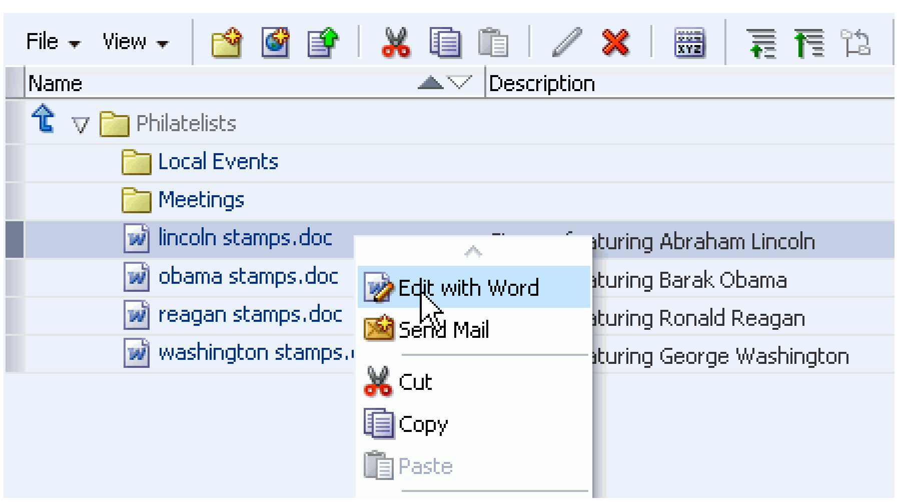
18.2.1 Opening a File

Note: To open any file using the WebCenter Spaces application, see Section 18.4.5, "Opening Files and Folders."

To open a Microsoft Office Word, Excel, or PowerPoint file in your personal space or group space to use the Microsoft Office shared document management functionality:

1. In a personal space or group space, go to a Document Manager task flow on a page or go to the **Documents** page.
2. Right-click in the row containing the file, but not on the file name.
3. In the context menu, select the action that opens the file in Microsoft Office:
   - For Microsoft Word files, choose **Edit with Word** (Figure 18–16).
   - For Microsoft Excel files, choose **Edit with Excel**.
   - For Microsoft PowerPoint files, choose **Edit with PowerPoint**.

Figure 18–16 Open a File in Microsoft Word

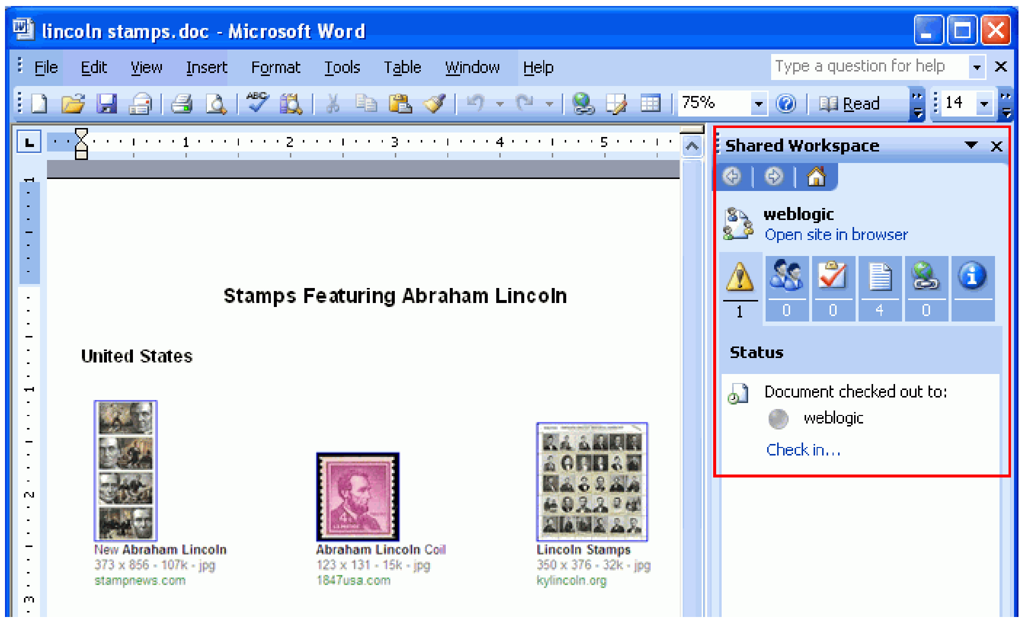


4. If prompted, enter login credentials as required to open the file in Microsoft Office.

Note: If the file is already checked out by another user, the File in Use dialog opens. See Section 18.2.1.1, "Opening a File Already Check Out By Another User."

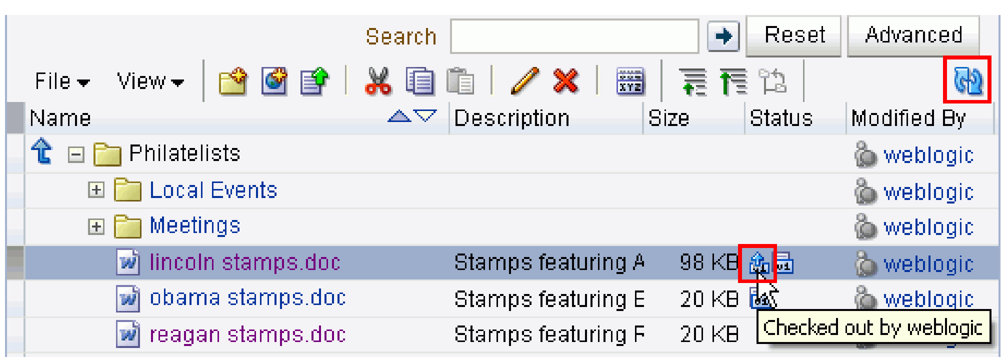
- *In Microsoft Office 2003*. The Microsoft Office application displays a **Shared Workspace** task pane by default (Figure 18–17).
- *In Microsoft Office 2007*. The Microsoft Office application displays no task pane by default. To display the **Document Management** task pane, see Section 18.2.2, "Displaying and Hiding the Microsoft Office Task Pane."

Figure 18–17 Microsoft Office 2003 Shared Workspace Task Pane



When the file opens, it is automatically checked out. In WebCenter Spaces, click the **Refresh** icon to show the **Checked Out** icon for the selected file (Figure 18–18).

Figure 18–18 Checked Out Icon in WebCenter Spaces

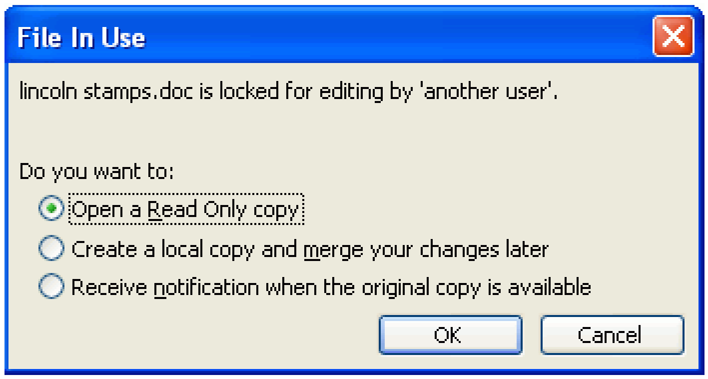


You can use the Microsoft Office task pane to open other files in the personal space or group space directly from Microsoft Office, instead of from WebCenter Spaces. See Section 18.2.3.6, "Managing Other Files in the Current Personal Space or Group Space."

18.2.1.1 Opening a File Already Check Out By Another User

If the file that you attempt to open is already checked out by another user, the File In Use dialog opens (Figure 18–19).

Figure 18–19 File in Use Dialog



In the File In Use dialog, select the desired option:

- **Open a Read Only copy** to open the file in its default application to view it.
- **Create a local copy and merge your changes later** is not supported.
- **Receive notification when the original copy is available** to open a read-only copy of the file until it is available for editing. When the file is available, the File Now Available dialog (Figure 18–20) notifies you; in the dialog, click **Read-Write** to change the read-only state to editable.

Figure 18–20 File Now Available Dialog

18.2.2 Displaying and Hiding the Microsoft Office 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 in the following ways:

- Section 18.2.2.1, "Displaying or Hiding the Task Pane Manually"
- Section 18.2.2.2, "Displaying or Hiding the Task Pane By Default"

18.2.2.1 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, choose **Shared Workspace** to toggle between displaying and hiding the task pane.

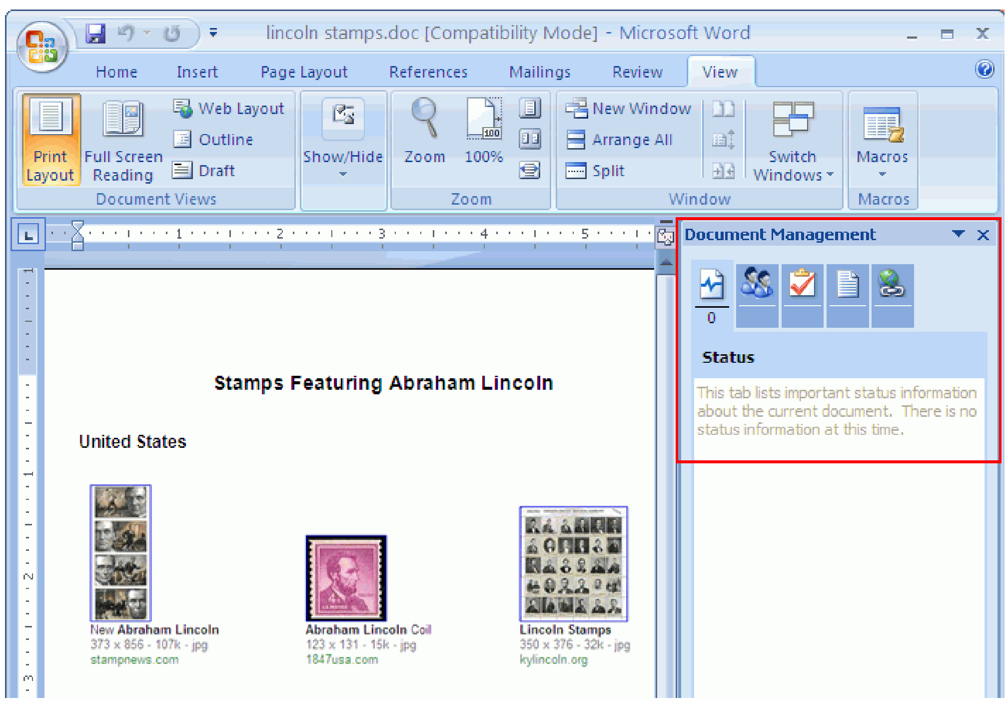
In Microsoft Office 2007:

1. Click the Office Button (Figure 18–21) in the top left corner of the Microsoft Office application.

Figure 18–21 Office Button in Microsoft Office

2. From the **Server** menu, choose **Document Management Information** to toggle between displaying and hiding the **Document Management** task pane (Figure 18–22).

Figure 18–22 Microsoft Office 2007 Document Management Task Pane



18.2.2.2 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, choose **Options**.
2. In the Options dialog, on the **General** tab, click **Service Options**.
3. In the **Shared Workspace** category, select or clear the checkbox **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 18–23).

Figure 18–23 Options Link in Task Pane (Microsoft Office 2007)

2. In the Service Options dialog, select or clear the checkbox **The document is part of a workspace or SharePoint site** to respectively display or hide the task pane by default.

18.2.3 Working with the Microsoft Office Task Pane

The Microsoft Office task pane provides information pertaining to the currently open file and access to tasks for all files and folders in the current personal space or group space, as described in Table 18–3.

Table 18–3 Microsoft Office Task Pane for Personal Space or Group Space Files

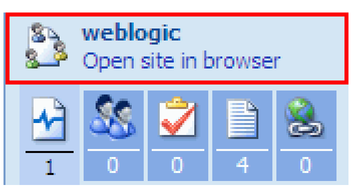
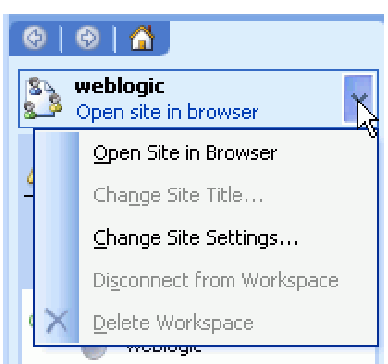
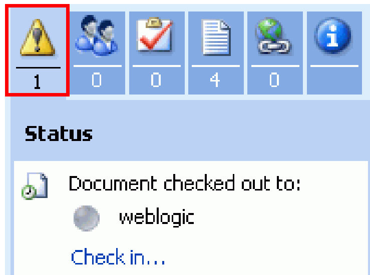
Task Pane Area	Description
Top section in Microsoft Office 2003: 	For a file in a personal space: ■ Shows the user name. ■ **Open site in browser**. Click to display the personal space home page. For a file in a group space: ■ Shows the group space name. ■ **Open site in browser**. Click to display the group space home page.
Top section in Microsoft Office 2007: 	Additionally, the top section provides a dropdown menu of actions available for the user or group space: ■ **Open Site in Browser**. See above. ■ **Change Site Title**. Not supported. ■ **Change Site Settings**. For a personal space, displays the WebCenter Spaces home page; for a group space, displays the Settings tab of the group space. ■ **Disconnect from Workspace**. Not supported. ■ **Delete Workspace**. Not supported.
Dropdown menu: 	

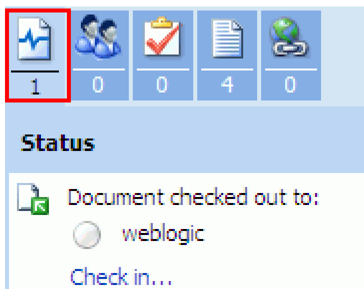
Table 18–3 (Cont.) Microsoft Office Task Pane for Personal Space or Group Space Files

<table>
<tr><th>Task Pane Area</th><th>Description</th></tr>
<tr><td>

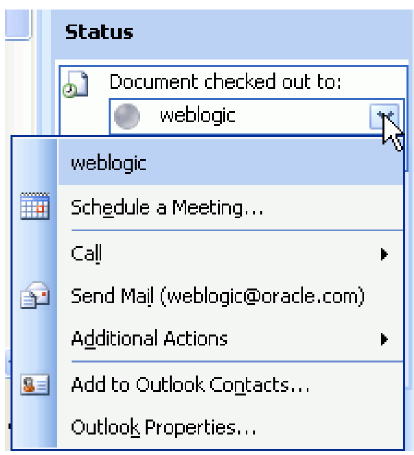
Status section in Microsoft Office 2003:



Status section in Microsoft Office 2007:



Dropdown menu:



</td><td>

For a file in either a personal space or a group space:

- Shows the user who checked out the file.
- **Check in**. See Section 18.2.3.4, "Checking a File In."

  After checking a file in, you can subsequently check the file out again. See Section 18.2.3.3, "Checking a File Out."

Additionally, the **Status** section provides a dropdown menu of actions available for the user:

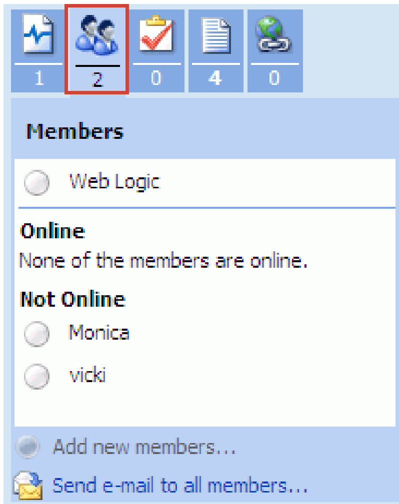
- **Schedule a Meeting**. Opens the Microsoft Outlook calendar scheduler.
- **Call**. Not supported.
- **Send Mail**. Opens a Microsoft Outlook message with the To field populated with the mail address that is specified for the user in WebCenter Spaces. See Section 18.2.3.12, "Sending a Message." This selection has the same effect as clicking 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.
- **Outlook Properties**. Opens the Microsoft Outlook E-mail Properties dialog.

</td></tr>
</table>

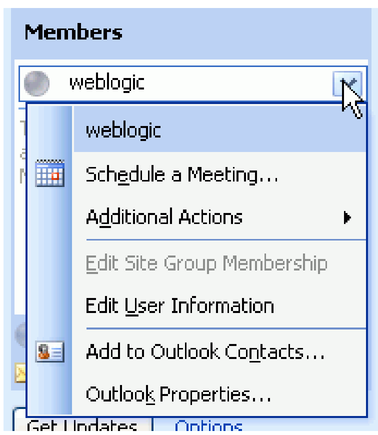
Table 18–3 (Cont.) Microsoft Office Task Pane for Personal Space or Group Space Files

<table>
<tr><th>Task Pane Area</th><th>Description</th></tr>
<tr><td>

Members section:



Dropdown menu:



</td><td>

For a file in a personal space:

Lists the current people connections.
Add new members. Not supported for personal space.
Send e-mail to all members. See Section 18.2.3.12, "Sending a Message."

For a file in a group space:

Lists the user editing the file, followed by the user and group names of all group space members, up to the limit of 99 members. The distinction between Online and Not Online users is not supported; all group space members show in the list as Not Online.
Add new members. See Section 18.2.3.11, "Adding Members to a Group Space."
Send e-mail to all members. See Section 18.2.3.12, "Sending a Message."

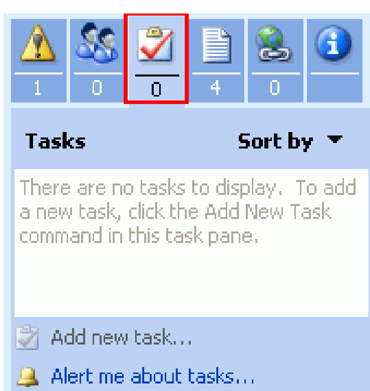
Additionally, the **Members** section provides a dropdown menu of actions available for the listed member(s):

Schedule a Meeting. Opens the Microsoft Outlook calendar scheduler.
Additional Actions. Not supported.
Edit Site Group Membership or Edit Permission Level. Not supported.
Edit User Information. Not supported.
Add to Outlook Contacts. Opens the Microsoft Outlook Contacts page populated with contact information for the member.
Outlook Properties. Opens the Microsoft Outlook E-mail Properties dialog.

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 Spaces.

</td></tr>
<tr><td>

Tasks section:



</td><td>Not supported.</td></tr>
</table>

Table 18–3 (Cont.) Microsoft Office Task Pane for Personal Space or Group Space Files

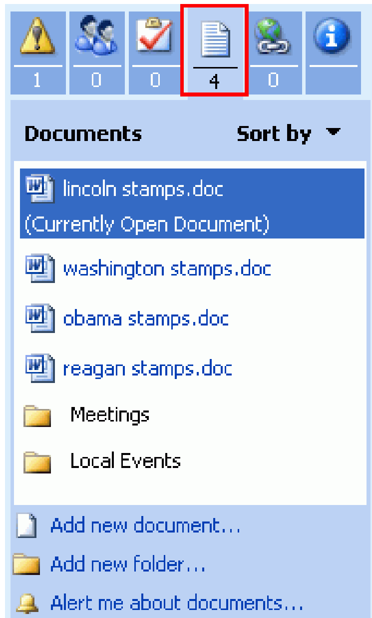
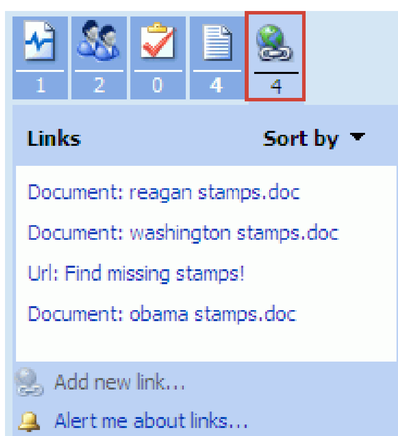
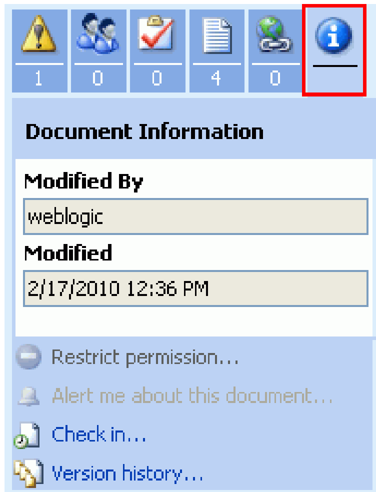
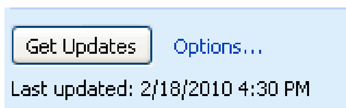
Task Pane Area	Description
Documents section: 	The **Documents** section of the task pane allows you to access other files in the current personal space or group space directly from Microsoft Office. **Sort by**. Choose from the menu to sort the list of documents by **Creation Date**, **Modified Date**, **File Name**, **File Type**, **Ascending**, or **Descending**. For a file in either a personal space or a group space: ■ Shows all files and folders in the folder where the open file resides. See Section 18.2.3.6, "Managing Other Files in the Current Personal Space or Group Space." **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. ■ Provides a menu of actions available on the currently open file. See Section 18.2.3.5, "Managing the Currently Open File." ■ Provides a menu of actions available on other documents in the list. See Section 18.2.3.6, "Managing Other Files in the Current Personal Space or Group Space." ■ Provides a menu of actions for each folder listed. See Section 18.2.3.7, "Managing Folders." ■ **Add new document**. See Section 18.2.3.1, "Adding a File." ■ **Add new folder**. See Section 18.2.3.2, "Adding a New Folder." ■ **Alert me about documents**. Not supported. Opens the home page of the personal space or group space in WebCenter Spaces.
Links section: 	The **Links** section shows all document and URL links defined in WebCenter Spaces to the currently open file. **Sort by**. Choose from the menu to sort the list of links by **Creation Date**, **Modified Date**, **URL**, **Ascending**, or **Descending**. For a file in either a personal space or a group space: ■ Lists all links for the currently open file. See Section 18.2.3.8, "Viewing Link Targets." Click a link to navigate to the linked object.

Table 18–3 (Cont.) Microsoft Office Task Pane for Personal Space or Group Space Files

Task Pane Area	Description
Document Information section (Microsoft Office 2003 only):  	Provides information about the currently open document: ■ **Document Information**. See Section 18.2.3.9, "Viewing Document Information." ■ **Restrict permission**. Not supported. ■ **Alert me about this document**. Not supported. Opens the home page of the personal space or group space in WebCenter Spaces. ■ **Check out** or **Check in**. See Section 18.2.3.3, "Checking a File Out" and Section 18.2.3.4, "Checking a File In." ■ **Version history**. See Section 18.2.3.10, "Working with File Version Histories."
Bottom section:  	For a file in either a personal space or a group space: ■ **Get Updates**. Refreshes the files and associated information from the WebCenter Spaces 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 18.2.3.1, "Adding a File"
- Section 18.2.3.2, "Adding a New Folder"
- Section 18.2.3.3, "Checking a File Out"
- Section 18.2.3.4, "Checking a File In"
- Section 18.2.3.5, "Managing the Currently Open File"
- Section 18.2.3.6, "Managing Other Files in the Current Personal Space or Group Space"
- Section 18.2.3.7, "Managing Folders"
- Section 18.2.3.8, "Viewing Link Targets"
- Section 18.2.3.9, "Viewing Document Information"
- Section 18.2.3.10, "Working with File Version Histories"
- Section 18.2.3.11, "Adding Members to a Group Space"
- Section 18.2.3.12, "Sending a Message"

18.2.3.1 Adding a File

Using the Microsoft Office shared document management functionality, you can add a new file to the Oracle Content Server repository, exposing the file in a personal space or group space, as described in the following sections:

- Section 18.2.3.1.1, "Saving a File As a New File in a Personal Space or Group Space" (Microsoft Word, Excel, or PowerPoint file only)
- Section 18.2.3.1.2, "Adding a New File Using the Task Pane" (files of any type)

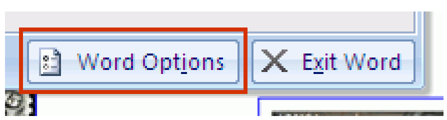
Note: Other methods to add a file to the connected content repository are:

- Create a network place to a personal space or group space, then use Windows Explorer to add files of any type when the backend content repository is Oracle Content Server, as described in Section 18.3, "Working with Windows Explorer Integration."
- In WebCenter Spaces, upload, create a file using the Rich Text Editor (RTE), or copy and paste a file to a personal space or group space, as described in Section 18.4.3, "Adding a File."

18.2.3.1.1 Saving a File As a New File in a Personal Space or Group Space To save a local Microsoft Word, Excel, or PowerPoint file to a personal space or group space:

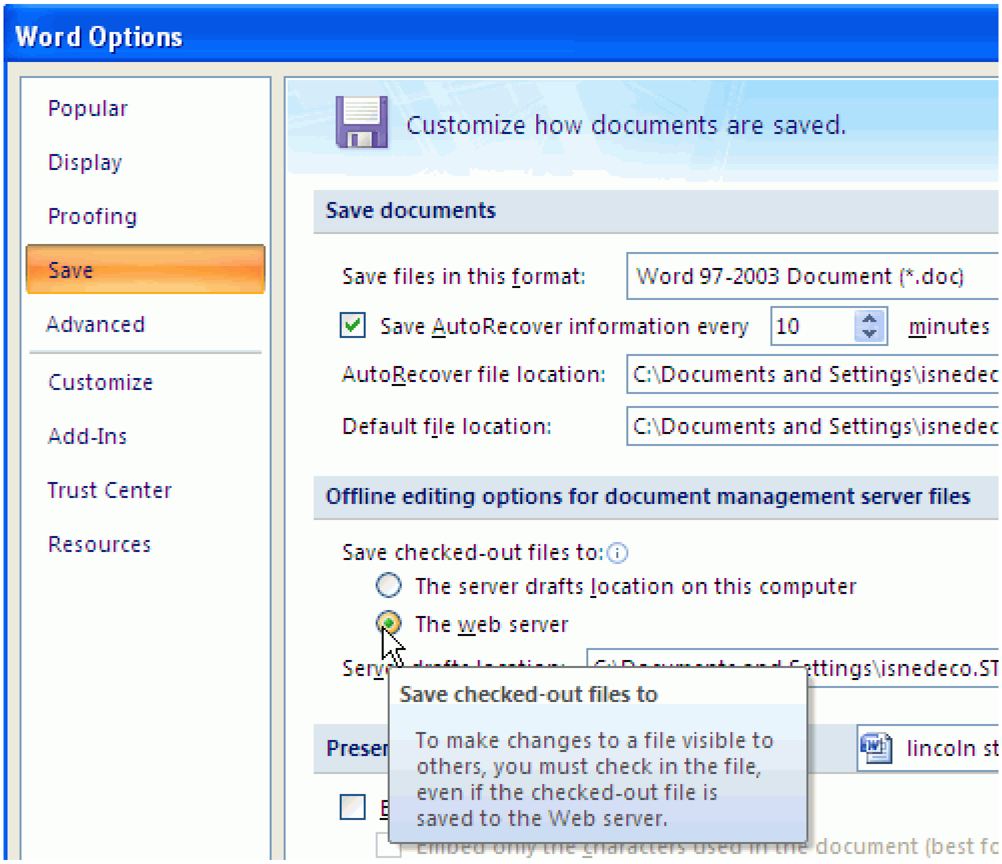
1. Add the personal space or group space as a new network place in Windows Explorer, as described in Section 18.3, "Working with Windows Explorer Integration."
2. Open the file in its Microsoft Office application.
3. (*In Microsoft Office 2007 only*) Set Save options for shared documents:
   a. Click the Office Button in the top left corner of the Microsoft Office application, then click **Word Options** (Figure 18–24) at the bottom of the menu.

Figure 18–24 Office Button Menu: Word Options



   b. In the Word Options dialog, select **Save** in the left pane.
   c. Under **Offline editing options for document management server files**, select **The web server** (Figure 18–25).

Figure 18–25 Word Options Dialog



4. Publish the file to the personal space or group space:

   In Microsoft Office 2003. From the **File** menu, choose **Save As**.

   In Microsoft Office 2007. Click the Office Button, then choose either:

   - **Publish**, then **Document Management Server**.
   - Or, **Save As**, then *Application* **Document**.

5. In the Save As dialog, select the personal space or group space network place, then click **Save**.

6. Enter login credentials for WebCenter Spaces, then click **OK**.

7. In WebCenter Spaces, on the **Documents** page of the personal space or group space, 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 18.2.3.4, "Checking a File In."

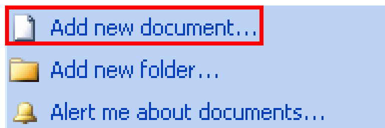
   ---

8. To display the Microsoft Office task pane in the open file, see Section 18.2.2, "Displaying and Hiding the Microsoft Office Task Pane."

18.2.3.1.2 Adding a New File Using the Task Pane To add a new file to a personal space or group space using the Microsoft Office task pane:

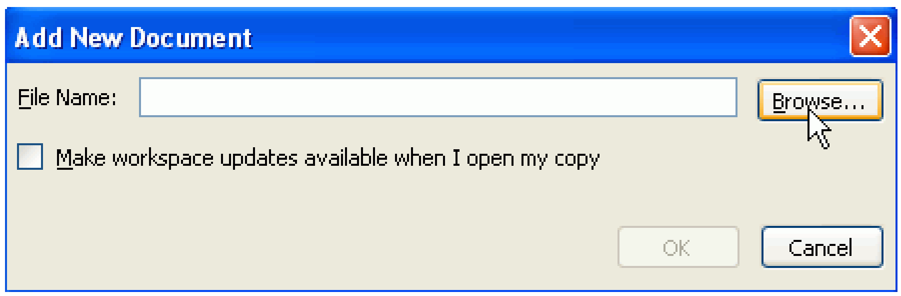
1. Open a Microsoft Office Word, Excel, or PowerPoint file in the personal space or group space to use the Microsoft Office shared document management functionality (see Section 18.2.1, "Opening a File").
2. At the bottom of the **Documents** section of the task pane, click **Add new document** (Figure 18–26).

Figure 18–26 Task Pane Documents Section: Adding a New File



The Add New Document dialog opens (Figure 18–27).

Figure 18–27 Add New Document Dialog



3. Browse to the file that you want to add to the current personal space or group space.

 Note: WebCenter Spaces supports files up to 2GB in size.

 The checkbox **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 personal space or group space in WebCenter Spaces, the file appears in the document list in alphabetical order.

18.2.3.2 Adding a New Folder

Using the Microsoft Office shared document management functionality, you can add a new folder to the Oracle Content Server repository, exposing the folder in a personal space or group space.

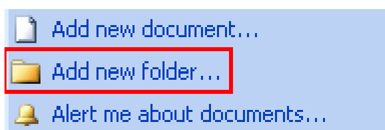
Note: Other methods to add a new folder to a personal space or group space are:

- Create a network place to a personal space or group space, then use Windows Explorer to add a folder, as described in Section 18.3, "Working with Windows Explorer Integration."
- Use the WebCenter Spaces application to add a folder to any connected content repository, as described in Section 18.4.4.1, "Creating Folders Using the Create a New Folder Icon."

To add a new folder to a personal space or group space using the Microsoft Office task pane:

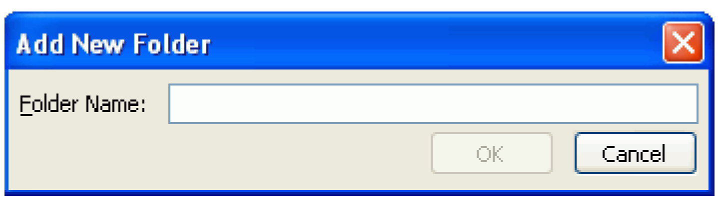
1. Open a Microsoft Office Word, Excel, or PowerPoint file in the personal space or group space to use the Microsoft Office shared document management functionality (see Section 18.2.1, "Opening a File").
2. At the bottom of the **Documents** section of the task pane, click **Add new folder** (Figure 18–28).

Figure 18–28 Task Pane Documents Section: Adding a New Folder



The Add New Folder dialog opens (Figure 18–29).

Figure 18–29 Add New Folder Dialog



3. Enter a name for the new folder, then click **OK**.

Note: The rules for folder names follow the Microsoft Office 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 personal space or group space in WebCenter Spaces, the folder appears in the folder list in alphabetical order.

18.2.3.3 Checking a File Out

Note: To check any file out using the WebCenter Spaces application, see Section 18.4.6.2.1, "Checking a File Out."

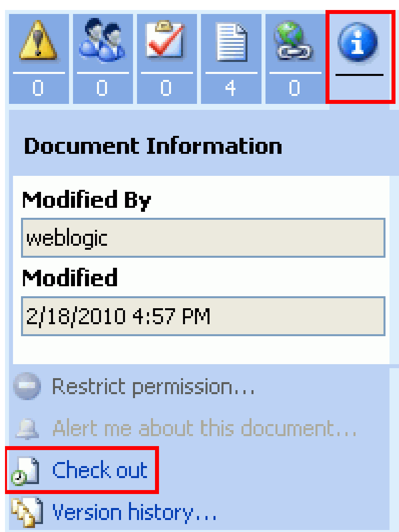
When you open a Microsoft Office Word, Excel, or PowerPoint file in your personal space or group space using the Microsoft Office shared document management functionality, the file is automatically checked out from the Oracle Content Server repository. If you have been granted the appropriate permissions, you can open and check a file out in two environments:

- **From WebCenter Spaces**. Open a file using the Microsoft Office shared document management functionality (see Section 18.2.1, "Opening a File") to automatically check out the file.
- **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.

18.2.3.3.1 Checking the Currently Open File Out Again After Checking It In After you check a file in (see Section 18.2.3.4, "Checking a File In"), the file remains displayed in Microsoft Office until you close it (see Section 18.2.4, "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 18–30). 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 18–30 Checking Out a Checked In File



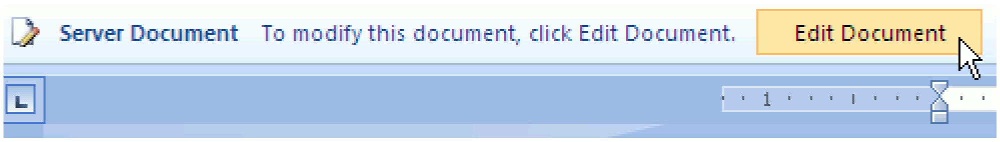
- *In Microsoft Office 2007*. When you check a file in, the Check In dialog (Figure 18–33) provides a checkbox labeled **Keep the document checked out after checking in this version**:
  - Select the checkbox to keep the file checked out after checking in the current version. This allows you to refresh the version of the file available to other users, yet still retain the checked out status to make further changes.
  - Clear the checkbox to check the file in and cancel the checked out status.

  If you clear the checkbox, you can optionally check the file out again:

  - Click **Edit Document** in the area below the toolbar (Figure 18–31).

After you check a file in, Microsoft Office 2007 locks editing that file until you click **Edit Document**.

Figure 18–31 Checking Out and Editing the Current Document



18.2.3.4 Checking a File In

Note: To check any file in using the WebCenter Spaces application, see Section 18.4.6.2.3, "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: Intermittently saving the file 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 WebCenter Spaces repository, you must explicitly check it in. 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:

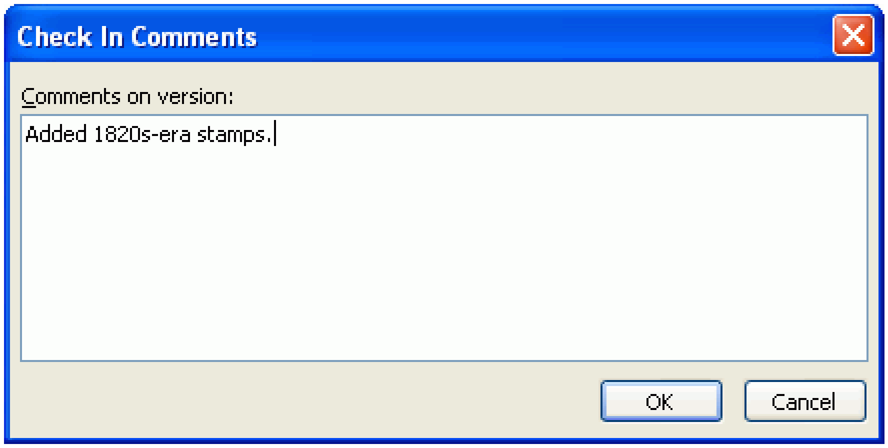
1. In the **Status** section of the Microsoft Office task pane, click **Check in**.

Note: In Microsoft Office 2003, you can also find **Check in** in the **Document Information** section of the task pane.

---

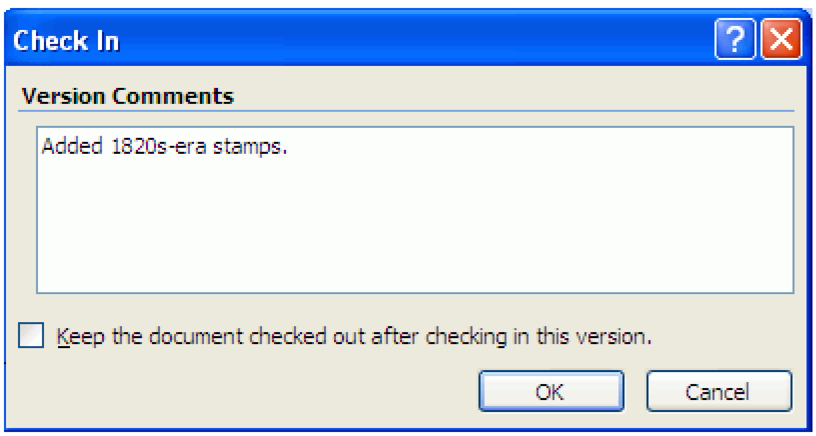
2. *In Microsoft Office 2003*. In the Check In Comments dialog (Figure 18–32), optionally enter comments about the changes made to the file since it was last checked out.

Figure 18–32 Check In Comments Dialog (Microsoft Office 2003)



In Microsoft Office 2007. In the Check In dialog (Figure 18–33), 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 18–33 Check In Dialog (Microsoft Office 2007)

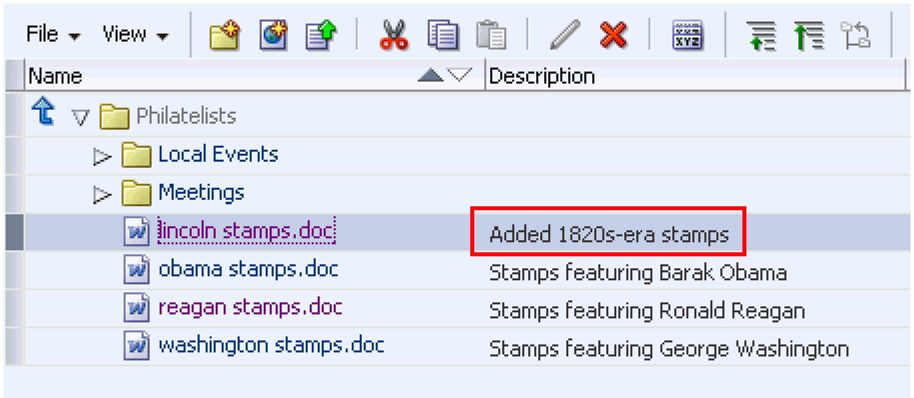


- Select the checkbox to keep the file checked out after checking in the current version. This allows you to refresh the version of the file available to other users, yet still retain the checked out status to make further changes.
- Clear the checkbox to check the file in and cancel the checked out status. To check the file out again, see Section 18.2.3.3.1, "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 Spaces 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 Spaces (Figure 18–34).

Figure 18–34 Documents Listing in WebCenter Spaces after Check In



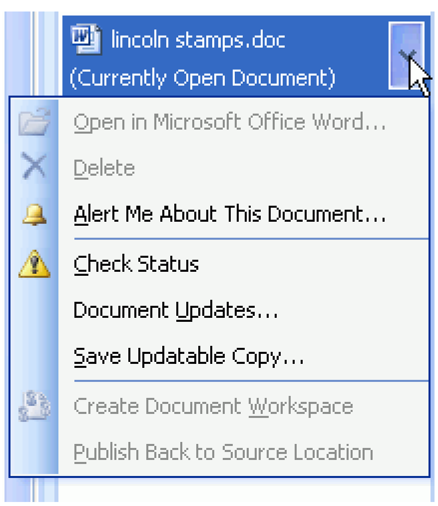
4. After checking a file in, the file remains displayed in Microsoft Office until you close it (see Section 18.2.4, "Closing a File"). If you wish to make further changes to the file, see Section 18.2.3.3.1, "Checking the Currently Open File Out Again After Checking It In.":
5. When you have finished making changes and checking in the file, close the Microsoft Office application (see Section 18.2.4, "Closing a File").

18.2.3.5 Managing the Currently Open File

To manage the currently open file using the Microsoft Office task pane:

1. In the **Documents** section of the task pane, click the dropdown menu icon to the right of the file name (Figure 18–35).

Figure 18–35 Task Pane Documents Section: Current File Menu



2. Select an available action, as described in Table 18–4:

Table 18–4 Dropdown Menu Actions for Currently Open File

Menu Action	Description
Open in Microsoft Office *Application*	Not applicable.

Table 18–4 (Cont.) Dropdown Menu Actions for Currently Open File

Menu Action	Description
Delete	Not supported. To delete a file in a personal space or group space, you must use the WebCenter Spaces application (see Section 18.4.6.7, "Deleting Files and Folders") or Windows Explorer (see Section 18.3, "Working with Windows Explorer Integration").
Alert Me About This Document	Not supported. Opens the home page of the personal space or group space in WebCenter Spaces.
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.

18.2.3.6 Managing Other Files in the Current Personal Space or Group Space

To manage a file other than the currently open file in the current personal space or group space 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.

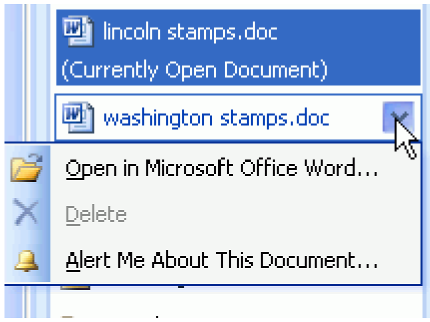
2. To open the file, click its name.

   Depending on the file type, the file opens as described in Section 18.2.1, "Opening a File" for Microsoft Word, Excel, and PowerPoint files, or Section 18.4.5, "Opening Files and Folders" 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 dropdown menu icon to the right of a file name (Figure 18–36):

Figure 18–36 Task Pane Documents Section: Other Fles Menu



4. Select an available action, as described in Table 18–5:

Table 18–5 Dropdown Menu Actions for Other Files

Menu Action	Description
Open in Microsoft Office *Application*	Opens the file in its Microsoft Office application (same effect as clicking the file name). For more information, see Section 18.2.1, "Opening a File."
Delete	Not supported. To delete a file in a personal space or group space, you must use the WebCenter Spaces application (see Section 18.4.6.7, "Deleting Files and Folders") or Windows Explorer (see Section 18.3, "Working with Windows Explorer Integration").
Alert Me About This Document	Not supported. Opens the home page of the personal space or group space in WebCenter Spaces.

18.2.3.7 Managing Folders

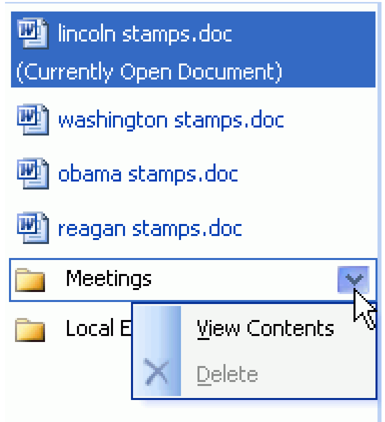
To manage a folder under the current folder using the Microsoft Office task pane:

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 dropdown menu icon to the right of the folder name (Figure 18–37):

Figure 18–37 Task Pane Documents Section: Folder Menu



4. Select an available action, as described in Table 18–6:

Table 18–6 Dropdown Menu Actions for a Folder

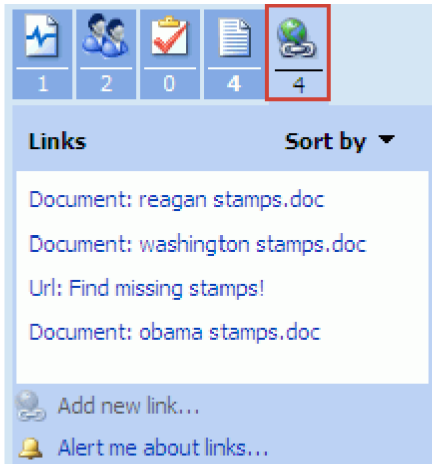
Menu Action	Description
View Contents	Refreshes the list of files with the contents of the folder only (same effect as clicking the folder name). Click the folder name to refresh to the original list.
Delete	Not supported. To delete a folder in a personal space or group space, you must use the WebCenter Spaces application (see Section 18.4.6.7, "Deleting Files and Folders") or Windows Explorer (see Section 18.3, "Working with Windows Explorer Integration").

18.2.3.8 Viewing Link Targets

The **Links** section of the Microsoft Office task pane lists the links defined in WebCenter Spaces that are associated with the currently open file (Figure 18–38). Files can have links to related documents, discussions, announcements, events, notes, and URLs; the Links section in the task pane shows the links to associated documents and URLs.

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**, and so on.

Figure 18–38 Task Pane Links Section



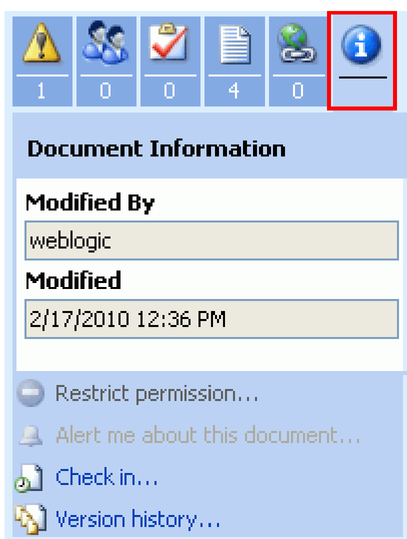
To display the target of a link, simply click the link:

- 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.

18.2.3.9 Viewing Document Information

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 18–39).

Figure 18–39 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 18.2.3.10, "Working with File Version Histories."

18.2.3.10 Working with File Version Histories

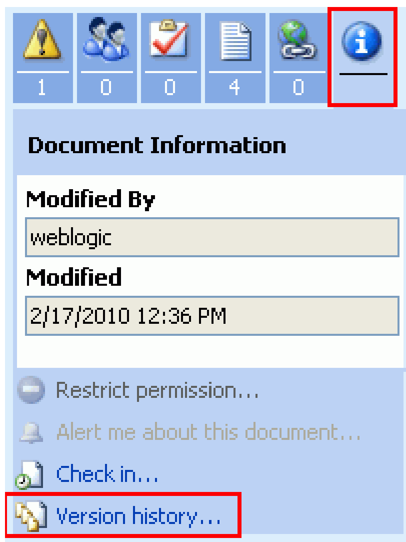
Whenever you check in a file or upload a file into a folder that already contains a file of the same name, WebCenter Spaces creates a new version of the file. When a file has multiple versions, it has a version history.

Note: To use the WebCenter Spaces application to work with the version history of a file in any connected content repository, see Section 18.4.6.6, "Working with File Version Histories."

In Microsoft Office 2003: To view the version history of the currently open file using the Microsoft Office task pane:

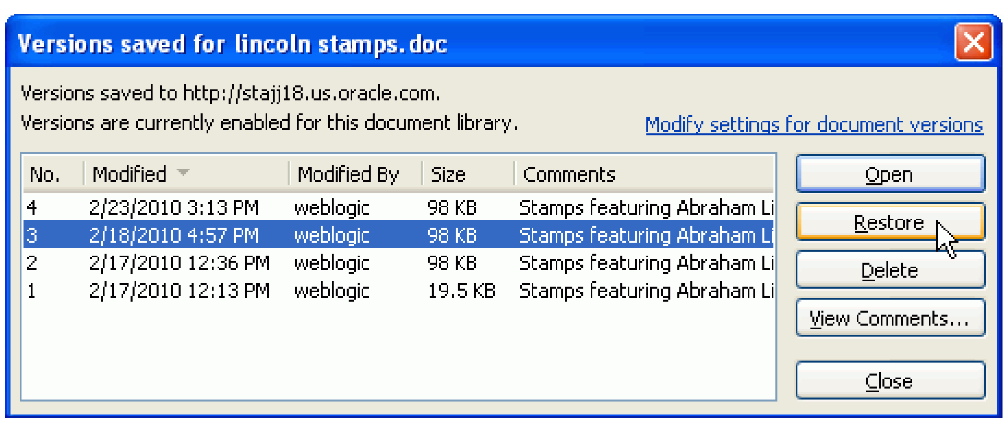
1. In the **Document Information** section of the task pane, click **Version history** (Figure 18–40).

Figure 18–40 Task Pane Document Information Section: Version History



The version history dialog for the file opens (Figure 18–41):

Figure 18–41 Version History for Currently Open File in Microsoft Office 2003



In the version history dialog, select a file version, then select the desired action:

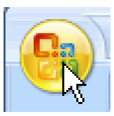
- **Open** to open the selected file version read-only.
- **Restore** is not supported.
- **Delete** to delete the selected file version (inactive for the most recent version).
- **View Comments** to display the comments entered for the selected file version (most useful when the comments are especially long).

2. To open the **Documents** page in the current personal space or group space, 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 18–42) in the top left corner of the Microsoft Office application.

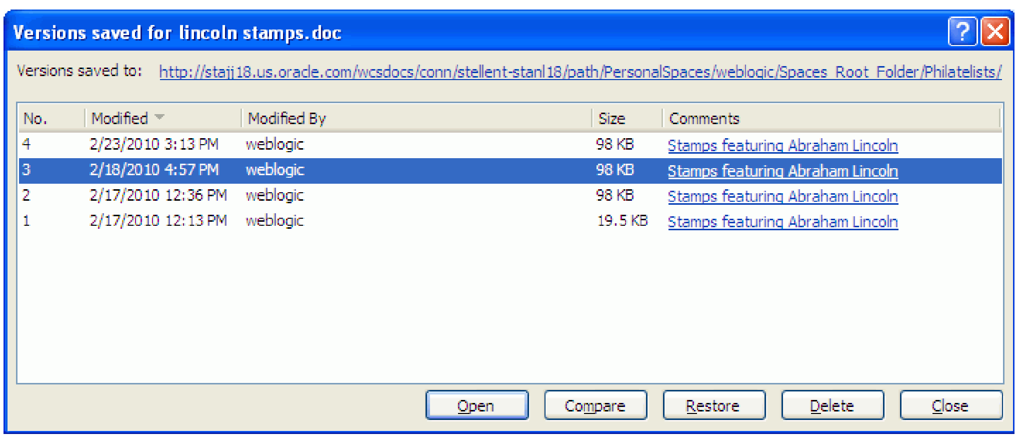
Figure 18–42 Office Button in Microsoft Office



2. From the **Server** menu, choose **View Version History**.

   The version history dialog for the file opens (Figure 18–43):

Figure 18–43 Version History for Currently Open File in Microsoft Office 2007



3. 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).
4. To view the check in comments for a file version, click the link under **Comments**.
5. To open the **Documents** page in the pesonal space or group space, click the link next to **Versions saved to**.

18.2.3.11 Adding Members to a Group Space

Note: To add members to a group space using the WebCenter Spaces application, see Section 13.12.2, "Granting WebCenter Spaces Users Access to a Group Space."

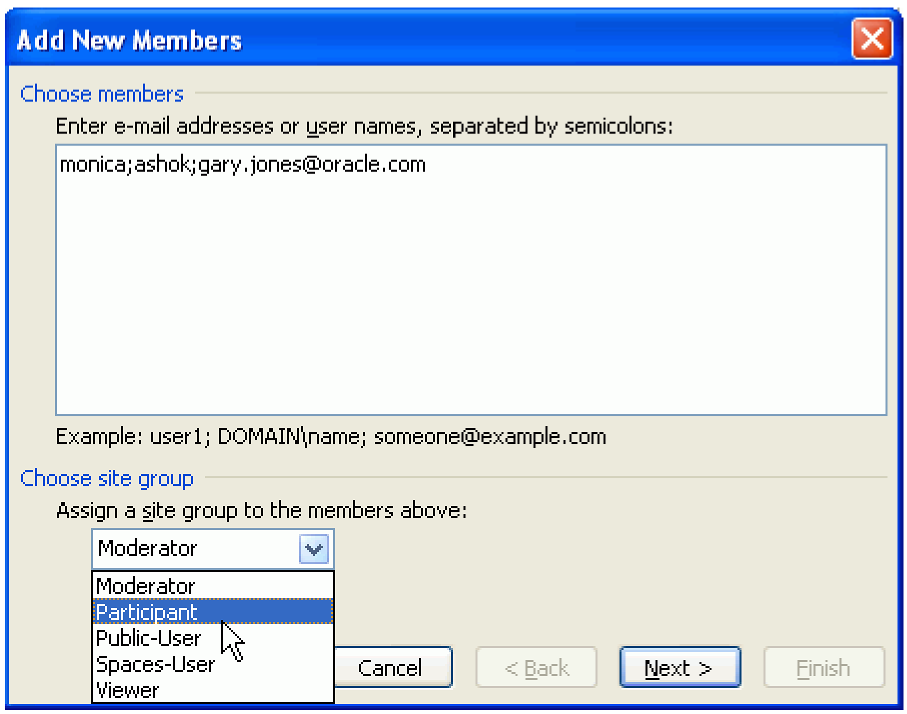
If you are granted the moderator role, you can add new members to a group space using the Microsoft Office task pane. The currently open file must be a group space document.

To add members to a group space when the currently open file is a group space document:

1. In the **Members** section of the task pane, click **Add new members**.

   The Add New Members dialog opens (Figure 18–44).

Figure 18–44 Add New Members Dialog



2. Enter the login names or email addresses of the users you want to add to the group space, separated by semicolons.

Note: Users who are already members of the group space cannot be added again. The user names that you enter must have an associated mail address defined in WebCenter Spaces.

---

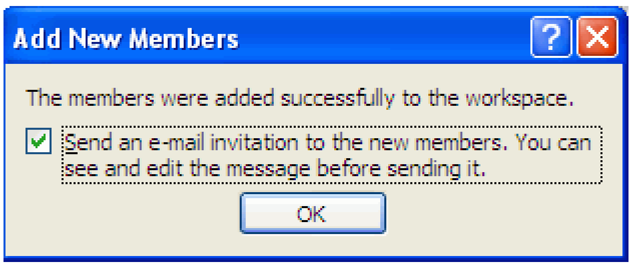
3. From the site group dropdown list, select the role to be given to the listed users. The listed roles are those defined for the current group space. The permissions granted to each role are defined by the WebCenter Spaces administrator or group space moderator. For more information about group space roles, see Section 15.2, "Managing Group Space Roles and Permissions."

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 18–45), select or clear the checkbox to send an invitation to the new members to join the group space, then click **OK**

Figure 18–45 Add New Members Dialog



18.2.3.12 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 Spaces:

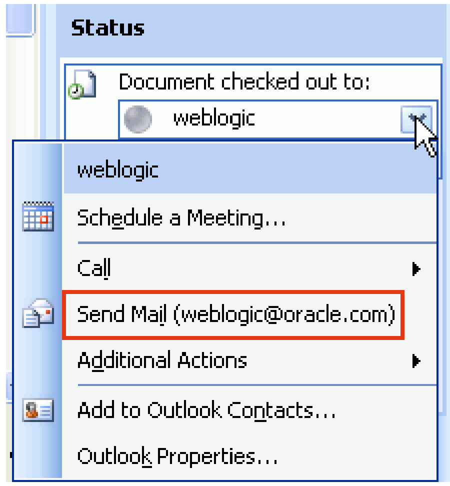
- Section 18.2.3.12.1, "Sending a Message to the Current User"
- Section 18.2.3.12.2, "Sending a Message to Your People Connections"
- Section 18.2.3.12.3, "Sending a Message to All Members of a Group Space"

Note: To send messages using the WebCenter Spaces application, see Section 2.6.3, "Sending a Message to Group Space Members or Moderators", Section 23.1, "What You Should Know About the Send Mail Feature", and Section 23.3.6, "Composing and Sending Mail Messages."

18.2.3.12.1 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 dropdown menu icon next to the user name, and choose **Send Mail** (Figure 18–46).

Figure 18–46 Send a Message to the Current Document User



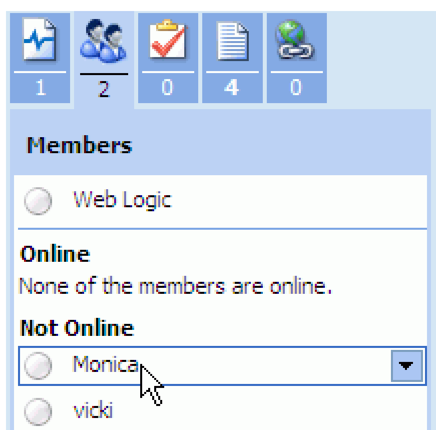
A Microsoft Outlook message composition window open with the To field populated with the mail address that is specified for the user in WebCenter Spaces.

18.2.3.12.2 Sending a Message to Your People Connections To send a message to your people connections when you are working with a document in your personal space:

1. In the **Members** section of the Microsoft Office task pane:

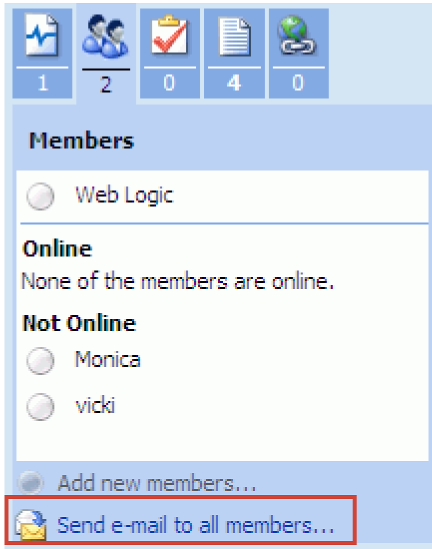
   - To send a message to an individual who is one of your people connections, click the user name in the **Members** list (Figure 18–47):

Figure 18–47 Send a Message to an Individual in People Connections



   - To send a message to all of your people connections, click **Send e-mail to all members** (Figure 18–48).

Figure 18–48 Send a Message to All People Connections



A Microsoft Outlook message composition window opens, where the personal space name is the subject, and the To field is populated with the mail address(es) specified for the people connection(s) in WebCenter Spaces.

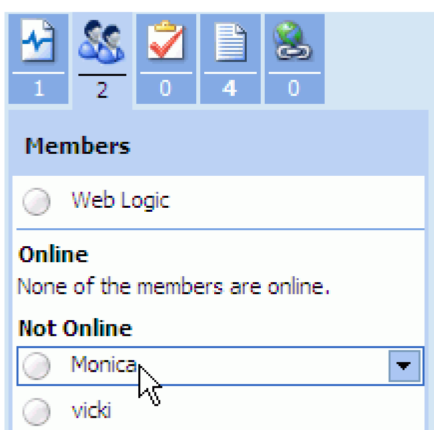
2. Modify the addresses and content of the message as desired, then click **Send**.

18.2.3.12.3 Sending a Message to All Members of a Group Space To send a message to the members of a group space when you are working with a document in a group space:

1. In the **Members** section of the Microsoft Office task pane:

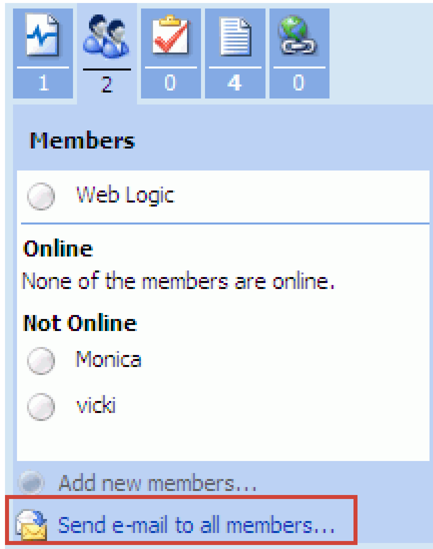
   - To send a message to an individual who is a member of the group space, click the user name in the **Members** list (Figure 18–49):

Figure 18–49 Send a Message to an Individual Group Space Member



   - To send a message to all members of the group space, click **Send e-mail to all members**.

Figure 18–50 Send a Message to All Group Space Members



A Microsoft Outlook message composition window opens, where the group space name is the subject, and To field is populated with the mail address(es) specified for the group space member(s) in WebCenter Spaces

2. Modify the addresses and content of the message as desired, then click **Send**.

18.2.4 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 18.2.4.1, "Closing a File After Checking It In"
- Section 18.2.4.2, "Closing a File Before Checking It In"

18.2.4.1 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 18.2.3.4, "Checking a File In"):

- From the **File** menu, choose **Close**.

18.2.4.2 Closing a File Before Checking It In

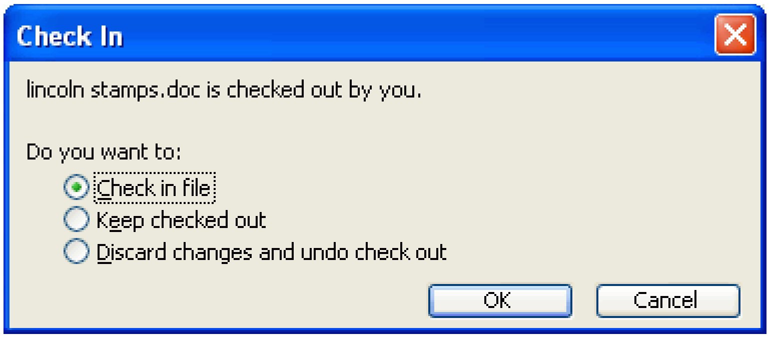
If you attempt to close a file or the Microsoft Office application before you have checked the file in, the Check In dialog provides the opportunity to check it in or cancel the check out and discard changes to the file. The selections in the Check In dialog are dependent on whether or not the file has been modified since the last time it was checked in.

18.2.4.2.1 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, choose **Close**.
2. In the Check In dialog (Figure 18–51), select one of the following actions:

Figure 18–51 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 18–32), 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 18.4.6.2.2, "Canceling File Check 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 18–42) in the top left corner of the Microsoft Office application, then choose **Close**.

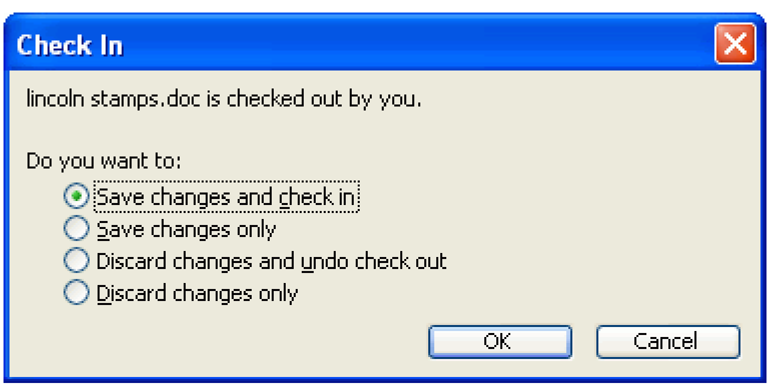
Microsoft Office 2007 does not prompt you to first check the file back in again, so the file remains in a checked out state and locked to changes by other users. To later cancel the checked out status, see Section 18.4.6.2.2, "Canceling File Check Out."

18.2.4.2.2 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 18–52), select one of the following actions:

Figure 18–52 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.

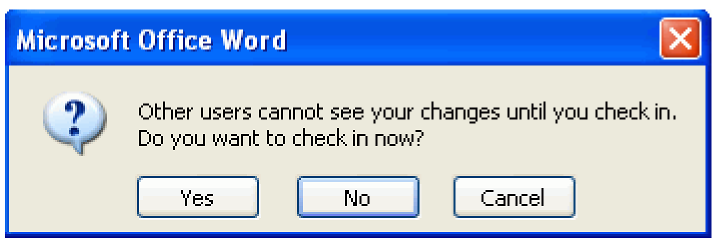
- **Save changes only** to save changes since the last check in, but keep the file checked out and locked to changes by other users. To later cancel the checked out status, see Section 18.4.6.2.2, "Canceling File Check Out."
- **Discard changes and undo check out** to retain the prior saved version of 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 18–42) in the top left corner of the Microsoft Office application, then choose **Close**.
2. If you have not aleady saved the changes, respond to the confirmation prompt to save or discard your changes.
3. In the confirmation dialog (Figure 18–53), respond to the prompt:

Figure 18–53 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 checkout out. See Section 18.2.3.4, "Checking a File In." If you choose to keep the file checked out and locked to changes by other users, see Section 18.4.6.2.2, "Canceling File Check Out" to later cancel the checkout out state.
- **No** to keep the file checked out and locked to changes by other users. To later cancel the checked out status, see Section 18.4.6.2.2, "Canceling File Check Out."

18.3 Working with Windows Explorer Integration

Oracle WebCenter integrates with Microsoft Windows Explorer to manage the files and folders in a personal space or group space when the backend content repository is Oracle Content Server.

In Oracle WebCenter, the most useful feature of Windows Explorer integration is the ability to add multiple files at once to a personal space or group space, rather than uploading each file individually. 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 files and folders in a personal space or group space in Windows Explorer, you create a new Windows network place for your personal space or group space documents, as described in the following sections:

- Section 18.3.1, "Adding a Personal Space as a Network Place"
- Section 18.3.2, "Adding a Group Space as a Network Place"
- Section 18.3.3, "Working with Files Using Windows Explorer"

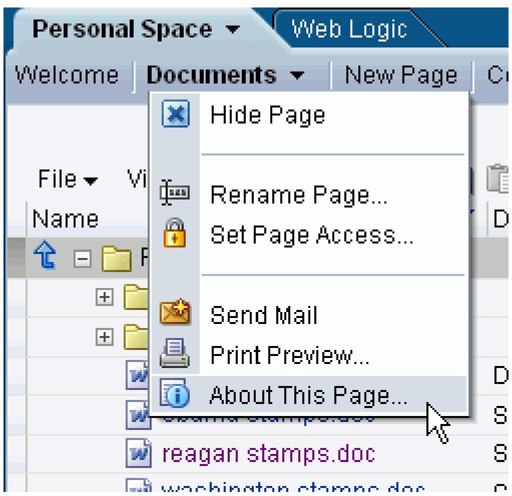
18.3.1 Adding a Personal Space as a Network Place

To expose the files and folders in a personal space using Windows Explorer, you can add the personal space as a Windows network place.

To add a personal space as a Windows network place:

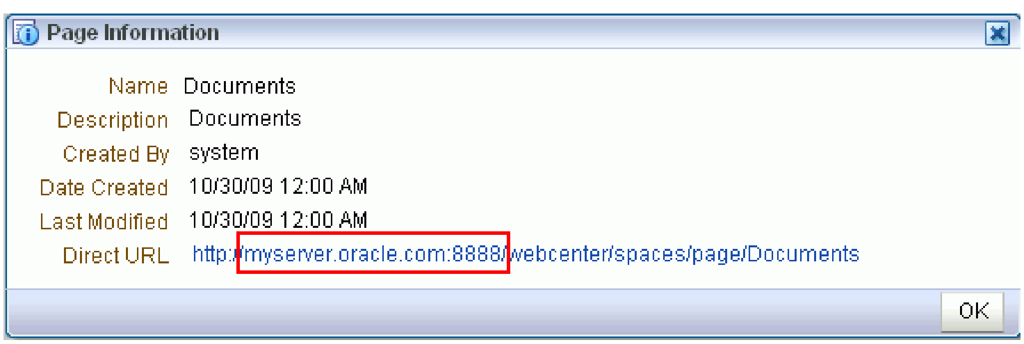
1. In WebCenter Spaces, go to the personal space and click the **Documents** tab.
2. Open the **Documents** tab's actions menu, and choose **About This Page** (Figure 18–54).

Figure 18–54 Personal Space Documents Tab Actions Menu



3. In the Page Information dialog, make note of the host name and port (Figure 18–55).

Figure 18–55 Personal Space Page Information Dialog



4. In Windows, create a new network place. Refer to the Microsoft Windows online help for more information.
5. In the Add Network Place wizard, enter the network address using the following format:

```
http://hostname:port/wcsdocs/conn/repository_
server/path/0/PersonalSpaces/username
```

For example:

```
http://myserver.oracle.com:8888/wcsdocs/conn/myrepository
/path/0/PersonalSpaces/wcsadmin
```

6. At the prompt, enter your WebCenter Spaces login credentials.
7. Optionally enter a name for the personal space network place, then click **Finish**.

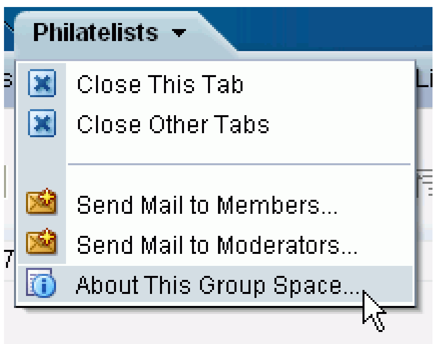
18.3.2 Adding a Group Space as a Network Place

To expose the files and folders in a group space using Windows Explorer, you can add the group space as a Windows network place.

To add a group space as a Windows network place:

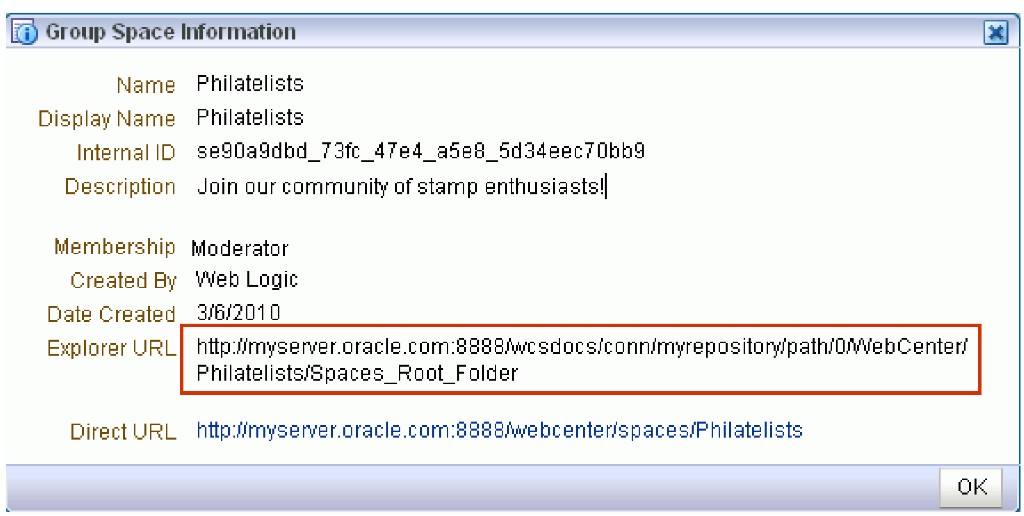
1. In WebCenter Spaces, open the group space tab's actions menu, and choose **About This Group Space** (Figure 18–56).

Figure 18–56 Group Space Tab Actions Menu



2. In the Group Space Information dialog, select and copy the **Explorer URL** value (Figure 18–57).

Figure 18–57 Group Space Information Dialog



3. In Windows, create a new network place. Refer to the Microsoft Windows online help for more information.
4. In the Add Network Place wizard, paste the URL of the group space as the network address.
5. At the prompt, enter your WebCenter Spaces login credentials.
6. Optionally enter a name for the group space network place, then click **Finish**.

18.3.3 Working with Files Using Windows Explorer

Once you have created a Windows network place to a personal space (see Section 18.3.1, "Adding a Personal Space as a Network Place") or group space (see Section 18.3.2, "Adding a Group Space as a Network Place"), you can manage the files and folders in the personal space or group space using Windows Explorer.

Note: If you change the internal name of a group space (see Section 14.2, "Renaming a Group Space (and Changing the Group Space URL)"), the original network place is no longer accessible. You will need to add the group space as a Windows network place again using the new URL.

In Windows Explorer, navigate to the network place for the personal space or group space to:

- Add and delete files and folders.
- Open Microsoft Word, Excel, and PowerPoint files using the Microsoft Office shared document functionality. See Section 18.2, "Working with Microsoft Office Integration."
- Open other file types in their default applications.

When you open a file, it is automatically checked out until you check it back in (see Section 18.2.3.4, "Checking a File In").

The changes you make in Windows Explorer are reflected in WebCenter Spaces, and vice versa.

Note: To use the WebCenter Spaces application to manage files and folders in a personal space or group space in any connected content repository, see Section 18.4.6, "Managing Files and Folders in a Document Manager Task Flow".

18.4 Working with the Documents Service Task Flows

The Documents service task flows provide convenient access to files in your organization's content repositories. Each task flow provides a different view and set of capabilites for working with documents, as discussed in Section 18.1.3, "What You Should Know About the Documents Service Task Flows." One of the Documents service task flows, the *Document Manager task flow*, provides a rich set of tools for adding, revising, versioning, and otherwise managing that content.

Many of the tasks described in this section can also be accomplished using the Microsoft Office shared document management functionality, as shown in Table 18–1, and described in Section 18.2, "Working with Microsoft Office Integration."

This section describes how to use Documents Service task flows to display and manage your files:

- Section 18.4.1, "Adding a Documents Service Task Flow to a Page"
- Section 18.4.2, "Displaying Content Using the Content Presenter Task Flow"
- Section 18.4.3, "Adding a File"
- Section 18.4.4, "Creating and Copying Folders"
- Section 18.4.5, "Opening Files and Folders"
- Section 18.4.6, "Managing Files and Folders in a Document Manager Task Flow"
- Section 18.4.7, "Sharing Content Using a Document Manager Task Flow"
- Section 18.4.8, "Running Document Searches in the Document Manager Task Flow"

18.4.1 Adding a Documents Service Task Flow to a Page

When you add a Documents service task flow to a page, you can select the folders and files to display in the task flow.

To add a Documents Service task flow to a page:

1. Form the **Page Actions** menu, select **Edit Page** to open the page in Oracle Composer.
2. Click **Add Content** in the target region to open the Oracle Composer Catalog.
3. Next to **Documents**, click **Open**, then click **Add** next to the Documents service task flow that you want to add to your page (Content Presenter, Document List Viewer, Document Manager, or Recent Documents).

For general information about adding task flows to a page, see Section 10.1.4, "Adding Task Flows to a Page."

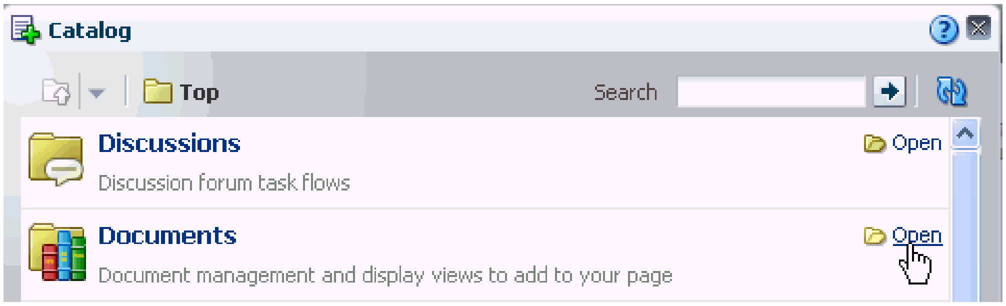
18.4.2 Displaying Content Using the Content Presenter Task Flow

The Content Presenter task flow provides a way to include any type of content in your organization's content repositories on a page, displayed in a selected template. The display template may be one of the out-of-the-box templates provided with WebCenter (see Table 18–8 and Table 18–9), or a custom template that has been designed specifically for the type of content or for your organization. For more information, see Section 18.1.4, "Understanding the Content Presenter Task Flow".

To display content on a page using the Content Presenter task flow in a WebCenter application:

1. As with any Documents service task flow, open the page in Oracle Composer (see Section 10.1.2.1, "Opening a Page in Oracle Composer"), then click **Add Content** in the target region to open the Oracle Composer Catalog.
2. Next to **Documents**, click **Open** (Figure 18–58).

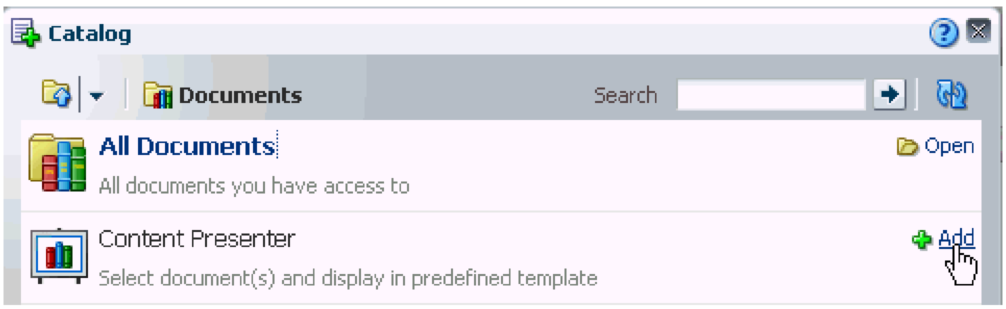
Figure 18–58 Opening the Documents Section in the Oracle Composer Catalog



3. Select the content you want to display in one of two ways:

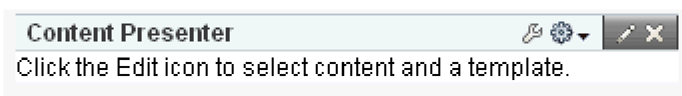
   - Next to **Content Presenter**, click **Add** (Figure 18–59).

Figure 18–59 Adding a Content Presenter Task Flow to a Page



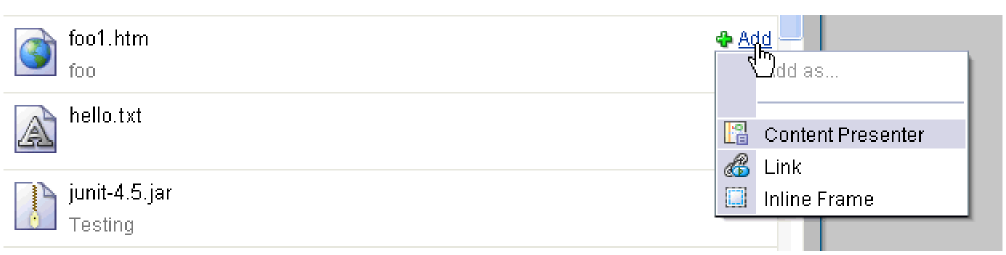
A new empty region appears on your page (Figure 18–60).

Figure 18–60 Adding a Content Presenter Task Flow to a Page



   - Or, drill down in the Oracle Composer Catalog: Next to **All Documents** (or, in WebCenter Spaces, **Group Space Documents** or **Personal Space Documents**), click **Open** to drill down to the folder or file you want to display on the page. When you locate the target content, click **Add**, and choose **Content Presenter** from the menu (Figure 18–61).

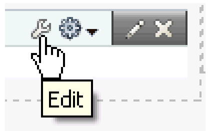
Figure 18–61 Adding Content in Content Presenter Task Flow



Your selection displays in a default template on the page.

4. To further configure the Content Presenter task flow to select or change content, or choose a different template, click the **Edit** (wrench) icon (Figure 18–62).

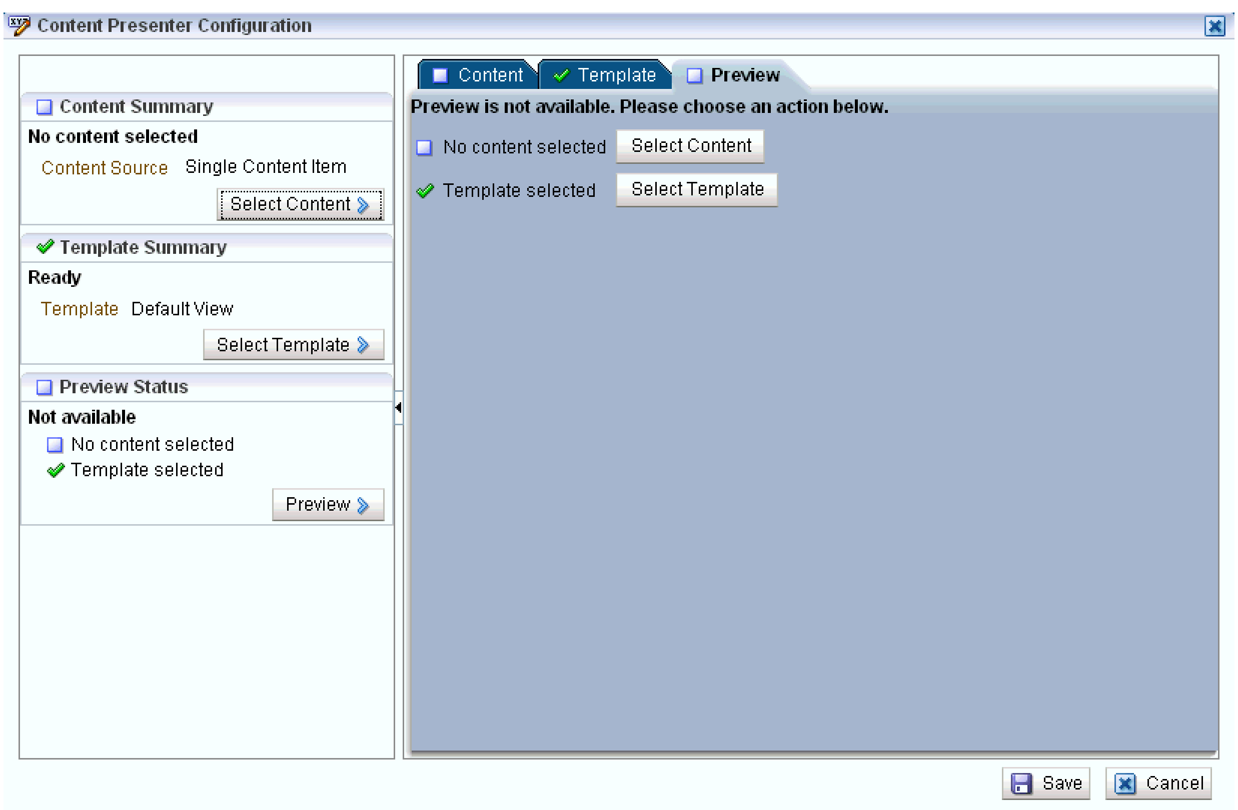
Figure 18–62 Editing a Content Presenter Task Flow



Note: You can also specify content and a display template by clicking the properties **Edit** (pencil) icon and specifying parameters on the **Parameters** tab of the Component Properties dialog. However, specifying parameters in this way is generally intended for use at design time by developers creating a custom application, or for advanced users who want to bind a parameter to an EL expression. If you modify a property value in the Component Properties dialog, the new value overrides the value specified in the Content Presenter Configuration dialog, and that value cannot subsequently be changed through the Content Presenter Configuration dialog. The steps in this section describe the use of the Content Presenter Configuration dialog; for information about Content Presenter task flow parameters, see Section 18.6.1, "Setting Content Presenter Task Flow Properties."

The Content Presenter Configuration dialog opens (Figure 18–63).

Figure 18–63 Content Presenter Configuration Dialog

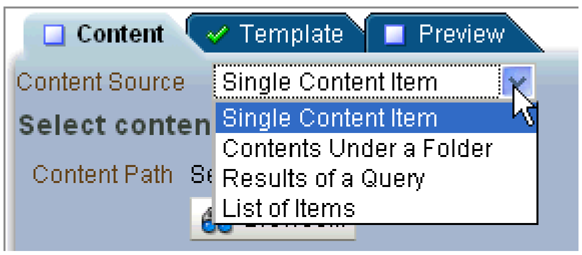


A green check mark alongside each item indicates that the required information is complete and valid.

5. Click **Select Content** or the **Content** tab.
6. On the **Content** page, select the **Content Source** (Figure 18–64):

Note: Content Presenter does not support non-ASCII characters in files that are encoded using the non-UTF-8 character encoding. When users preview such files in Content Presenter, non-ASCII characters appear garbled.

Figure 18–64 Selecting the Content Source

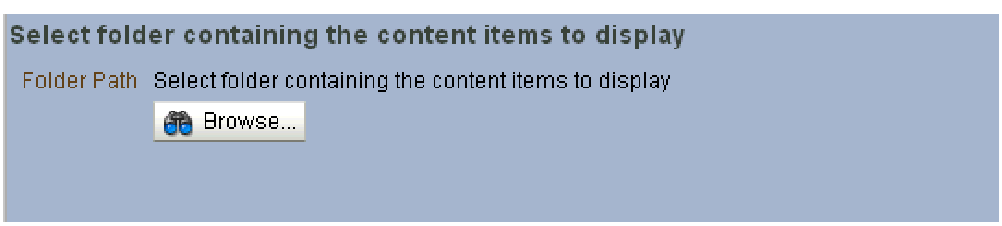


- **Single Content Item** allows you to select a specific item to display on the page. Click **Browse** to locate the item (Figure 18–65).

Figure 18–65 Selecting the Content Source: Single Content Item

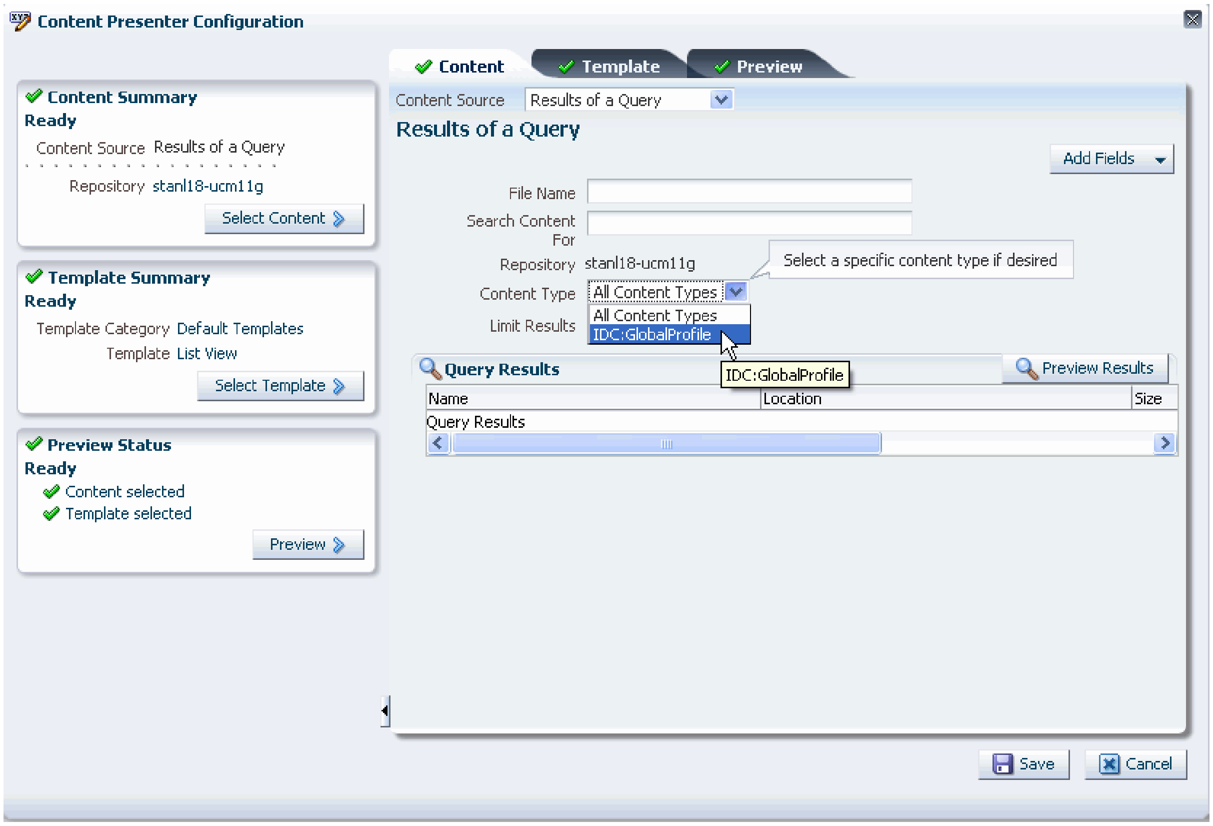
- **Contents Under a Folder** allows you to select a folder to display its contents on the page (in the order stored in the folder). Click **Browse** to locate the folder (Figure 18–66).

Figure 18–66 Selecting the Content Source: Contents Under a Specified Folder



- **Results of a Query** allows you to enter query criteria to refine the selection of the content that displays on the page (Figure 18–67).

Figure 18–67 Selecting the Content Source: Results of a Query



Enter the query criteria, as described in Table 18–7:

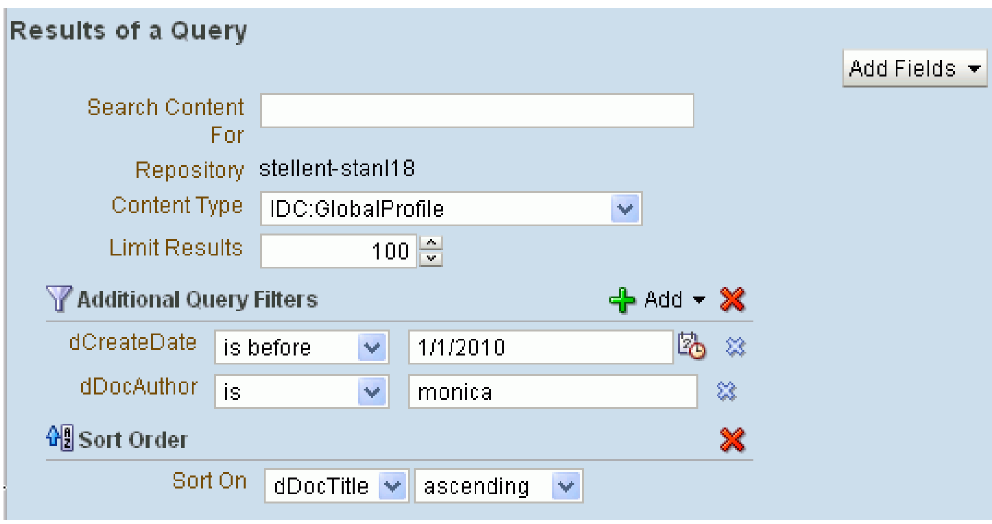
Table 18–7 Specifying Query Criteria for Results of a Query

Element	Description
File Name	Enter the name of a file that you want to display in the selected template. To retrieve multiple content items, use `*` as a wild card character. For example, a value of `*.jpg` retrieves all JPEG image files in the specified **Repository**.
Search Content For	Enter any value that may be present in the content. The value may be one or more words or phrases in the content of document. For information about searching in Oracle Content Server, refer to "Performing a Full-Text Search" in *Getting Started with Content Server*, available at `http://download.oracle.com/docs/cd/E10316_01/owc.htm`
Content Type	Choose **All Content Types** to retrieve content items regardless of the content type. Or, choose a content type from the list. Each content type in the list specifies the name of a profile defined in the Oracle Content Server repository. A content type profile includes 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 type profile defined in Oracle Content Server that can be applied if no other content type profiles are defined.
Limit Results	Specify the maximum number of content items to be returned by the query.

Table 18–7 (Cont.) Specifying Query Criteria for Results of a Query

Element	Description
Add Fields	Choose from the list any of the following to display additional fields to narrow the query: ▪ **Dates**: Adds a **Dates** section to the **Content** page. Enter a date to find content item(s) that match the creation or last modified date. ▪ **Users**: Adds a **Users** section to the **Content** page. Enter a user name to find content item(s) that user created or last modified. ▪ **Filters**: Not applicable when **Content Type** is set to **All Content Types**. For other content types (such as **IDC:GlobalProfile**), adds an **Additional Query Filters** section to the **Content** page (Figure 18–68). Click the **Add** icon to list all the properties that are defined for the selected content type. Select one or more properties to refine the query to find content items with specific property settings. ▪ **Sorting**: Not applicable when **Content Type** is set to **All Content Types**. For other content types (such as **IDC:GlobalProfile**), adds a **Sort Order** section to the **Content** page. Specify a sort order for the properties shown in the **Sort On** list (Figure 18–68). The selected content type allows sorting on only the listed properties.

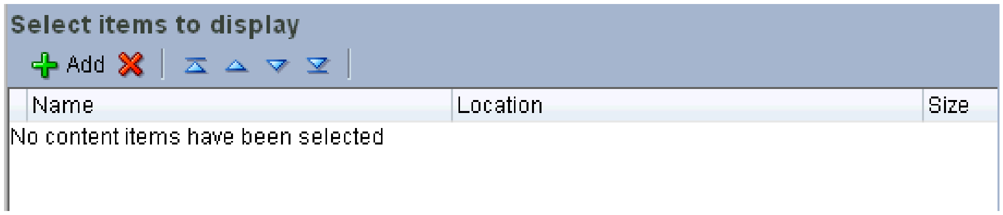
Figure 18–68 Adding Query Criteria Fields



Note: The query is stored and rerun to retrieve the latest content each time you view the Content Presenter instance.

- **List of Items** allows you to browse or search for any number of items to add to a list, and delete or reorder the items before adding the list to the page (Figure 18–69).

Figure 18–69 Selecting the Content Source: List of Items



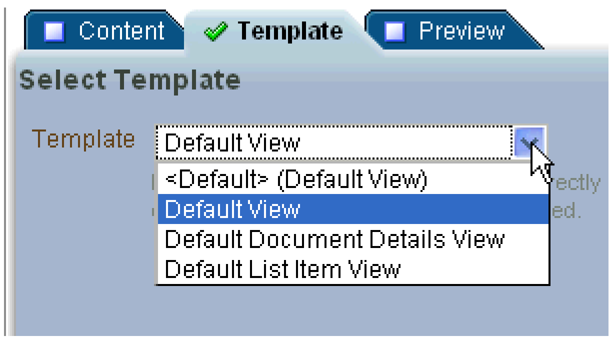
7. Click **Select Template** or the **Template** tab.

   The templates that are available for selection are those that are identified by Content Presenter as suitable for displaying the selected content item(s). For more information, see "Identifying Display Templates for Selected Content Items" in *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter*.

8. On the **Template** page:

   - If the Content Source selected on the **Content** page is a single content item, select the **Template** (Figure 18–70):

Figure 18–70 Selecting the Display Template (for Single Content Items)



   The **Default** templates in the list are out-of-the-box templates for single content items (see Table 18–8). Other selections that may be available in the list are custom display templates developed specifically for your WebCenter application.

   Note: The selections available reflect the entries specified by your organization's template developer in `templates-registry.xml` under `<content-templates>`. For more information, see "Creating Custom Templates for Displaying Content Using Content Presenter" in *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter*.

   - If the **Content Source** selected on the **Content** page is a multiple content item (Contents Under a Folder, Results of a Query, or List of Items), select the **Template Category** (Figure 18–71), then the **Template** (Figure 18–72).

Figure 18–71 Selecting the Template Category (for Multiple Content Items)

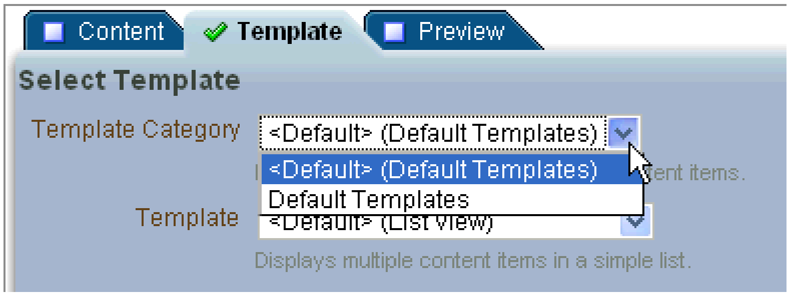
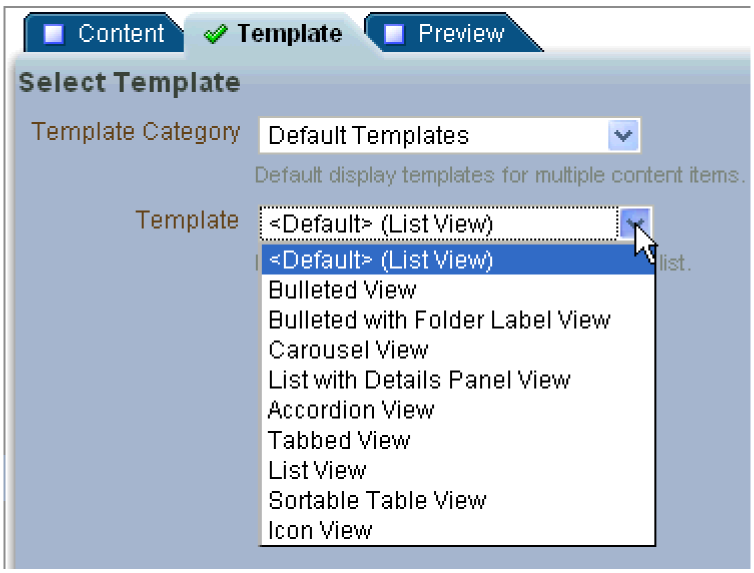


Figure 18–72 Selecting the Display Template (for Multiple Content Items)



By default, there is only one category: **Default Templates**. This selection defines the collection of out-of-the-box templates available for multiple content items (see Table 18–9).

Other selections that may be available are custom template categories and display templates developed specifically for your WebCenter application.

Note: The selections available reflect the entries specified by your organization's template developer in `templates-registry.xml` under `<content-list-templates>`. For more information, see "Creating Custom Templates for Displaying Content Using Content Presenter" in *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter*.

Table 18–8 Out-of-the-Box Templates for Displaying Single Content Items

Single Content Item Templates	View ID in `templates-registry.xml`	Description
Default Document Details View	`oracle.webcenter.content.templates.default.document.details`	Displays detailed information about any single content item including creation date, modification date, created by username, modified by username, path and any comments.
Default List Item View	`oracle.webcenter.content.templates.default.list.item`	Used by multiple content item views to display each individual item. Displays a single line with an icon and item name as a link that either displays or downloads the item when clicked.
Default View (default when no template is selected)	`oracle.webcenter.content.templates.default.detail`	Displays any single content item, either directly in the browser (images, HTML) or as a link that downloads the associated file when clicked. For example, when the selected document type is .doc, the Default View template is assigned to be the Default Document Details View template.
Default List Item View for Folders	`oracle.webcenter.content.templates.default.list.item`	Not available for selection in the Content Presenter Configuration dialog, but used by other multiple content item templates to display folders as they process their content nodes. Displays a single line with a folder icon and the folder name.

Table 18–9 Out-of-the-Box Templates for Displaying Multiple Content Items

Multiple Content Item Templates	View ID in `templates-registry.xml`	Description
Accordion View	`oracle.webcenter.content.templates.default.list.panel.accordion`	Displays multiple content items in an accordion format, where each item can be expanded to display its details.
Bulleted View	`oracle.webcenter.content.templates.default.list.bulleted`	Displays multiple content items in a bulleted list format. Only content items display; folder items are omitted.
Bulleted with Folder Label View	`oracle.webcenter.content.templates.default.list.bulleted.label`	Displays multiple content items in a bulleted list format. The name of the folder containing the first item in the list will display as a label above the list. This template is intended to be used with **Content Source** set to **Contents Under a Folder** to ensure that all items have the same parent folder. Only content items display; folder items are omitted.

Table 18–9 (Cont.) Out-of-the-Box Templates for Displaying Multiple Content Items

Multiple Content Item Templates	View ID in `templates-registry.xml`	Description
Carousel View	`oracle.webcenter.content.templates.default.list.carousel`	Displays multiple content items in a carousel format, where items can be browsed by moving a slider left or right.
Icon View	`oracle.webcenter.content.templates.default.list.tile`	Displays multiple content items in a tiled format with large icons and file names.
List View (default when no template is selected)	`oracle.webcenter.content.templates.default.list.simple`	Displays multiple content items in a simple list.
List with Details Panel View	`oracle.webcenter.content.templates.default.list.details.panel`	Displays multiple content items in a list on the left, with a panel to the right displaying the details of a selected item.
Sortable Table View	`oracle.webcenter.content.templates.default.list.tabular`	Displays multiple content items in a sortable table that includes the document name, date created, and date modified.
Tabbed View	`oracle.webcenter.content.templates.default.list.panel.tabbed`	Displays multiple content items as tabs that can be selected to display item details.

9. To see a preview of your content before adding it to the page, click **Preview** or the **Preview** tab.

> **Note:** The appearance of the content on the **Preview** page is dependent on whether the selected display template uses a stretch or flow layout. While the final view of the task flow can be configured to use either a stretch layout or a flow layout, the **Preview** page only uses a flow layout. As a result, the preview of content using templates that were designed for a stretch layout will display unstretched at a fixed default size. This is the normal behavior of stretchable content when displayed in non-stretching flow layout. To allow stretchable content to stretch to its full size and fill the task flow space entirely, click the **Edit** (pencil) icon for the task flow to display the Component Properties dialog, and select the `Stretch Content` property (on the **Display Options** tab). For more information, see Table 10–1, " Display Options Properties".

> **Note:** Content Presenter does not support non-ASCII characters in files that are encoded using the non-UTF-8 character encoding. When users preview such files in Content Presenter, non-ASCII characters appear garbled.

18.4.3 Adding a File

Using the Documents service in WebCenter Spaces, you can add a new file to the connected content repository, exposing the file in a personal space or group space, as described in the following sections:

- Section 18.4.3.1, "Uploading Multiple Files"
- Section 18.4.3.2, "Uploading a Single File"
- Section 18.4.3.3, "Creating and Editing Rich Text Documents"
- Section 18.4.3.4, "Copying and Pasting Files"

Note: Other methods to add a file when the backend content repository is Oracle Content Server are:

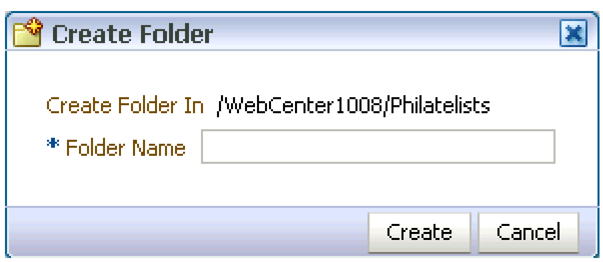
- Create a Windows network place to a personal space or group space, then use Windows Explorer to add files of any type, as described in Section 18.3, "Working with Windows Explorer Integration."
- Use the Microsoft Office shared document management functionality to save a local Microsoft Word, Excel, or PowerPoint file, or use the task pane to add files of any type to the Oracle Content Server repository, as described in Section 18.2.3.1, "Adding a File."

18.4.3.1 Uploading Multiple Files

To upload multiple files to a personal space or group space, you can use Windows Explorer, WebDAV, or the Oracle Content Server Batch Loader utility:

1. In a personal space or group space, go to the **Documents** page or a Document Manager task flow.
2. If desired, create a new folder for the documents you plan to upload (see Section 18.4.4.1, "Creating Folders Using the Create a New Folder Icon"). In the Create Folder dialog, make note of the root folder path specified by **Create Folder In** (Figure 18–73).

Figure 18–73 Create Folder dialog



Note: The root folder where your group space is stored in Oracle Content Server is `/spaces/`*`group_space_name`*; a personal space is stored in `/spaces/`*`user_name`*.

---

3. Choose any of the following methods to upload files to the personal space or group space folder:
   - To use Windows Explorer, refer to Section 18.3, "Working with Windows Explorer Integration."

- To use WebDAV, which is installed with Oracle Content Server out-of-the-box, refer to "Importing Documents for a Group Space" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter*.
- To use the Batch Loader utility, refer to the "Batchloading Content" chapter in *Managing System Settings and Processes*, available at `http://download.oracle.com/docs/cd/E10316_01/owc.htm`

18.4.3.2 Uploading a Single File

You can upload a file from any location that is accessible from your local file system to the content repository. This includes remote systems to which your local system has access.

The following sections describe how to use WebCenter Spaces to upload a file to the content repository:

- Section 18.4.3.2.1, "Uploading a File Using the Toolbar"
- Section 18.4.3.2.2, "Uploading a File Using a Menu"

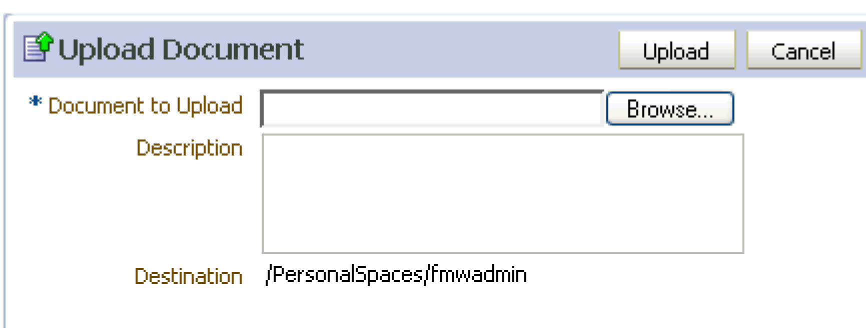
18.4.3.2.1 Uploading a File Using the Toolbar To upload a file from your file system using the toolbar:

1. In a personal space or group space, go to the **Documents** page or a Document Manager task flow.
2. Select the row of the folder into which you want to upload the file. Note that to select a folder, you should click within the folder's row and not click the folder itself.
3. On the toolbar, click the **Upload Document** icon (Figure 18–74).

Figure 18–74 Upload Document Icon on Toolbar

The **Upload Document** screen opens (Figure 18–75). All fields requiring a value are marked with an asterisk (*).

Figure 18–75 Upload Document Screen



4. Click **Browse** next to the **Document to Upload** field, and then navigate to and select the file you want to upload.
5. Optionally, provide a description of the file in the **Description** field.

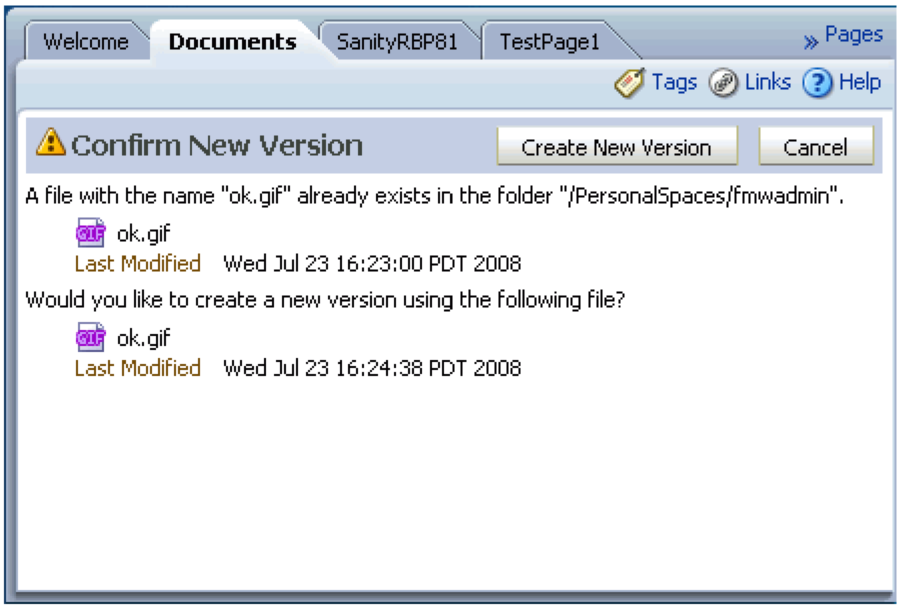
Note: The **Destination** field, which appears below the **Description** field, shows the directory path to the folder where the uploaded file will be stored.

---

6. Click **Upload** to complete the transaction.

   Where versioning is supported, a **Confirm New Version** screen opens when you upload a file with the same name as another file in the same folder (Figure 18–76).

Figure 18–76 Confirm New Version Screen



You are given the option to save the new file as a new, current version or to cancel the file upload.

18.4.3.2.2 Uploading a File Using a Menu The Document Manager task flow includes a **File** menu and context (right-click) menus for performing file and folder actions on the spot. Both the **File** menu and the folder context menu provide commands for uploading a file. This section describes how to use them.

To upload a file using the **File** menu or the folder context menu:

1. In a personal space or group space, go to the **Documents** page or a Document Manager task flow.
2. Select the target folder where you want to upload a file.
3. From either the **File** menu or the folder context menu (right-click the folder), select **New** and then **Upload Document**.

   The **Upload Document** screen opens (Figure 18–75). All fields requiring a value are marked with an asterisk (*).
4. Click **Browse** next to the **Document to Upload** field, and then navigate to and select the file you want to upload.
5. Optionally, provide a description of the file in the **Description** field.

Note: The **Destination** field, which appears below the **Description** field, shows the directory path to the folder where the uploaded file will be stored.

---

6. Click **Upload** to complete the transaction.

   Where versioning is supported, a **Confirm New Version** screen opens when you upload a file with the same name as another file in the same folder (Figure 18–76).

   You are given the option to save the new file as a new, current version or to cancel the file upload.

18.4.3.3 Creating and Editing Rich Text Documents

In addition to file upload, you can add content to a content repository through file creation. The Rich Text Editor (RTE) is a fully-integrated HTML text editor, which you can use to create your own HTML files and edit HTML files contained in the content repository.

The RTE provides basic styling features, such as selectors for font type, size, and color. It includes features for adding links, bulleted and numbered lists, and special text effects, such as subscript, superscript, strikethrough, and underline. It provides two modes—Rich Text Editing mode and Source Code mode. Use the Rich Text Editing mode to create and revise content in a WYSIWYG environment. Use the Source Code mode to enter your own HTML.

In the Documents service, the RTE is available through the Document Manager task flow.

Note: The RTE ignores the following types of tags 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>`

The following sections describe how to create and edit a file using the RTE:

- Section 18.4.3.3.1, "Creating HTML Files with the Rich Text Editor"
- Section 18.4.3.3.2, "Editing an HTML File with the Rich Text Editor"

18.4.3.3.1 Creating HTML Files with the Rich Text Editor To create HTML files using the RTE:

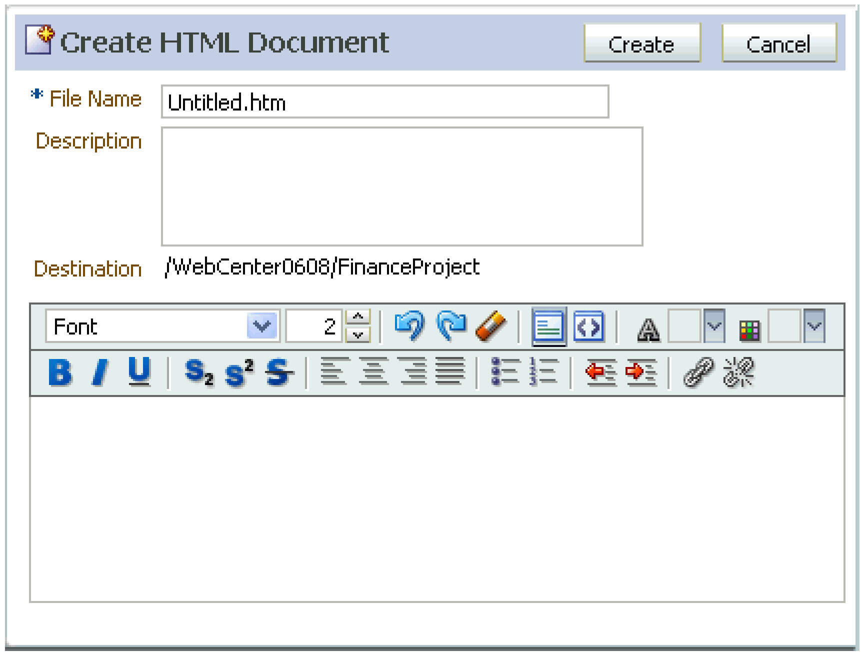
1. In a personal space or group space, go to the **Documents** page or a Document Manager task flow.
2. Click the **Create a new HTML document** icon (Figure 18–77).

Figure 18–77 Create a New HTML Document Icon on Toolbar

The RTE opens (Figure 18–78).

Fields that require a value are marked with an asterisk (*).

Figure 18–78 S



3. In the **File Name** field, enter a name for the file.

   The editor appends the extension `.htm`., unless `.htm` or `.html` is already specified.

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

   Note: The **Destination** field, which appears below the **Description** field, shows the directory path to the folder where the uploaded file will be stored.

   ---

5. Using the editor, add text, formatting, styling, and links.

   Table 18–10 lists and describes RTE controls.

Table 18–10 Rich Text Editor Controls

Control	Description
	The **Font** dropdown menu. Select a font, and enter text; or highlight text, and select a font.
	The **Font Size** selector. Select a size, and enter text; or highlight text, and select a size. Click the up arrow to increase font size. Click the down arrow to lower font size.
 **Ctrl-z**	The **Undo** icon. Click this icon to back out of the previous change. Change history is cleared when you click **Create**.
 **Ctrl-y**	The **Redo** icon. Click this icon to restore the previous change. Change history is cleared when you click **Create**.
	The **Clear Styling** icon. Select text and click the Clear Styling icon to remove all styling, such as font types, font sizes, font weights, and font colors. Note that formats, such as bulleted and indented are not affected.
	The **Rich Text Editing Mode** icon. Use this control to toggle the editor to Rich Text editing mode. In this mode, you can use the style controls at the top of the editor to design your HTML's look and feel.
	The **Source Code Editing Mode** icon. Use this control to toggle the editor to the source code editing mode. In this mode, you can enter all of your own HTML manually. This includes entering source code for the insertion of images. Source code editing mode assumes you will enter all HTML code manually; therefore, most style controls at the top of the text box are not available in this mode.

Table 18–10 (Cont.) Rich Text Editor Controls

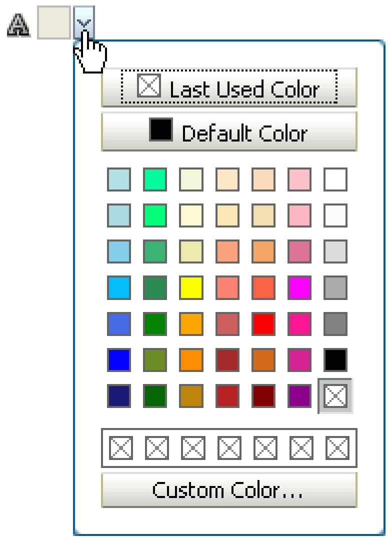
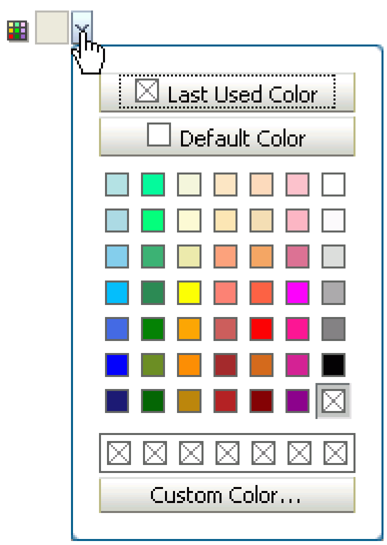
Control	Description
	**Foreground Color** selector. Use the selector to apply color to text. Pick a color, and enter text; or highlight text, and select a color.
	**Background Color** selector. Use the selector to highlight text. Select a color, and enter text; or select text and then a color to highlight.
	The **Bold** icon. Highlight text, and click this icon; or click this icon, and enter text. Click this icon again to exit Bold.
	The **Italic** icon. Highlight text, and click this icon; or click this icon, and enter text. Click this icon again to exit Italic.
	The **Underline** icon. Highlight text, and click this icon; or click this icon, and enter text. Click this icon again to exit Underline.

Table 18–10 (Cont.) Rich Text Editor Controls

Control	Description
	The **Subscript** icon. Highlight text, and click this icon to convert it to a subscript character (see icon's numeral 2 for example); or click this icon, and enter text. Click this icon again to exit Subscript.
	The **Superscript** icon. Highlight text, and click this icon to convert it to a superscript character (see icon's numeral 2 for example); or click this icon, and enter text. Click this icon again to exit Superscript.
	The **Strikethrough** icon. Highlight text, and click this icon to drawn a horizontal line through the middle of text, or click this icon and enter text. Click this icon again to exit Strikethrough.
	The **Justify Left** icon. To align text left, highlight it and click this icon. You can also click the icon and enter text.
	The **Justify Center** icon. To center text, highlight it and click this icon. You can also click the icon and enter text.
	The **Justify Right** icon. To align text right, highlight it and click this icon. You can also click the icon and enter text.
	The **Justify Full** icon. To align text on both the right and left, highlight it and click this icon. You can also click the icon and enter text.
	The **Bulleted List** icon. To create a bulleted list, start a new line, click this icon, and enter text. You can also highlight lines of text and click the icon. Start a new line, and click this icon again to exit. Alternately, exit bullet mode by clicking Enter twice at the end of the last item.
	The **Numbered List** icon. To create a numbered list, start a new line, click this icon, and enter text. You can also highlight lines of text and click the icon. To exit bullet mode, start a new line and click this icon again. Alternately, exit numbered mode by clicking Enter twice at the end of the last item.
	The **Outdent** icon. To move a block of text left, select it and click this icon.
	The **Indent** icon. To move a block of text right, select it and click this icon.
	The **Link** icon. Copy the target URL, and then click this icon and paste or enter a web address in the resulting dialog. Click **OK** in the dialog to save the link.
	The **Remove Link** icon. Highlight linked text and click this icon to remove the link.

Table 18–10 (Cont.) Rich Text Editor Controls

Control	Description
Ctrl-x	Use this key combination to delete highlighted selections. You can also press the **Backspace** and **Delete** keys on your keyboard.

6. Click **Create** to save your changes and exit the editor.

18.4.3.3.2 Editing an HTML File with the Rich Text Editor You can use the RTE to edit any HTML file that is available in a content repository. The editor is available to the files it was used to create as well as files created with other HTML authoring tools.

> **Note:** To use the RTE to edit files created with other HTML authoring tools, the HTML files must be well formed (that is, have no unclosed tags) and contain no JavaScript.
>
> The editor recognizes the file extensions `htm` and `html`.

In the Documents service, the RTE is available in the Document Manager task flow.

To edit an HTML file using the RTE:

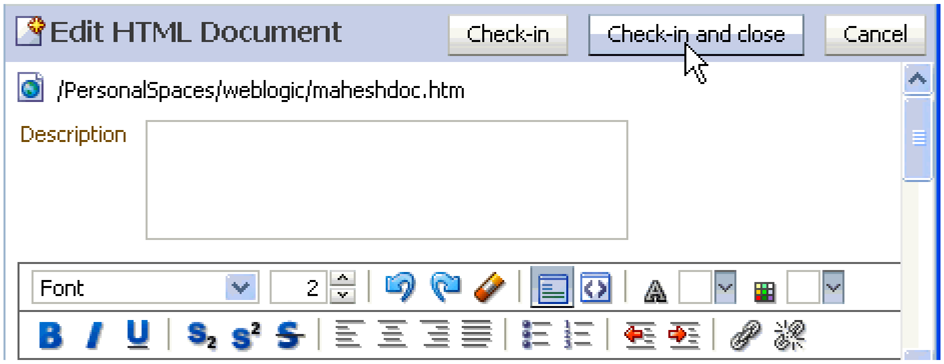
1. In a personal space or group space, go to the **Documents** page or a Document Manager task flow.
2. Check the HTML file out (see Section 18.4.6.2.1, "Checking a File Out"). The file *must* be checked out before it can be edited to ensure that your work does not conflict with others who may be editing the same file.
3. Select the HTML file by clicking in its row, and click the **Edit with Rich Text Editor** icon on the toolbar (Figure 18–79). This icon is inactive until after the file is checked out.

Figure 18–79 Edit with Rich Text Editor Icon on Toolbar

   The file opens in the RTE (Figure 18–78). The editor recognizes the file extensions `htm` and `html`.

4. Use the RTE controls (see Table 18–10) to revise the file, or edit the file in Source Code mode to revise the HTML source.
5. When you complete your revisions, click **Check-in and close** (Figure 18–80) to save your changes and exit the RTE. To discard your changes, click **Cancel** and check the file back in.

Figure 18–80 Checking in Edited File and Closing Rich Text Editor



18.4.3.4 Copying and Pasting Files

The Documents service provides three options for copying and pasting files:

- Toolbar options
- Menu options
- Drag-and-drop
  - Dragging and dropping files is equivalent to "move" or "cut/paste".
  - Dragging and dropping while pressing the Ctrl key is equivalent to "copy/paste".

This section describes how to copy and paste files in a personal space or group space using the toolbar and menus:

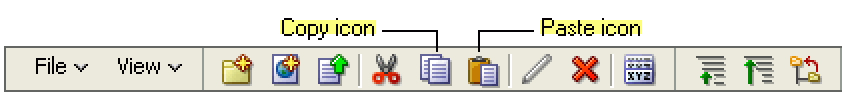
- Section 18.4.3.4.1, "Copying and Pasting Files Using the Toolbar"
- Section 18.4.3.4.2, "Copying and Pasting Files Using a Menu"

18.4.3.4.1 Copying and Pasting Files Using the Toolbar To copy and paste one or multiple files using the toolbar:

1. In a personal space or group space, go to the **Documents** page or a Document Manager task flow.
2. Locate and select the file(s) you want to copy.

   To select one file without opening it, click within the file row. To select multiple files, Ctrl-click the file rows.
3. On the toolbar, click the **Copy** icon (Figure 18–81).

Figure 18–81 Copy and Paste Icons on Toolbar



4. Select the folder where you want to paste the copied file(s).

   To select a folder, click in the folder's row. Clicking on the folder name produces a different result (see Section 18.4.5.2, "Opening a Folder").
5. On the toolbar, click the **Paste** icon (Figure 18–81).

   The copied file(s) are added to the selected folder.

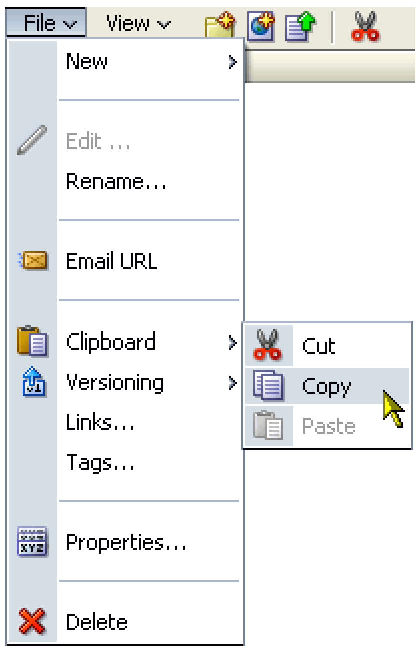
18.4.3.4.2 Copying and Pasting Files Using a Menu There are two menus to choose from when copying and pasting: the **File** menu and a context (right-click) menu.

To copy and paste files using the **File** menu or a file or folder context menu:

1. In a personal space or group space, go to the **Documents** page or a Document Manager task flow.
2. Locate and select the file(s) you want to copy.

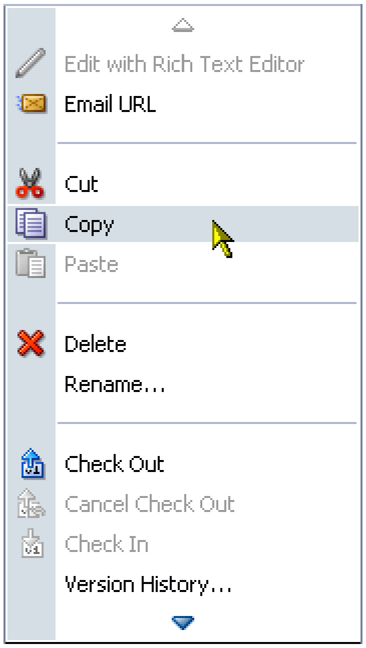
   To select one file without opening it, click in the file row. To select multiple files, Ctrl-click the file rows. Clicking on the file name opens the file (see Section 18.4.5.1, "Opening a File").
3. Open the **File** menu and choose **Clipboard** and then **Copy** (Figure 18–82).

Figure 18–82 Copy Command on File Menu



As an alternative, right-click a file icon or in a file row and select **Copy** (Figure 18–83).

Figure 18–83 Copy Command on File Context Menu



4. Select the folder where you want to paste the copied file(s).

   Select a folder by clicking its icon or in its row. Clicking a folder name opens the folder (see Section 18.4.5.2, "Opening a Folder").

5. From the **File** menu, choose **Clipboard** and then **Paste**.

   As an alternative, right-click the target folder icon or in the target folder's row, and select **Paste**.

   The copied file(s) are added to the selected folder.

18.4.4 Creating and Copying Folders

Folders provide a convenient way to organize the content exposed through the Documents service. The Document Manager and Document List Viewer task flows include the capability to display folders, but only the Document Manager task flow includes the capability of creating and copying them.

The following sections describe how to create and copy folders in WebCenter Spaces:

- Section 18.4.4.1, "Creating Folders Using the Create a New Folder Icon"
- Section 18.4.4.2, "Copying a Folder and Its Content"

Note: Other methods to create and copy folders when the backend content repository is Oracle Content Server are:

- Create a network place to a personal space or group space, then use Windows Explorer to create and copy folders, as described in Section 18.3, "Working with Windows Explorer Integration."
- Use the Microsoft Office shared document management functionality to create a new folder in a personal space or group space, as described in Section 18.2.3.2, "Adding a New Folder."

18.4.4.1 Creating Folders Using the Create a New Folder Icon

This section describes how to create a folder in the Document Manager task flow.

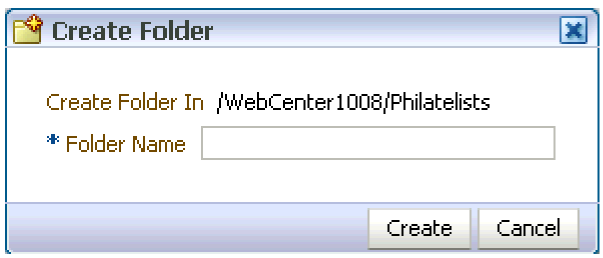
To create a folder using the **Create a new folder** icon:

1. In a personal space or group space, go to the **Documents** page or a Document Manager task flow.
2. Select the folder under which to create the new folder, and click the **Create a new folder** icon (Figure 18–84) on the toolbar.

Figure 18–84 Create a New Folder Icon on Toolbar

The Create Folder dialog opens (Figure 18–85).

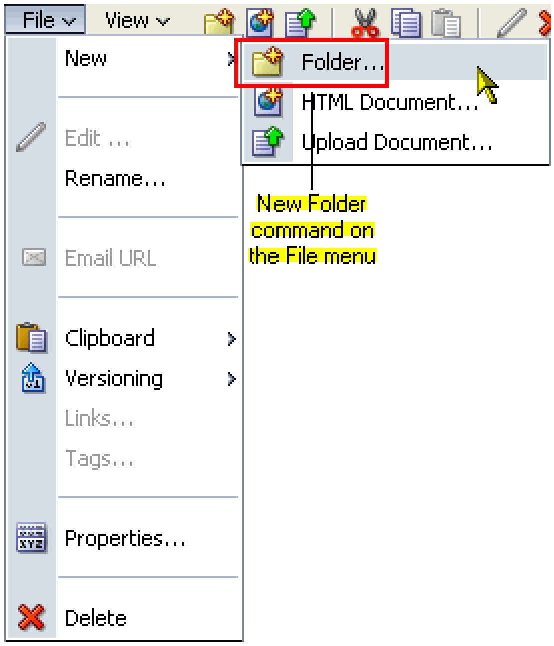
Figure 18–85 Create Folder Dialog



3. In the **Folder Name** field, enter a name for the folder; for example, `Design Specs`.
4. Click **Create** to create the folder and close the dialog.

The **File** menu also provides an option for creating a new folder, as does the folder context (right-click) menu. Choose **New**, then **Folder** (Figure 18–86).

Figure 18–86 New Folder Command on the File Menu



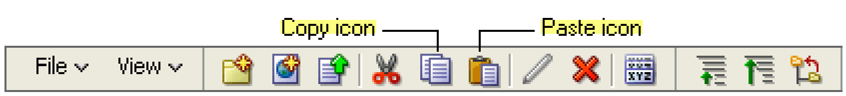
18.4.4.2 Copying a Folder and Its Content

When you copy a folder that contains content, such as subfolders and files, the content is copied as well.

To copy a folder and its content:

1. In a personal space or group space, go to the **Documents** page or a Document Manager task flow.
2. Select the folder you want to copy, and click the **Copy** icon (Figure 18–87) on the toolbar.
3. Select a destination folder where you want to paste the copy, and then click the **Paste** icon (Figure 18–87) on the toolbar.

Figure 18–87 Copy and Paste Icons on Toolbar

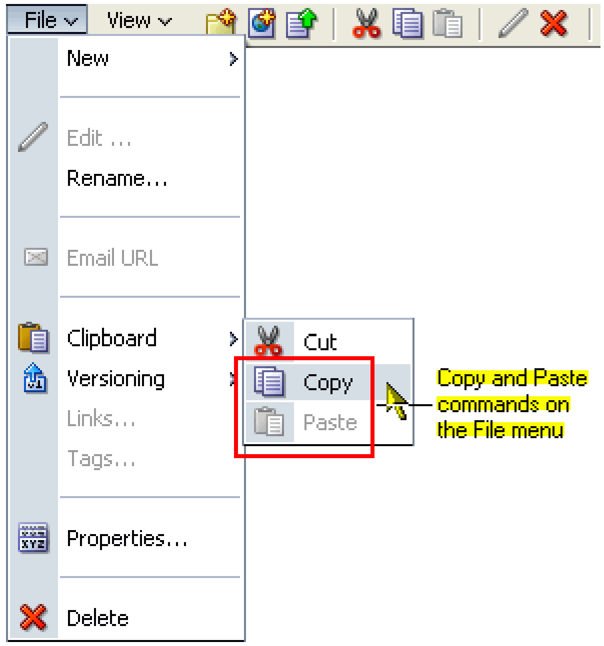


The copied folder and content display in the selected destination folder.

Note: To rename the copy, see Section 18.4.6.4, "Renaming Files and Folders."

Copy and **Paste** commands are also available on the task flow's **File** menu. Choose **Clipboard**, then **Copy** and/or **Paste** (Figure 18–88).

Figure 18–88 Copy and Paste Commands on File Menu



Additionally, you can find the **Copy** and **Paste** commands on the folder context (right-click) menu.

18.4.5 Opening Files and Folders

With appropriate permissions, you can open *files* of any type in all Documents service task flows. Opening *folders* is available to all Documents service task flows except the Recent Documents task flow, which does not display folders.

This section describes how to open files and folders using the WebCenter Spaces application:

- Section 18.4.5.1, "Opening a File"
- Section 18.4.5.2, "Opening a Folder"

Note: Other methods to open files and folders when the backend content repository is Oracle Content Server are:

- Create a network place to a personal space or group space, then use Windows Explorer to open files and folders, as described in Section 18.3, "Working with Windows Explorer Integration."
- Use the Microsoft Office shared document management functionality to open Microsoft Word, Excel, or PowerPoint files and folders in a personal space or group space, as described in Section 18.2.1, "Opening a File" and Section 18.2.3.7, "Managing Folders."

18.4.5.1 Opening a File

To open a file:

1. In a personal space or group space, go to the **Documents** page or a Documents service task flow.
2. Depending on the file type, perform the actions in Table 18–11 to produce the intended result.

Table 18–11 Opening Files in a Documents Service Task Flow

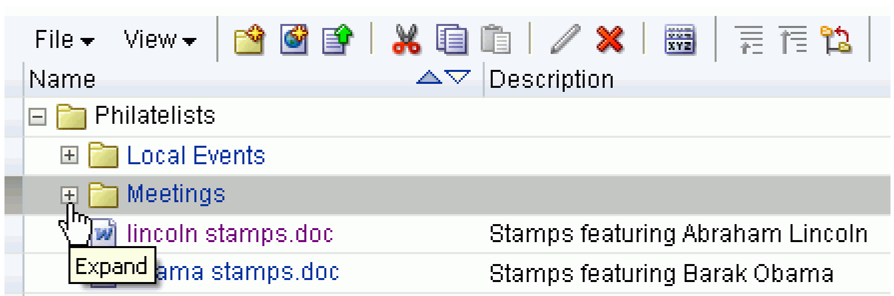
File Type	Action	Result
All	Right-click file name	Displays browser context menu to allow actions such as saving the file to your local drive.
Microsoft Office (Word, Excel, PowerPoint,Visio, MS Project)	Click file name.	Displays a dialog with options to view the file in its native application, outside WebCenter, or save the file to your local drive. **Note:** To open Microsoft Word, Excel, or PowerPoint files using Microsoft Office shared document management funtionality, see Section 18.2.1, "Opening a File."
HTML (`.htm`, `.html`), text (`.txt`), image (`.jpg`, `.gif`), XML (`.xml`)	Click file name.	Opens in browser.
Zip files (`.zip`)	Click file name.	Displays a dialog with options to view the file in its native application, outside WebCenter, or save the file to your local drive.

18.4.5.2 Opening a Folder

To open a folder:

1. In a personal space or group space, go to the **Documents** page or a Documents service task flow (except for the Recent Documents task flow, which does not expose folders).
2. Do either of the following:
   - Expand the folder node by clicking the **Expand** icon (Figure 18–89) to view a hierarchical list of the folder's content.

Figure 18–89 Expand Icon on a Folder



   - Click the folder name (Figure 18–90) to display the folder as the top-level folder in the task flow (Figure 18–91), which also makes the folder the *current location* (see Section 18.1.6, "Understanding the Document Manager Task Flow").

Figure 18–90 Subfolder (Meetings) of Root Folder (Philatelists) in a Content Repository

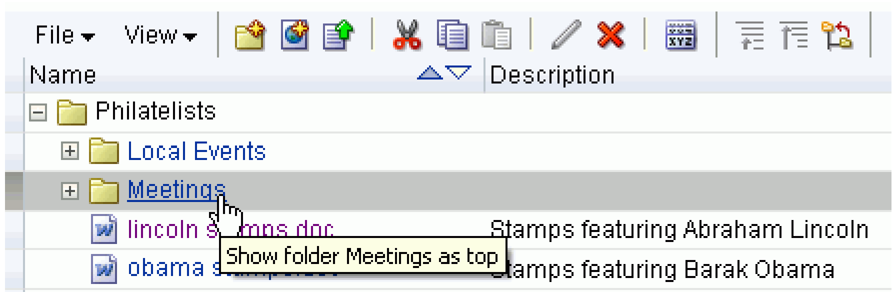
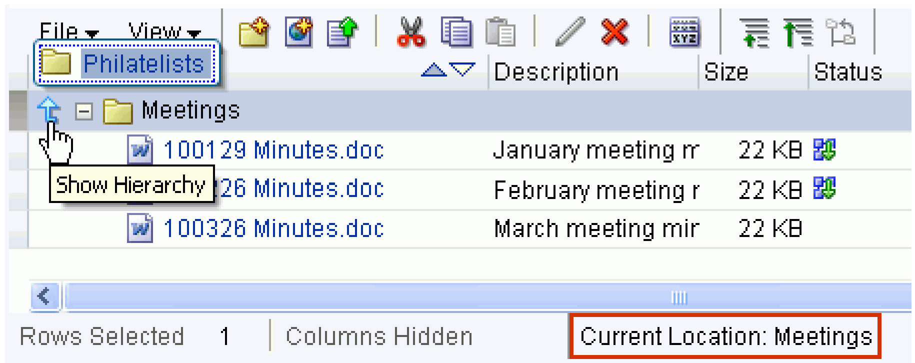


Figure 18–91 Subfolder Displayed as Top-Level Folder



Click the **Show Hierarchy** icon to the left of the folder (Figure 18–91) to open a selection list of folders higher up the folder hierarchy.

Click a folder in the hierarchy list to display it as the top-level folder. Clicking the first folder in the list (the root folder) returns you to the default folder display mode.

18.4.6 Managing Files and Folders in a Document Manager Task Flow

The Document Mananger task flow provides useful features for managing the files and folders in a personal space or group space. These include tools for navigating the folder hierarchy, creating folders and subfolders; renaming, rearranging, and deleting files and folders; and checking files out and in.

The following sections describe how to use the Document Manager task flow to manage the files and folders in a personal space or group space:

- Section 18.4.6.1, "Navigating to Files and Folders"
- Section 18.4.6.2, "Checking a File Out or In"
- Section 18.4.6.3, "Viewing File and Folder Properties"
- Section 18.4.6.4, "Renaming Files and Folders"
- Section 18.4.6.5, "Moving Files and Folders"
- Section 18.4.6.6, "Working with File Version Histories"
- Section 18.4.6.7, "Deleting Files and Folders"
- Section 18.4.6.8, "Reviewing and Collaborating on Documents"

Note: To use Windows Explorer to manage files and folders in a personal space or group space when the backend content repository is Oracle Content Server, see Section 18.3, "Working with Windows Explorer Integration."

18.4.6.1 Navigating to Files and Folders

Navigating to files and folders in the Document Manager task flow is the same as in all Documents service task flow. For more information, see Section 18.4.5, "Opening Files and Folders."

18.4.6.2 Checking a File Out or In

When you want to retain exclusive use of a file—for example, when you're editing it—you must check the file out. This prevents a file you are working on from being overwritten. Other WebCenter Spaces 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.

When you're ready to release the file, you can either check it back in or cancel file check out. Checking a file back in involves uploading the revised file. Cancelling check out removes the file's checked out status without requiring a file upload.

The following sections describe how to check a file out, cancel file check out, and check in a file using WebCenter Spaces:

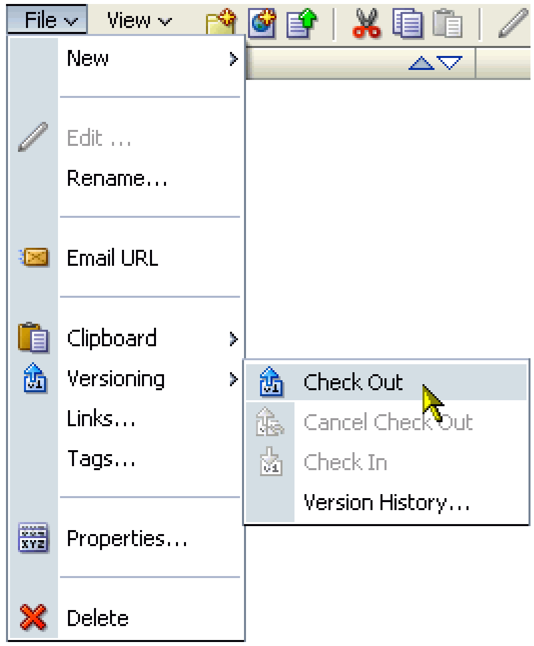
- Section 18.4.6.2.1, "Checking a File Out"
- Section 18.4.6.2.2, "Canceling File Check Out"
- Section 18.4.6.2.3, "Checking a File In"

Note: To use the Microsoft Office shared document management functionality to check a Microsoft Word, Excel, or PowerPoint file out or in when the backend content repository is Oracle Content Server, see Section 18.2.3.3, "Checking a File Out" and Section 18.2.3.4, "Checking a File In."

18.4.6.2.1 Checking a File Out To check a file out:

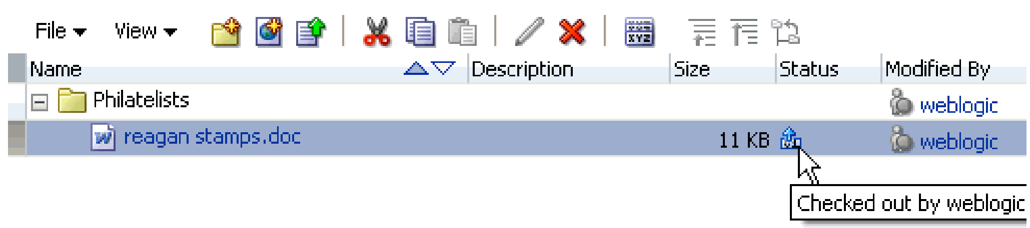
1. In a personal space or group space, go to the **Documents** page or a Document Manager task flow.
2. Select the file you want to check out by clicking in its row.
3. From the **File** menu, choose **Versioning** and then **Check Out** (Figure 18–92).

Figure 18–92 Check Out Option on File Menu



In the Document Manager task flow, a **Checked Out** icon appears in the file's **Status** column. Roll your mouse pointer over the icon to see details about the user who has checked the file out (Figure 18–93).

Figure 18–93 Checked Out Icon with Details



> **Tip:** If the **Checked Out** icon does not display immediately, click the task flow's **Refresh** icon.

18.4.6.2.2 Canceling File Check Out There may be times when you want to cancel a file check out without checking a new version of the file in.

To cancel file check out:

1. In a personal space or group space, go to the **Documents** page or a Document Manager task flows.
2. Right-click the checked out file, then choose **Cancel Check Out**.
3. Click the Refresh icon to confirm that the **Checked Out** icon no longer appears in the file's **Status** column.

18.4.6.2.3 Checking a File In When you edit an HTML file using the RTE (see Section 18.4.3.3.2, "Editing an HTML File with the Rich Text Editor"), the RTE provides buttons that you click to check the changed file back in and close the RTE. Thus, for an HTML file that you have edited directly with the RTE, there is no need to separately check the file back in as you cannot exit the RTE without checking the file in, or canceling changes you have made.

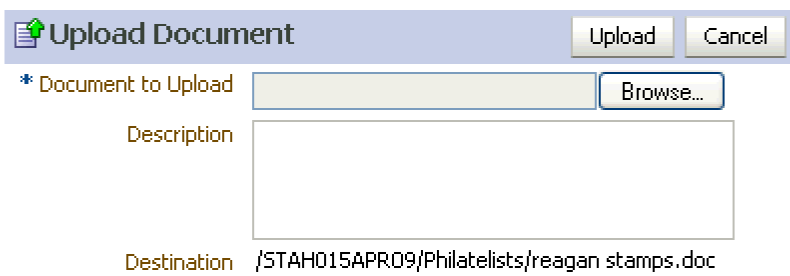
On the other hand, if you want to replace the contents of a file that is checked out with the contents of a file that you have saved on your local computer, you can do so by checking the file in, specifying the name of the file that contains the changed content.

To check a file in:

1. In a personal space or group space, go to the **Documents** page or a Document Manager task flow.
2. Right-click in the file's row, but not on the file name, and choose **Check In**.

   The **Upload Document** screen opens (Figure 18–94).

Figure 18–94 Upload Document Screen



3. Click **Browse**, and navigate to the file that contains the content to replace the contents of the checked-out file. The file name may be different or the same as the name of the checked-out file.

   Note: The default maximum size for an uploaded file is 2 GB (to change this limit, see "Changing the Maximum File Upload Size" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter*).

   ---

4. Optionally, enter a description in the **Description** field.
5. Click **Upload**.

   The file is uploaded and checked in with the revised content. The **Checked Out** icon no longer appears in the **Status** column.

18.4.6.3 Viewing File and Folder Properties

File and folder properties provide access to informational details about a selected file or folder. You can use file properties to rename a file, provide or revise a file description, or obtain a reusable link to the file. Additionally, both file and folder properties provide read-only information about location, type, and create and modification dates. File and folder properties also provide contact points to the users who created or last modified the file or folder.

To view file and folder properties:

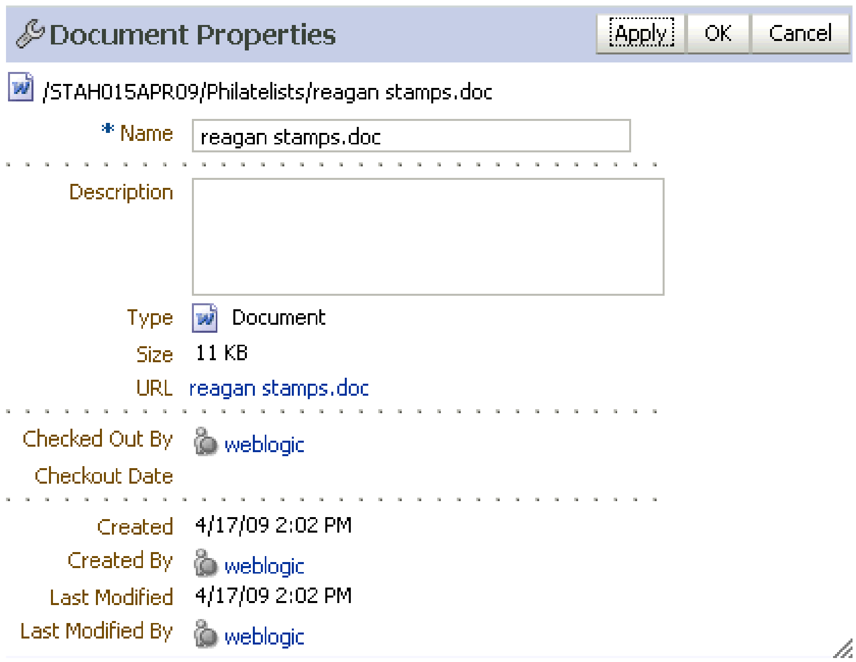
1. In a personal space or group space, go to the **Documents** page or a Document Manager task flow.

2. Select the file or folder whose properties you want to view, and click the **Properties** icon on the toolbar (Figure 18–95).

Figure 18–95 Properties Icon on Toolbar

The **Document Properties** (Figure 18–96) or **Folder Properties** screen opens:

Figure 18–96 Document Properties Screen



3. Click **OK** to exit the **Document Properties** or **Folder Properties** screen and return to the Document Manager task flow.

18.4.6.4 Renaming Files and Folders

You can use menus and properties to rename files and folders. For example, on the **File** menu and on file and folder context (right-click) menus, you can choose **Rename**. You can also rename a file through its properties.

The following sections describe how to rename files and folders using a menu and how to rename a file and revise its description through document properties:

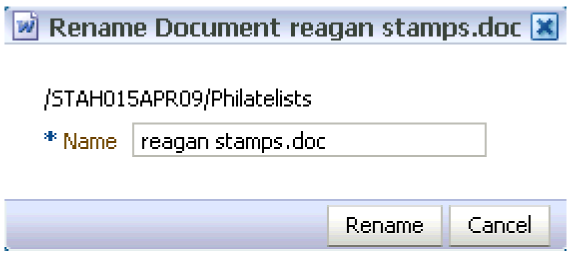
- Section 18.4.6.4.1, "Renaming a File or Folder Through a Menu"
- Section 18.4.6.4.2, "Renaming a File and Revising Its Description Through Properties"

Note: To use Windows Explorer to rename files and folders in a personal space or group space when the backend content repository is Oracle Content Server, see Section 18.3, "Working with Windows Explorer Integration."

18.4.6.4.1 Renaming a File or Folder Through a Menu To rename a file or folder using a context menu:

1. In a personal space or group space, go to the **Documents** page or a Document Manager task flow.
2. Right-click the file or folder icon or within the file or folder row, and choose **Rename**.
3. In the resulting dialog (Figure 18–97), enter a new name in the **Name** field.

Figure 18–97 Rename Document Dialog



4. Click **Rename** button.

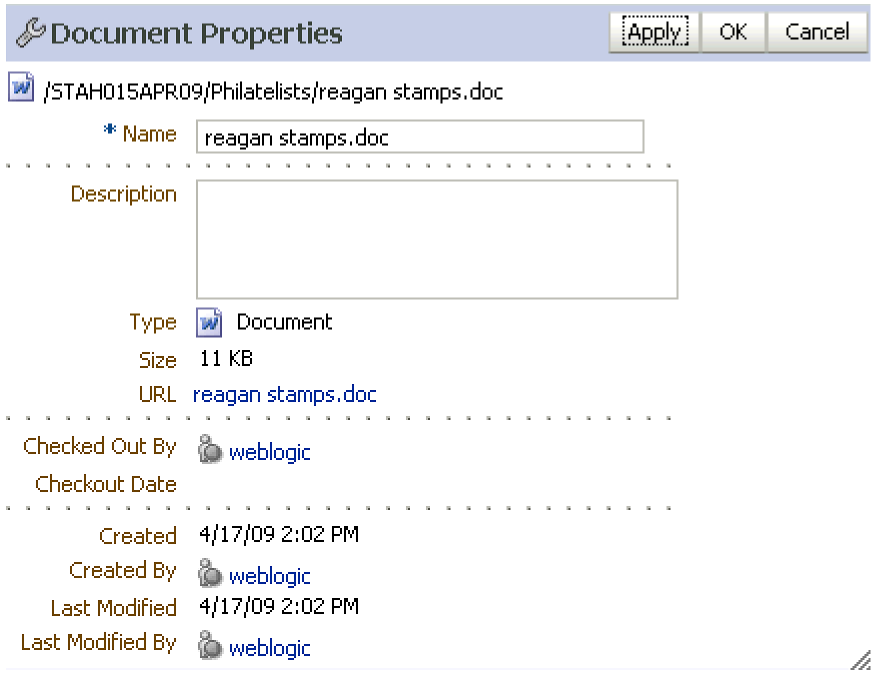
18.4.6.4.2 Renaming a File and Revising Its Description Through Properties To rename a file or revise its description through its properties:

1. In a personal space or group space, go to the **Documents** page or a Document Manager task flow.
2. Select a file by clicking in its row.
3. On the toolbar, click the **Properties** icon (Figure 18–98).

Figure 18–98 Properties Icon on the Toolbar

The **Document Properties** screen opens (Figure 18–99).

Figure 18–99 Document Properties Screen



4. Revise the file name and description as desired, and click **OK**.

18.4.6.5 Moving Files and Folders

In the Document Manager task flow, you can move files and folders into other folders by cutting-and-pasting as well as by dragging-and-dropping. You can use the **Clipboard** option on the **File** menu or the **Cut** and **Paste** options on the context (right-click) menus to cut and paste files and folders.

Note: To use Windows Explorer to move files and folders in a personal space or group space when the backend content repository is Oracle Content Server, see Section 18.3, "Working with Windows Explorer Integration."

To move files and folders by dragging and dropping:

1. In a personal space or group space, go to the **Documents** page or a Document Manager task flow.
2. Click and hold the object you want to move.
3. Drag the object over the target folder (Figure 18–100).

Figure 18–100 Dragging Coffee.png Over Public Folder

4. Release the object onto the target folder.

18.4.6.6 Working with File Version Histories

Whenever you check in a file or upload a file into a folder that already contains a file of the same name, WebCenter Spaces creates a new version of the file. When a file has multiple versions, it has a version history.

The following sections describe 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:

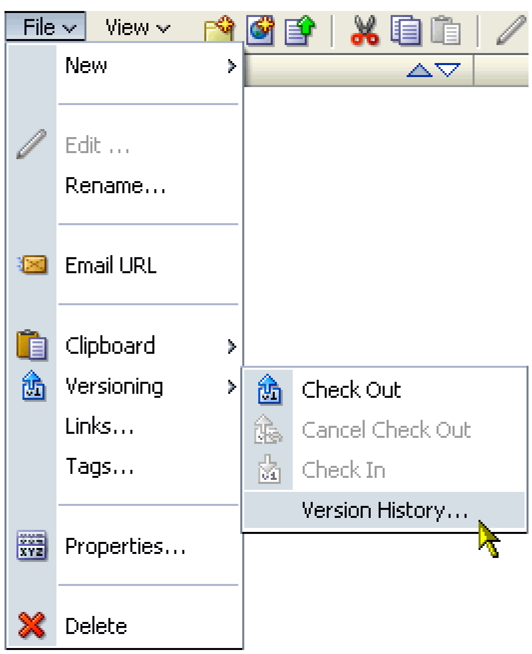
- Section 18.4.6.6.1, "Viewing a File Version History"
- Section 18.4.6.6.2, "Deleting a File Version"

Note: To use the Microsoft Office shared document management functionality to work with a Microsoft Word, Excel, or PowerPoint file's version history, see Section 18.2.3.10, "Working with File Version Histories."

18.4.6.6.1 Viewing a File Version History To view a file's version history:

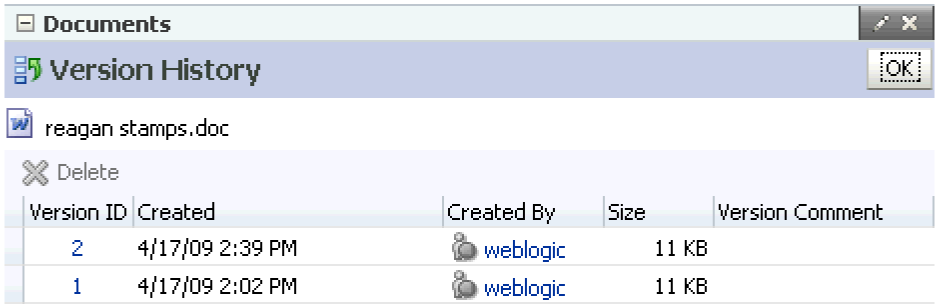
1. In a personal space or group space, go to the **Documents** page or a Document Manager task flow.
2. Select the file by clicking in its row.
3. From the **File** menu, choose **Versioning** and then **Version History** (Figure 18–101).

Figure 18–101 Version History Option Under Versioning on File Menu



The Version History screen opens (Figure 18–102).

Figure 18–102 Version History Screen



To view a particular version, click its ID number in the **Version ID** column. Depending on both the file and browser type, the file opens on a new browser tab or you will be given the opportunity to download the file.

4. Click **OK** to exit the screen and return to the Document Manager task flow.

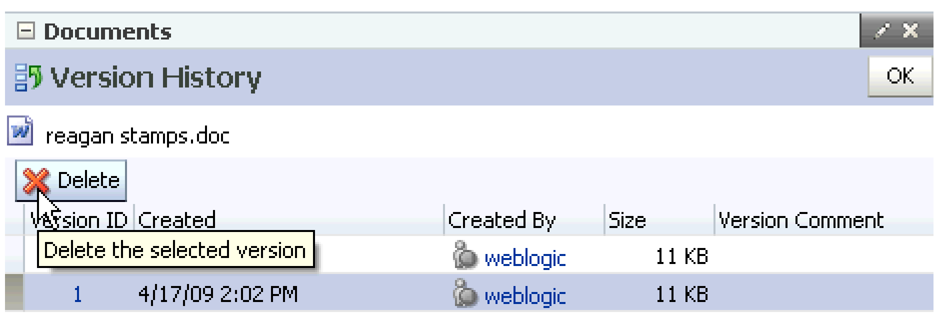
18.4.6.6.2 Deleting a File Version When you view version history, you can also select to delete one or more file versions.

To delete a file version:

1. In a personal space or group space, go to the **Documents** page or a Document Manager task flow.
2. Select the file by clicking in its row.
3. From the **File** menu, choose **Versioning** and then **Version History** (Figure 18–101).

   The Version History screen opens (Figure 18–102).
4. Select the version you want to delete by clicking in its row, and then click **Delete** (Figure 18–103).

Figure 18–103 Delete Button on the Version History Screen



5. Click **OK** to exit the screen.

18.4.6.7 Deleting Files and Folders

When you delete a folder, all the subfolders and files the folder contains are also deleted in the content repository. You can use both the toolbar and menu options in the Document Manager task flow to delete files and folders. This section describes how to delete files and folders using the **Delete** icon on the toolbar.

Note: The root folder of the task flow cannot be deleted.

To delete files and folders:

1. In a personal space or group space, go to the **Documents** page or a Document Manager task flow.
2. Select the file or folder you want to delete by clicking its icon or in its row.

   To make multiple selections, Ctrl-click each selection.
3. On the toolbar, click the **Delete** icon (Figure 18–104).

Figure 18–104 Delete Icon on Toolbar

4. Click **Delete** in the confirmation dialog.

   Your selection is deleted.

The **File** menu and the file and folder context (right-click) menus also provide a **Delete** option.

18.4.6.8 Reviewing and Collaborating on Documents

Oracle AutoVue, packaged separately from WebCenter Spaces, integrates easily with an Oracle Content Server back-end repository to provide document review and collaboration features. When AutoVue is installed on Oracle Content Server, it is exposed through the Document Manager task flow as an icon in the Document Manager toolbar (Figure 18–105).

Figure 18–105 AutoVue Icon

Additionally, options appear on both the **File** menu and the file context menu.

Select a file, and click the AutoVue icon (or from the **File** menu, select **AutoVue**) to open the file in the AutoView file viewer, where you can provide comments and individualized mark-up.

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 `http://www.oracle.com/applications/autovue/index.html`.

18.4.7 Sharing Content Using a Document Manager Task Flow

Making content available to multiple users allows for sharing and collaboration. In a WebCenter Spaces application, or custom WebCenter applications, this is easy to accomplish.

To share content:

1. Add the content to a page:
   - If the file does not exist in the content repository, add a Document Manager task flow containing a target parent folder to a page (see Section 10.1.4, "Adding Task Flows to a Page"), then upload the file from its current location

to the parent folder in the task flow (see Section 18.4.3.2, "Uploading a Single File").

- If the file already exists in the content repository, simply add a Document Manager task flow containing the file to a shared page (see Section 10.1.4, "Adding Task Flows to a Page").

2. Make the page containing the file available to other users (see Section 7.7, "Setting and Revoking Page Access Permissions").
3. Notify users with valid permissions that they can update the file by checking it out and in (see Section 18.4.6.2, "Checking a File Out or In").

18.4.8 Running Document Searches in the Document Manager Task Flow

In addition to the WebCenter Search service, which searches a particular space or across the entire application (see Chapter 28, "Working with the Search Service"), the Documents service provides its own search engine for file searches. A Documents service search saves time and increases the relevancy of results by narrowing the scope of a search to files.

In WebCenter Spaces, the document search searches within a specific personal space or group space root folder. Within a custom WebCenter application, the document search searches through all files to which you have access.

The document search feature is exposed in the Document Manager task flow. It provides two levels of search: Basic and Advanced. This section contains the following subsections:

- Section 18.4.8.1, "Running a Basic Document Search"
- Section 18.4.8.2, "Running an Advanced Document Search"

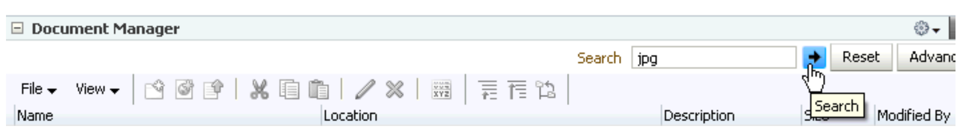
18.4.8.1 Running a Basic Document Search

A basic document search searches by full or partial names of files. For information about including file content in a search, see Section 18.4.8.2, "Running an Advanced Document Search."

To perform a basic document search:

1. In a personal space or group space, go to the **Documents** page or a Document Manager task flow.
2. Enter a search term in the search field (Figure 18–106).

Figure 18–106 Document Manager Task Flow Search Field

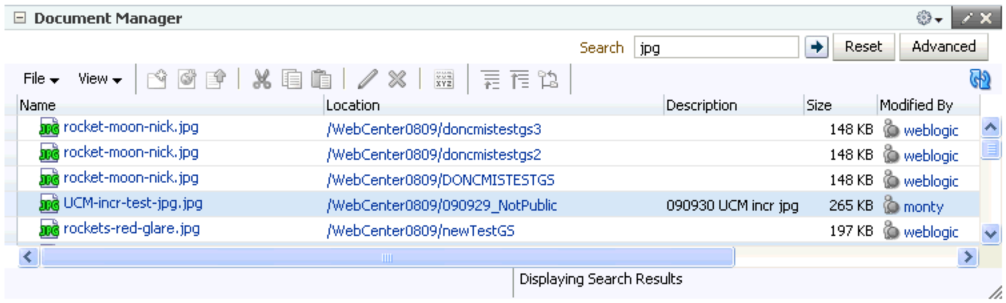


For example, enter a full or partial name of a file.

3. Click the **Search** icon.

Results of matching file names display on the search results screen, with **Displaying Search Results** indicated at the bottom (Figure 18–107).

Figure 18–107 Search Results in Document Manager Task Flow



Look in the **Location** column to determine where a file or folder is located. Alternatively, click the file display name to open it from the search results screen.

4. Click **Reset** to clear the search field and return to the Document Manager task flow default display.

18.4.8.2 Running an Advanced Document Search

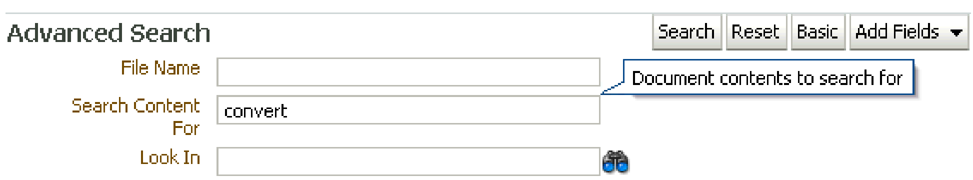
The advanced document search goes further than the basic search by including searches against file content, dates, and users. Additionally, you can narrow your search to a particular folder.

To perform an advanced document search:

1. In a personal space or group space, go to the **Documents** page or a Document Manager task flow.
2. Click **Advanced** next to the **Search** field.

   The **Advanced Search** screen opens (Figure 18–108).

Figure 18–108 Advanced Search Screen in Document Manager Task Flow



3. Enter search terms in one or more of the default fields:
   - **File Name**—Enter a full or partial file name.
   - **Search Content For**—Enter a term to search for in the content of any files in the Document Manager task flow.
     – A term is one or more words.
     – If multiple words are specified, separated by a character space, the words are implicitly "`AND`'ed" together. That is, they must both appear in a given search result.
     – Terms may also be "`OR`'ed" with explicit use of the `OR` keyword. One or the other of the specified terms must appear in a given search result.
     – `AND` has higher precedence than `OR`.
     – Special characters (such as a single quotation mark ('), a double quotation mark ("), or a hyphen (-)) are not valid in a search term.

Table 18–12 shows examples of valid search syntax with Java Content Repositories (all supported content repositories are JCRs):

Table 18–12 Search String Examples

Search String	Search Results Return All Occurrences of...
`Oracle`	`Oracle`
`Oracle WebCenter`	`Oracle` and `WebCenter`
`Oracle OR WebCenter`	`Oracle` or `WebCenter`
`Oracle WebCenter OR Spaces`	(`Oracle` and `WebCenter`) or `Spaces` (note the precedence rule)

- **Look In**—Click the **Browse** icon to open a list of content repository folders. Select one of these to narrow your search to the selected folder.

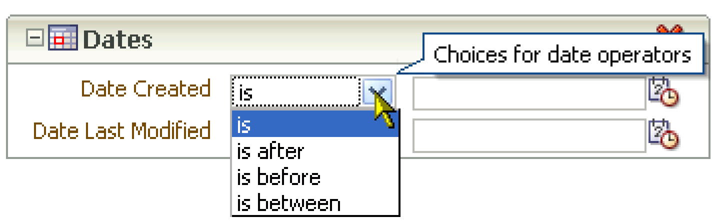
4. Optionally, select additional search criteria from the **Add Fields** dropdown list (Figure 18–109).

Figure 18–109 Add Fields Dropdown List

Add all or any of the following by selecting it from the list:

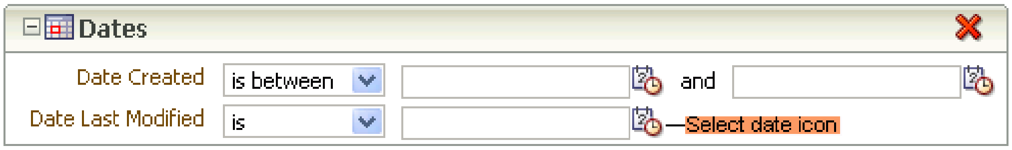
- **Dates**—Adds search fields for **Date Created** and **Date Last Modified**. You can modify the dates search criteria by selecting a modifier from the **Date Operators** dropdown list (Figure 18–110).

Figure 18–110 Date Operators Dropdown List



Select to search for an exact date (**is**), a following date (**is after**), a preceding date (**is before**), or a date between two other dates (**is between**). When you select is between, an additional date field is provided for entering the second date (Figure 18–111).

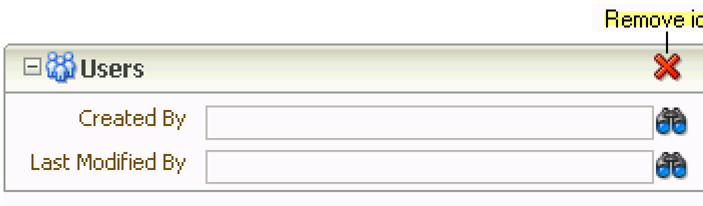
Figure 18–111 Additional Field for the is between Date Operator



Click the **Select date** icon to select a date in the correct format (`mm/dd/yyyy`), for example `6/18/2009`, or enter a date manually.

- **Users**—Adds search fields for **Created By** (user who uploaded) and **Last Modified By** (Figure 18–112).

Figure 18–112 Users Search Fields



Enter a user name for the creator or modifier, or click the **Browse** icon to the right of each field, to select from a list of users or to search for a user name. Enter—minimally—two consecutive characters from the name of your search target (the search term *do* finds both *condoleeza* and *doug*). Click **Search**, and all names matching your search criteria appear in the results area.

Note: In the WebCenter Spaces application, when you search documents in a group space, the user selection list and the user search find user names for current members of the group space.

To remove added fields, click the **Remove** icon.

5. Click **Search** to execute the advanced search.

   Results display in the task flow content area. Click **Reset** to clear the search criteria and return the Document Manager task flow to its default view.

18.5 Personalizing and Customizing Documents Service Task Flows

The Documents service supports personalizations and customizations that enable you to control task flow content and display. This section contains the following subsections:

- Section 18.5.1, "What You Should Know About Personalizing and Customizing"
- Section 18.5.2, "Personalizing Documents Service Task Flows"
- Section 18.5.3, "Customizing Documents Service Task Flows"

18.5.1 What You Should Know About Personalizing and Customizing

The main difference between personalizing and customizing Documents service task flows is the scope of people affected by such changes: personalization affects only your view of a task flow instance; customization affects all users' views.

Personalization is available to the two Documents service task flows that have a **View** menu: the Document Manager task flow and the Document List Viewer task flow. Use personalizations to change your own view of the task flow. See Section 18.5.2, "Personalizing Documents Service Task Flows."

Customization is available to the Documents service task flows that have an Edit icon: the Content Presenter task flow and the Document List Viewer task flow, and affects the display of files and folders in all users' views. See Section 18.5.3, "Customizing Documents Service Task Flows."

18.5.2 Personalizing Documents Service Task Flows

You can personalize your own view of the Document Manager and Document List Viewer task flows by hiding or showing columns and by rearranging the list of documents according to the sort order of a particular column:

- Section 18.5.2.1, "Hiding and Showing Columns"
- Section 18.5.2.2, "Reordering Columns"
- Section 18.5.2.3, "Sorting Files and Folders"

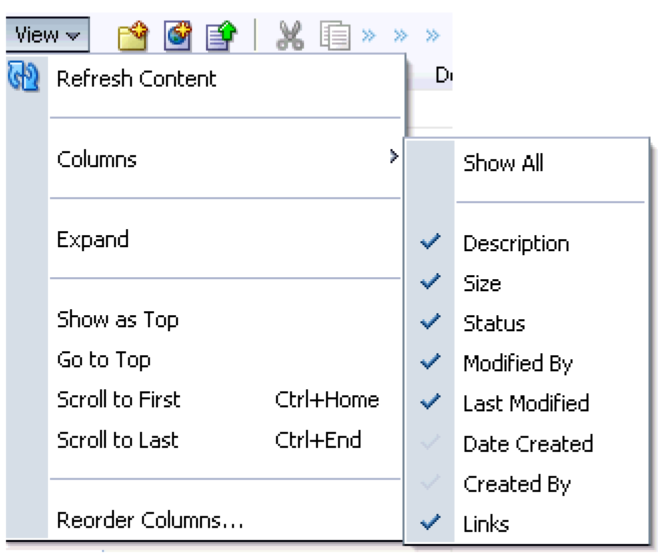
18.5.2.1 Hiding and Showing Columns

Hiding and showing one or more informational columns is useful for simplifying or expanding the details that are displayed with files and folders.

To hide or show informational columns in your unique view of a task flow:

1. In a Document Manager or Document List Viewer task flow, open the **View** menu, and click **Columns** (Figure 18–113).

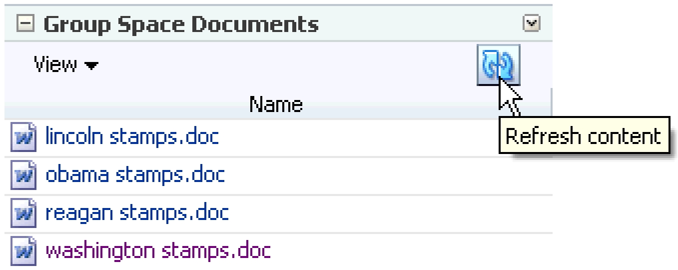
Figure 18–113 View Menu in Document Manager Task Flow



2. Select or clear individual columns to show or hide them, or select **Show All** to display all available columns.

   If changes do not display immediately, click the task flow's **Refresh content** icon (Figure 18–114).

Figure 18–114 Refresh Icon in Document List Viewer Task Flow for Group Space Documents (WebCenter Spaces Only)



18.5.2.2 Reordering Columns

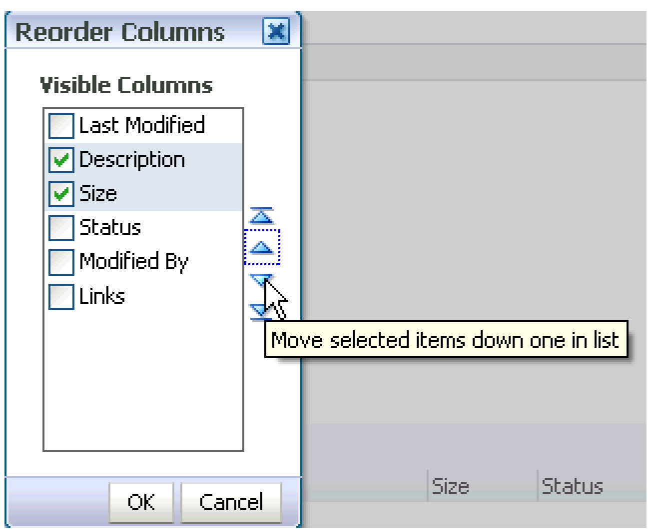
Reordering the informational columns is useful for prioritizing the details that are displayed with files and folders, depending on the information in which you are most interested.

To reorder the informational columns in your unique view of a task flow:

1. In a Document Manager or Document List Viewer task flow, open the **View** menu, and click **Reorder Columns**.

   The Reorder Columns dialog opens (Figure 18–115).

Figure 18–115 Reorder Columns Dialog



2. Select or clear one or more columns, then click the reorder icons to rearrange the order of the columns in the task flow.

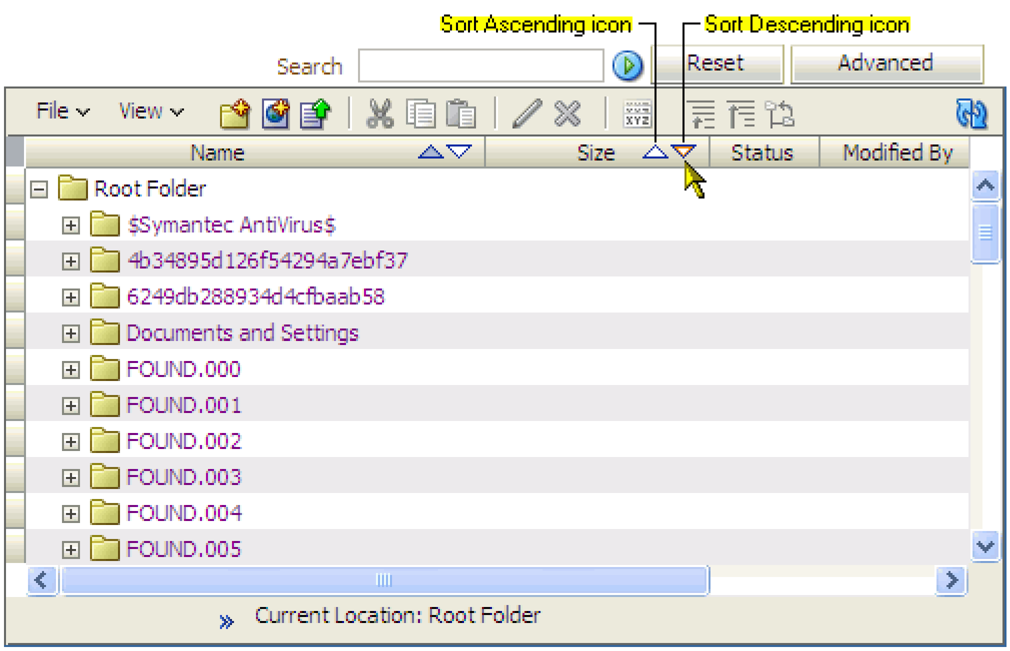
18.5.2.3 Sorting Files and Folders

Sorting columns enables you to quickly rearrange the order of the content in a Document Manager or Document List Viewer task flow. Each task flow column provides a one-click sorting feature that you can use to instantly rearrange all task flow 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 files and folders in your unique view of a task flow:

1. In a Document Manager or Document List Viewer task flow, move your cursor over the header of the column you want to use to sort files and folders.
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 18–116).

Figure 18–116 Sort Ascending and Sort Descending Icons



In the Document Manager task flow, the sorting icons display by default on the **Name** column. For other columns, the icons display when you hover your mouse pointer over the column name.

18.5.3 Customizing Documents Service Task Flows

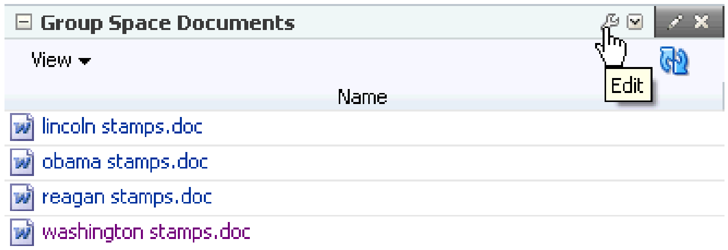
You can customize the display of files and folders in the Content Presenter or Document List Viewer task flows for all users by the results of an advanced document search, or specify the initial folder content to display when a user accesses the task flow.

Note: With sufficient privileges, you can also customize Documents service task flows using task flow *properties* to display or hide any subfolders in the selected folder, change the target location, or add filtering criteria. For general information about setting component properties, such as task flow properties, see Section 10.4, "Setting Properties on Page Content". For specific information about setting Documents service task flow properties, refer to Section 18.6, "Setting Documents Service Task Flow Properties".

To customize the display of files and folders in all users' views:

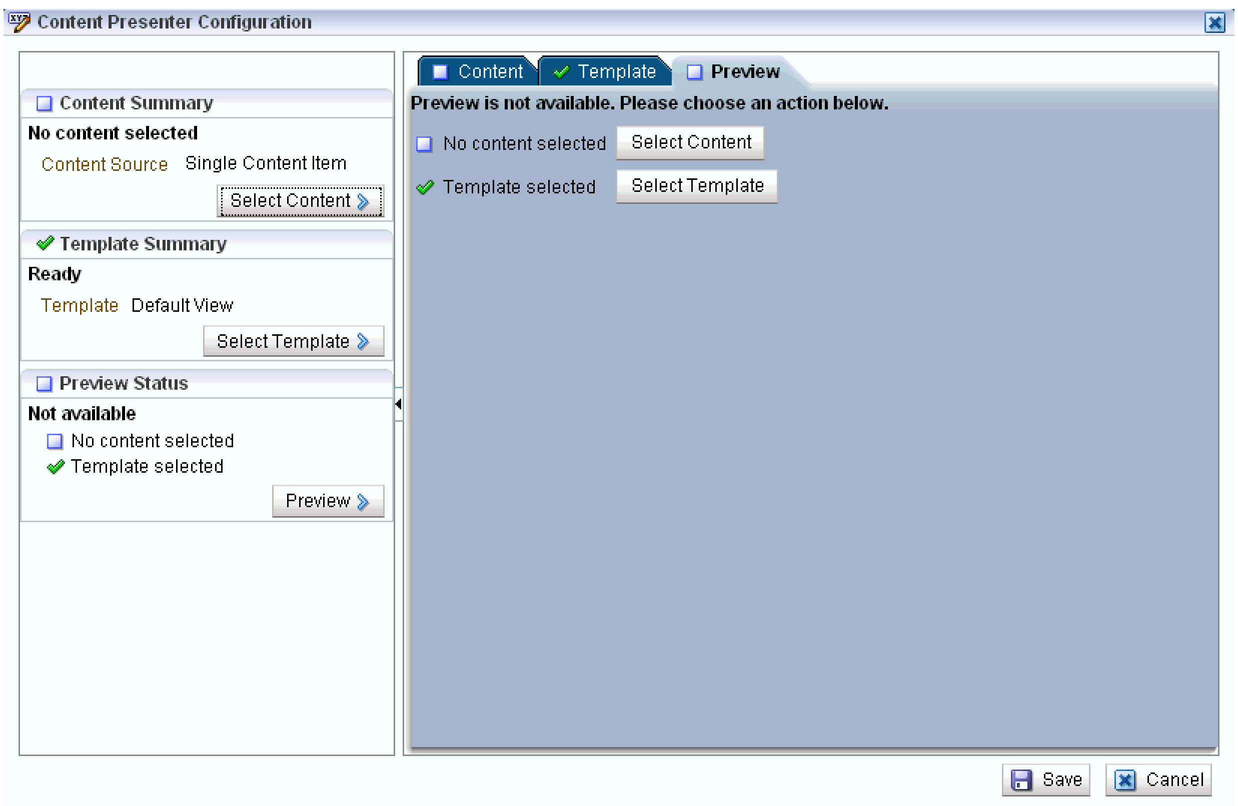
1. In the Content Presenter or Document List Viewer task flow, click the **Edit** icon in the task flow header (Figure 18–117).

Figure 18–117 Edit Icon in a Document List Viewer Task Flow in Oracle Composer



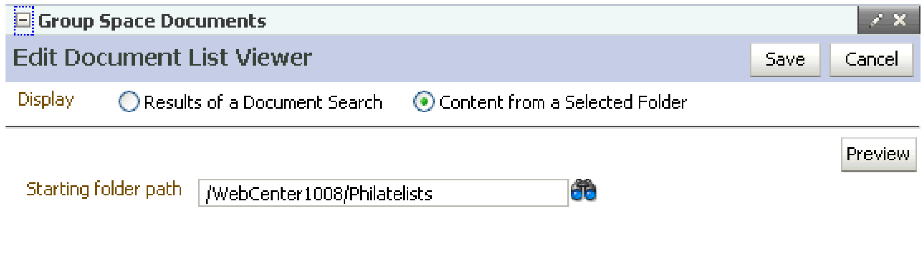
For a Content Presenter task flow, the Content Presenter Configuration dialog opens (Figure 18–62).

Figure 18–118 Content Presenter Configuration Dialog



For a Document List Viewer task flow, customization settings display (Figure 18–119).

Figure 18–119 Customization Settings in Document List Viewer Task Flow



2. For a Content Presenter task flow, refer to Section 18.4.2, "Displaying Content Using the Content Presenter Task Flow" for information about customizing the content shown in the Content Presenter task flow.

   For a Document List Viewer task flow, select a customization method:

   - **Results of a Document Search**. Enter an advanced document search, and click **Save**. For more information, see Section 18.4.8.2, "Running an Advanced Document Search."

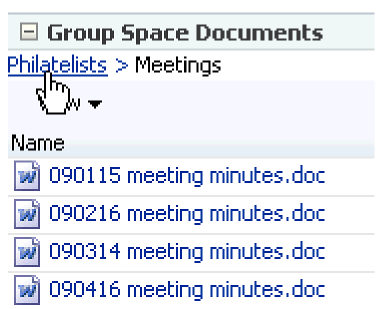
     In Oracle Composer, click **Save** and then **Close** to return to page view mode and view the results in the task flow.

   - **Content from a Selected Folder** (folders are displayed in the task flow pane only when the task flow is configured to display folders; that is, its `Show Folders` property is set to `true`). Click the **Browse** icon, navigate to and select the folder with the content you want to initially display in the task flow, then click **Save**.

     In Oracle Composer, click **Save** and then **Close** to return to page view mode and view the content of the selected folder in the task flow.

     Click the breadcrumb links to navigate up the folder hierarchy to the root folder (Figure 18–120).

Figure 18–120 Breadcrumb Navigation to Folders in a Document List Viewer Task Flow



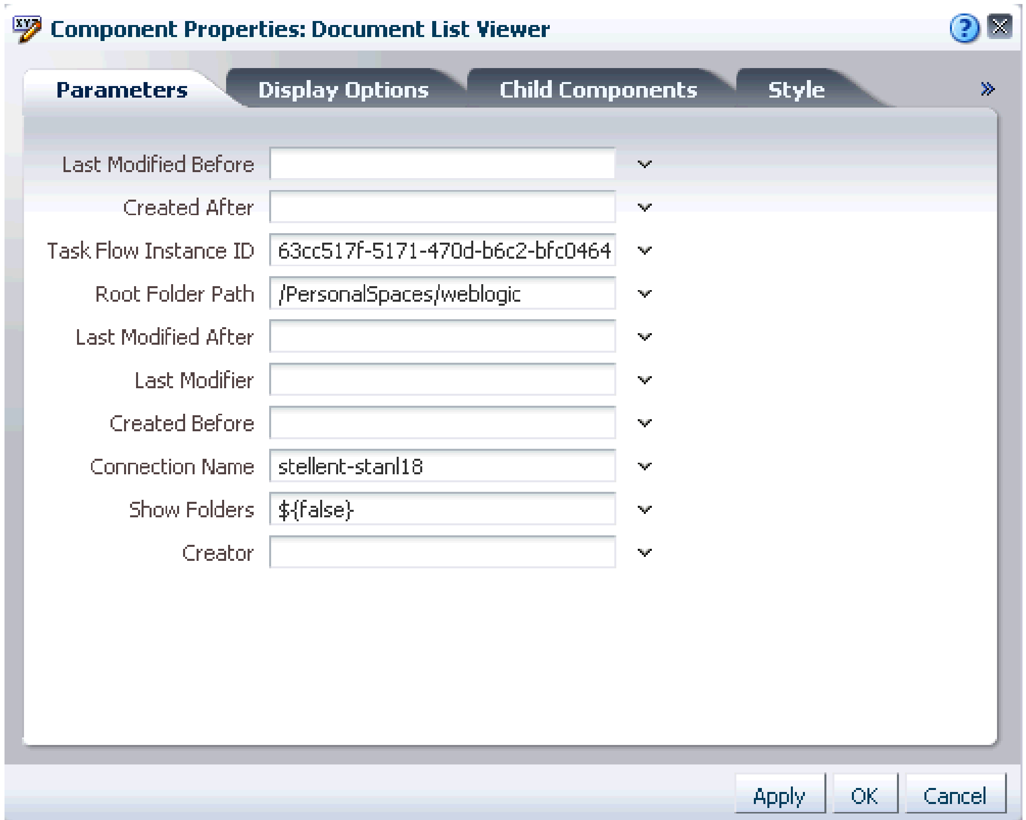
18.6 Setting Documents Service Task Flow Properties

For the steps to add a Documents service task flow to a page, see Section 18.4.1, "Adding a Documents Service Task Flow to a Page."

The Documents service task flows have associated properties, which users with sufficient privileges can access through the Component Properties dialog in Oracle Composer (Figure 18–121). Many properties are common to all task flows, and the method for accessing task flow properties is the same from task flow to task flow.

Common task flow properties and how to access them are discussed in Section 10.4, "Setting Properties on Page Content."

Figure 18–121 Document List Viewer Task Flow for Personal Documents Component Properties



The properties on the **Parameters** tab of the Component Properties dialog control the default task flow content and facilitate the wiring of the task flow to page parameters and page definition variables. These properties are unique to the task flow type. For more information, see Section 10.4.3, "Working with Component Parameters." For information about wiring pages and components, see Chapter 11, "Wiring Pages, Task Flows, Portlets, and UI Components."

Changes to the properties on the **Display Options**, **Style**, and **Content Style** tabs affect the appearance and behavior of the task flow for all users. These properties are common to all task flows. For more information, see Section 10.4.4, "Working with Component Display Options" and Section 10.4.7, "Working with Style and Content Style Properties."

The content of the **Events** tab depends on the events supported by the task flow. For more information, see Section 10.4.8, "Working with Component Contextual Events."

The **Child Components** tab displays all of the components contained within the current component. It provides controls for rearranging, showing, and hiding child components. Not all components contain children. So you may find this tab devoid of content. For more information, see Section 10.4.6, "Working with Child Components."

All properties on the **Parameters** and **Display Options** tabs provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the **Edit** icon next to a property field to open the editor. For more information about using the editor and for descriptions of common EL expressions, see Section 10.4.5, "Using Expression Language (EL) Expressions with Component Properties."

The following sections describe the properties that are unique to the Documents service:

- Section 18.6.1, "Setting Content Presenter Task Flow Properties"
- Section 18.6.2, "Setting Document Manager Task Flow Properties"
- Section 18.6.3, "Setting Document List Viewer Task Flow Properties"
- Section 18.6.4, "Setting Recent Documents Task Flow Properties"
- Section 18.6.5, "Setting Documents Service Properties on the Display Options Tab"

18.6.1 Setting Content Presenter Task Flow Properties

To select the content and template for a Content Presenter task flow instance on a page, use the Content Presenter Configuration dialog (as described in Section 18.4.2, "Displaying Content Using the Content Presenter Task Flow").

The Content Presenter properties are intended for use at design time by developers creating a custom WebCenter application (see "Adding Documents Service Task Flows at Design Time" in *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter*), or for advanced users who want to bind a parameter to an EL expression. If you modify a property value in the Component Properties dialog, the new value overrides the value specified in the Content Presenter Configuration dialog, and that value becomes read-only in the Content Presenter Configuration dialog.

Table 18–13 describes the properties that are unique to the Content Presenter task flow.

Table 18–13 Content Presenter Task Flow Properties: Parameters Tab

Property	Type	Description	Default Value
`Data Source`	String	Optional. The data source of the content. The value depends on the value of `Data Source Type`: ■ When `Data Source Type` = `dsTypeSingleNode`: set `Data Source` to a single node identifier in the format: *connection_name*#dDocName:*content_id* For example: myconnection.us.oracle.com#dDocName:STANL18_IDC-007619 ■ When `Data Source Type` = `dsTypeFolderContents`: set `Data Source` to a single node identifier in the format: *connection_name*#dCollectionID:*collection_id* For example: myconnection.us.oracle.com#dCollectionID:45535 ■ When `Data Source Type` = `dsTypeQueryExpression`: set `Data Source` to a search expression. For example: `cm_isContent = true && dDocTitle like \'Big\'` See **Note** below. ■ When `Data Source Type` = `dsTypeMultiNode`: set `Data Source` to a set of comma-delimited node identifiers in the format: *connection_name*#dDocName:*content_id*, *connection_name*#dDocName:*content_id*, ... For example: myconn#dDocName:DOCUMENT_ID_12345,myconn#dDocName:DOCUMENT_ID_56789 where: *connection_name* = the name of the content repository connection. *content_id* = the `Content ID` for the content specified on the content information page for the item in Oracle Content Server. *collection_id* = the `dCollectionID` found in the URL for the folder information page in Oracle Content Server. **Note**: One way to determine the properties for the existing content types defined in Oracle Content Server is to use the Content Presenter Configuration dialog, as described in Section 18.4.2, "Displaying Content Using the Content Presenter Task Flow." When the **Content Source** is **Results of a Query**, click the **Add** icon in the dialog to list all the properties that are defined for the selected content type.	None
`Data Source Type`	String	Optional. The data source type of the content. Corresponds to the **Content Source** value in the Content Presenter Configuration dialog. Valid values are: ■ `dsTypeSingleNode`: A single content item. ■ `dsTypeFolderContents`: The contents of a folder. ■ `dsTypeQueryExpression`: The results of a query. ■ `dsTypeMultiNode`: An ordered list of content items.	None
`Maximum Results`	Long	Optional. The maximum number of results to display when `Data Source Type` is `dsTypeQueryExpression`. This value can be `null`.	`null`
`Task Flow Instance ID`	String	The unique identifier of the selected task flow, used internally to maintain the association of the task flow instance with its customization and personalization settings. Do not edit this value.	None

Table 18–13 (Cont.) Content Presenter Task Flow Properties: Parameters Tab

Property	Type	Description	Default Value
`Template Category ID`	Long	Optional. The display template category ID to use in rendering results for multiple content items. Enter the category ID of a template that is configured in the `<content-list-templates>` section of `templates-registry.xml`. See "Creating Custom Templates for Displaying Content Using Content Presenter" in *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter*.	None
`Template View ID`	Long	Optional. The display template view ID to use in rendering results for single content items. Enter the view ID of a template that is configured in the `<content-templates>` section of `templates-registry.xml`. See "Creating Custom Templates for Displaying Content Using Content Presenter" in *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter*.	None

18.6.2 Setting Document Manager Task Flow Properties

Table 18–14 describes the properties that are unique to the Document Manager task flow.

Table 18–14 Document Manager Task Flow Properties: Parameters Tab

Property	Type	Description	Default Value
`Connection Name`	String	Optional. The name of the content repository connection. If no value is entered, the default connection specified by the administrator is used. For information about configuring content repository connections, see "Registering Content Repositories" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter*. When you want to change the `Connection Name` property for a Documents service task flow, the value must be the name of one of the content repository nodes under All Documents. Example: `${'MyContent'}`	The connection selected as default in the Create Content Repository Connection dialog box by the application developer.

Table 18–14 (Cont.) Document Manager Task Flow Properties: Parameters Tab

Property	Type	Description	Default Value
`Start Folder Path`	String	Optional. The name of the folder to use as the root folder in the current task flow instance. This property is a content-scoping parameter that assists with determining the source and range of content to display in the task flow instance. To obtain a folder path, go to the Document Manager task flow, right-click the folder icon of the folder you want to use as the start folder, and select **Properties**. The full path is the first piece of information at the top of Folder Properties. Example: `/Manuals`	The root folder of the content repository configured with the specified connection

18.6.3 Setting Document List Viewer Task Flow Properties

Table 18–15 describes the properties that are unique to the Document List Viewer task flow.

Table 18–15 Document List Viewer Task Flow Properties: Parameters Tab

Property	Type	Description	Default Value
`Connection Name`	String	Optional. The name of the content repository connection. If no value is entered, the default connection specified by the administrator is used. For information about configuring content repository connections, see "Registering Content Repositories" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter*. When you want to change the `Connection Name` property for a Documents service task flow, the value must be the name of one of the content repository nodes under All Documents. Example: `${'MyContent'}`	The connection selected as default in the Create Content Repository Connection dialog box by the application developer.

Table 18–15 (Cont.) Document List Viewer Task Flow Properties: Parameters Tab

Property	Type	Description	Default Value

`Created After`	String	Optional. Limit the display of task flow content to files and folders created after a specified date and time. If no value is entered, then no "after" filtering using the creation date is applied.
		
		The value requires the following format:
		
		`yyyy-mm-ddThh:mm:ss.sssTZ`
		
		For example:
		
		`2009-11-17T18:24:36.000+01:00`
		
		This property is available for contextual wiring. For more information, see Chapter 11, "Wiring Pages, Task Flows, Portlets, and UI Components".
			None

`Created Before`	String	Optional. Limit the display of task flow content to files and folders created before a specified date and time. If no value is supplied, then no "before" filtering using the creation date is applied.
		
		The value requires the following format:
		
		`yyyy-mm-ddThh:mm:ss.sssTZ`
		
		For example:
		
		`2009-11-17T18:24:36.000+01:00`
		
		This property is available for contextual wiring. For more information, see Chapter 11, "Wiring Pages, Task Flows, Portlets, and UI Components".
			None

`Creator`	String	Optional. Limit the display of task flow content to files and folders created by a particular user. Enter the user name as specified by the user's login credentials (for example, `monty`). If no value is entered, then documents created by any user are shown. This property is available for contextual wiring. For more information, see Chapter 11, "Wiring Pages, Task Flows, Portlets, and UI Components". For example: `${'monty'}`	None

Table 18–15 (Cont.) Document List Viewer Task Flow Properties: Parameters Tab

Property	Type	Description	Default Value

`Last Modified After`	String	Optional. Limit the display of task flow content to files and folders last modified after a specified date and time.
		
		The value requires the following format:
		
		`yyyy-mm-ddThh:mm:ss.sssTZD`
		
		For example:
		
		`2009-11-17T18:24:36.000+01.00`
		
		This property is available for contextual wiring. For more information, see Chapter 11, "Wiring Pages, Task Flows, Portlets, and UI Components".
			None

`Last Modified Before`	String	Optional. Limit the display of task flow content to files and folders modified before the specified date and time. If no value is entered, then no "before" filtering using the last modification date is applied.
		
		The value requires the following format:
		
		`yyyy-mm-ddThh:mm:ss.sssTZD`
		
		For example:
		
		`2009-11-17T18:24:36.000+01:00`
		
		This property is available for contextual wiring. For more information, see Chapter 11, "Wiring Pages, Task Flows, Portlets, and UI Components".
			None

`Last Modifier`	String	Optional. Limit the display of task flow content to files and folders last modified by the specified user(s). Enter the user name(s) as specified by the user login credentials, separated by a space. If no value is entered, then all modified documents are shown. For example: `monty monica` This property is available for contextual wiring. For more information, see Chapter 11, "Wiring Pages, Task Flows, Portlets, and UI Components".	None

Table 18–15 (Cont.) Document List Viewer Task Flow Properties: Parameters Tab

Property	Type	Description	Default Value
`Root Folder Path`	String	Optional. The name of the folder to use as the root folder in the current task flow instance. This property is a content-scoping parameter that assists with determining the source and range of content to display in the task flow instance. There is no need to set this value for task flows that display the content of the current space's default root folder. But it is useful, for example, when you want the start folder to be other than a group space's default root folder and when you want to display content from another group space. For example ▪ `/PersonalSpaces/monty/Public` ▪ `/WebCenterB5/Proj_X/Specs`	The root folder of the content repository configured with the specified connection.
`Show Folders`	Boolean	Specifies whether to display documents and folders, or documents only: ▪ `true`: folders are shown along with files ▪ `false` (default): folders are hidden and only files appear in the task flow	`false`
`Task Flow Instance ID`	String	The unique identifier of the selected task flow, used internally to maintain the association of the task flow instance with its customization and personalization settings. Do not edit this value.	None

18.6.4 Setting Recent Documents Task Flow Properties

Table 18–16 describes the properties that are unique to the Recent Documents task flow.

Table 18–16 Recent Documents Task Flow Properties: Parameters Tab

Property	Type	Description	Default Value
`Connection Name`	String	Optional. The name of the content repository connection. If no value is entered, the default connection specified by the administrator is used. For information about configuring content repository connections, see "Registering Content Repositories" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter*. When you want to change the `Connection Name` property for a Documents service task flow, the value must be the name of one of the content repository nodes under All Documents. Example: `${'MyContent'}`	The connection selected as default in the Create Content Repository Connection dialog box by the application developer.
`Group Space`	String	(used in WebCenter Spaces only) Optional. The name of a group space for which to display the documents recently modified or created.	None

`Last Modified After`	String	Optional. Limit the display of task flow content to files and folders last modified after a specified date and time. If no value is entered, then files and folders modified in the last three months are shown.
		
		The value requires the following format:
		
		`yyyy-mm-ddThh:mm:ss.sssTZ`
		
		For example:
		
		`2009-11-17T18:24:36.000+01.00`
		
		This property is available for contextual wiring. For more information, see Chapter 11, "Wiring Pages, Task Flows, Portlets, and UI Components".
			3 months prior to the current date

Table 18–16 (Cont.) Recent Documents Task Flow Properties: Parameters Tab

Property	Type	Description	Default Value

`Last Modified Before`	String	Optional. Limit the display of task flow content to files and folders modified before the specified date and time. If no value is entered, then no "before" filtering using the last modification date is applied.
		
		The value requires the following format:
		
		`yyyy-mm-ddThh:mm:ss.sssTZ`
		
		For example:
		
		`2009-11-17T18:24:36.000+01:00`
		
		This property is available for contextual wiring. For more information, see Chapter 11, "Wiring Pages, Task Flows, Portlets, and UI Components".
			None

`Last Modifier`	String	Optional. Limit the display of task flow content to files and folders last modified by any of the specified users. Enter the user name(s) as specified by the user login credentials, separated by a space. If no value is entered, then all modified documents are shown. For example: `monty monica` This property is available for contextual wiring. For more information, see Chapter 11, "Wiring Pages, Task Flows, Portlets, and UI Components".	None
`Maximum Documents`	Long	Optional. Limit the number of files displayed to the specified maximum. If no value is entered, then all matching files are shown. For example: `10`	`null`
`Most Recent First`	Boolean	Optional. The default sort order of files in the task flow: ■ `true` (default): the most recent documents are listed first. ■ `false`: the oldest documents are listed first.	`true`

18.6.5 Setting Documents Service Properties on the Display Options Tab

The properties on the **Display Options** tabs control the selections offered on the task flow chrome, and the display elements that surround task flow content and are common to all task flows. For more information, see Section 10.4.4, "Working with Component Display Options."

18.6.5.1 Setting Individual Document Properties

When you add a single document to a page, such as an image or an HTML file, the properties on the **Display Options** tab are unique to the item added to the page, as described in the following tables:

- Table 18–17, " Image Item Properties: Display Options"
- Table 18–18, " Link Item Properties: Display Options"
- Table 18–19, " Inline Frame (IFRAME) Item Properties: Display Options"

Table 18–17 Image Item Properties: Display Options

Property	Description
`Image Map Type`	Values for indicating the map type when the selected file is an image map. Choose from: ■ `none` ■ `server`
`Long Desc URL`	URL to a file containing a description of image. For example: `http://www.abc.com/image_desc.htm`
`Short Desc`	See Table 10–1.
`Source`	Path to the file relative to the application root. For example: `/resources/images/cologo.gif`
`Show Component`	See Table 10–1.

Table 18–18 Link Item Properties: Display Options

Property	Description
`Title`	Display name of the selected file. Default: file name.
`Destination`	Path to the file relative to the application root. For example: `/resources/images/cologo.gif`
`Open in a new window`	Select where the file opens: ■ Checked: open file in new browser tab or window. ■ Cleared: open file in current browser window. This option is relevant only to files that open in your browser. Some files, such as Microsoft Word files, open in their native applications.
`Show Component`	See Table 10–1.

Table 18–19 Inline Frame (IFRAME) Item Properties: Display Options

Property	Description
`Short Desc`	See Table 10–1.
`Source`	Path to the file relative to the application root. For example: `/resources/images/cologo.gif`
`Show Component`	See Table 10–1.

19

Working with the Events Service

The Events service provides group calendars that you can use to schedule meetings, appointments, and any other type of team occasion. Additionally, a dedicated **Events** page is available to every group space where the space's moderator has enabled the Events service.

The Events service also enables you to view your own personal Microsoft Exchange calendar within your personal space. In addition, you can overlay group space calendars on top of that calendar, so that you can view all your important meetings in a single calendar.

> **Note:** The Events service is available only in the WebCenter Spaces application, not in custom WebCenter applications. Consequently, when we discuss it in this chapter, we do so only within the context of WebCenter Spaces.

This chapter explores the features offered through the Events service. It contains the following sections:

- Section 19.1, "What You Should Know About the Events Service"
- Section 19.2, "Working with Events Service Features"
- Section 19.3, "Setting Events Service Task Flow Properties"

Audience

This chapter is intended for users who want to use Events service task flows to schedule and track events.

The WebCenter Spaces application administrator has the authority to expose or hide a particular service's task flows. Tasks discussed in this chapter are not available to you if the relevant service is hidden. For information about WebCenter Spaces seeded user roles, see the *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter*.

19.1 What You Should Know About the Events Service

Events include appointments, meetings, presentations, and so on. Within WebCenter Spaces, there are two kinds of events:

- Personal events are those that concern only you. They could include things like dentist appointments or a meal with a friend.

Personal events come from your Microsoft Exchange calendar and display only to you and only in Events task flows that are located on pages in your personal space.

- Group space events are those that involve all members of a specific group space. They could include weekly meetings or presentations.

  Group space events display to all members of the group space on the group space's dedicated **Events** page or in any Events task flow that is located on a page in the group space. Members with the required level of permission can schedule or update events.

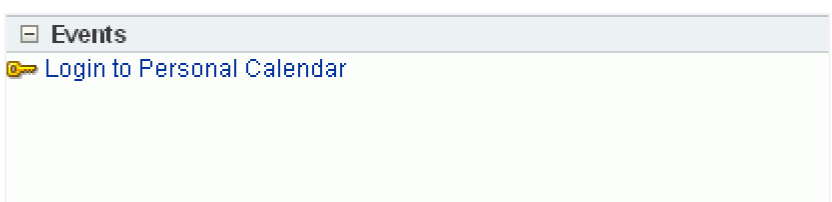
> **Note:** If your application uses WebCenter's default user roles, then the required permissions to create an event are included in both the *participant* and *moderator* roles. *Participants* and *Moderators* can manage all events.

In addition to displaying your personal Microsoft Exchange calendar, in the Events task flow in your personal space you can overlay your personal calendar with events from significant group spaces. In this way, you can have all your important events available in one location, rather than having to go to multiple group spaces to manage your daily schedule. In a group space, if you can create a page and add an Events task flow to it, you can also extend that task flow to display events from other group spaces. This is useful if some group spaces are very closely connected with similar membership lists.

> **Note:** The Events page only displays events from the current group space.

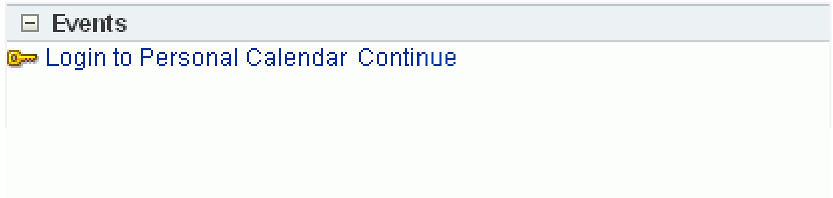
When you first add an Events task flow to a page in your personal space, the task flow does not initially display the calendar of events. Instead the task flow displays a link prompting you to log in (Figure 19–1). For information about logging in to your personal calendar, see Section 19.2.2, "Accessing Your Personal Microsoft Exchange Calendar."

Figure 19–1 Events Task Flow in Personal Space Before Logging In



If you do not have a Microsoft Exchange calendar, or do not want to display personal events, but still want to view group space events in your personal space, enable calendar overlaying and then click **Continue** (Figure 19–2) For information about calendar overlaying, see Section 19.2.8, "Displaying Multiple Calendars in a Single Task Flow."

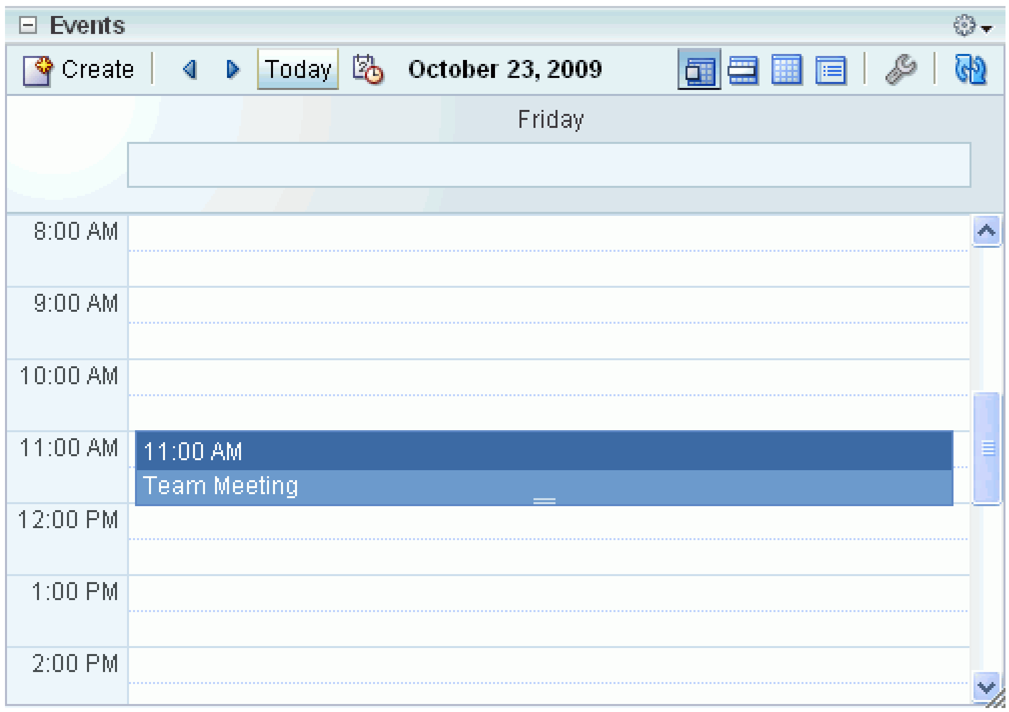
Figure 19–2 Events Task Flow in Personal Space with Calendar Overlay Enabled



Your application may provide a variety of locations from which to view events.

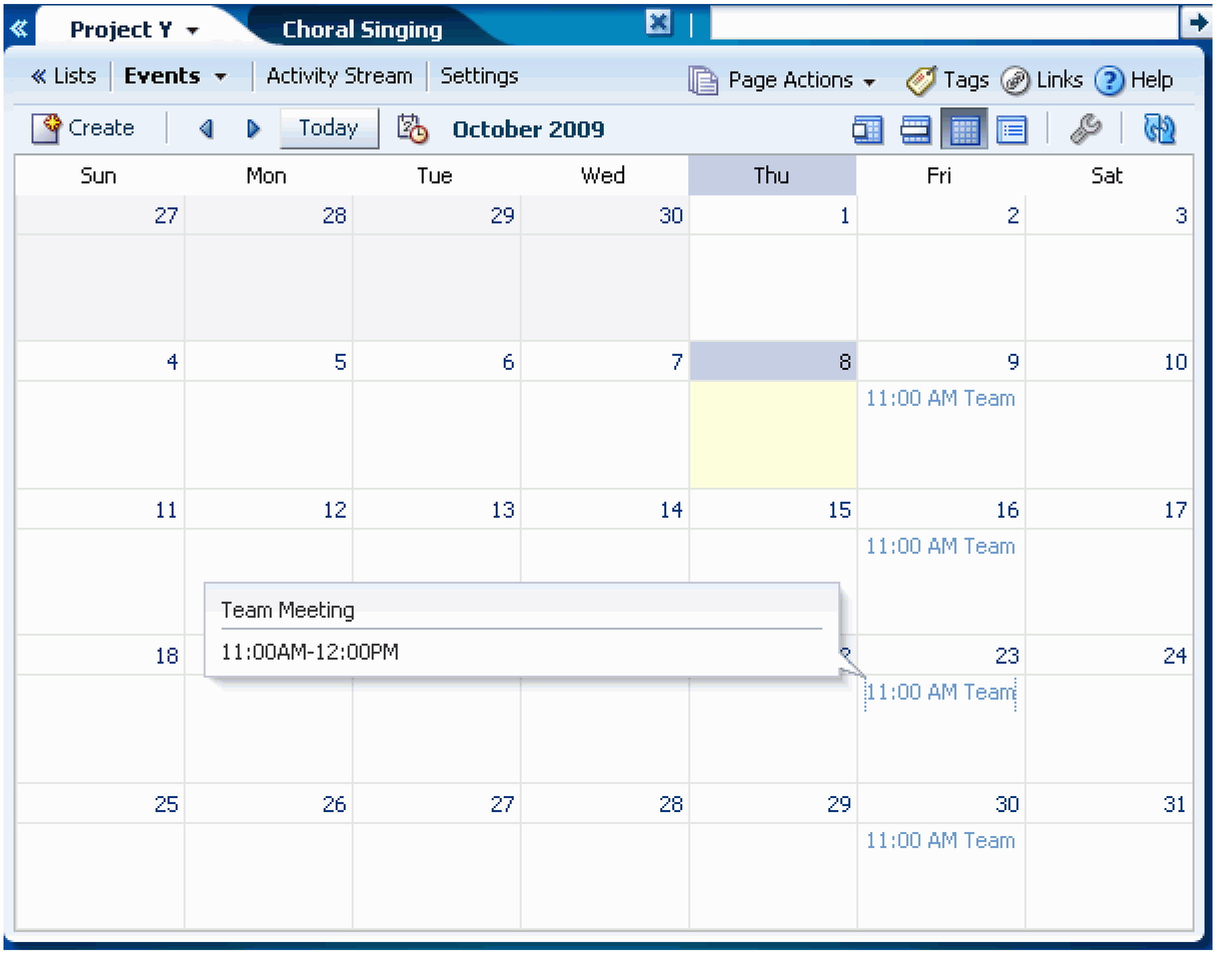
- Figure 19–3 shows events in an Events task flow on a group space page. The Events task flow can also be included on a personal space page.

Figure 19–3 An Events Task Flow on a Group Space Page



- Figure 19–4 shows events on the **Events** page.

Figure 19–4 The Events Page



Through its tight integration with the Links service, the Events service provides the opportunity to associate events with other WebCenter Spaces items. 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 Chapter 21, "Working with the Links Service."

19.2 Working with Events Service Features

Meetings are a fact of life. The art is in keeping on top of all those meetings, making sure you can attend all those that matter and keep abreast of what is going on.

Note: The steps in the following sections apply to personal events and group space events. Where there are any differences, these are noted.

This section includes the following subsections:

- Section 19.2.1, "Adding an Events Service Task Flow to a Page"
- Section 19.2.2, "Accessing Your Personal Microsoft Exchange Calendar"
- Section 19.2.3, "Viewing Events"

- Section 19.2.4, "Scheduling Events"
- Section 19.2.5, "Viewing Event Details"
- Section 19.2.6, "Revising Scheduled Events"
- Section 19.2.7, "Cancelling Scheduled Events"
- Section 19.2.8, "Displaying Multiple Calendars in a Single Task Flow"

19.2.1 Adding an Events Service Task Flow to a Page

For the steps to add an Events service task flow to a page, see Section 10.1.4, "Adding Task Flows to a Page."

19.2.2 Accessing Your Personal Microsoft Exchange Calendar

You may maintain a calendar of events outside of WebCenter Spaces that does not relate to specific group spaces. If you use Microsoft Exchange 2003 or 2007 for this calendar, you can include the information in your WebCenter Spaces personal space. This keeps all your calendar information in a single place, making it much easier for you to organize your day.

Before You Begin

Before you can access your Microsoft Exchange calendar in WebCenter Spaces, your administrator must have created a connection to the Microsoft Exchange Server. For more information, see the chapter "Managing the Events Service" in the *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter*.

To access your Microsoft Exchange calendar:

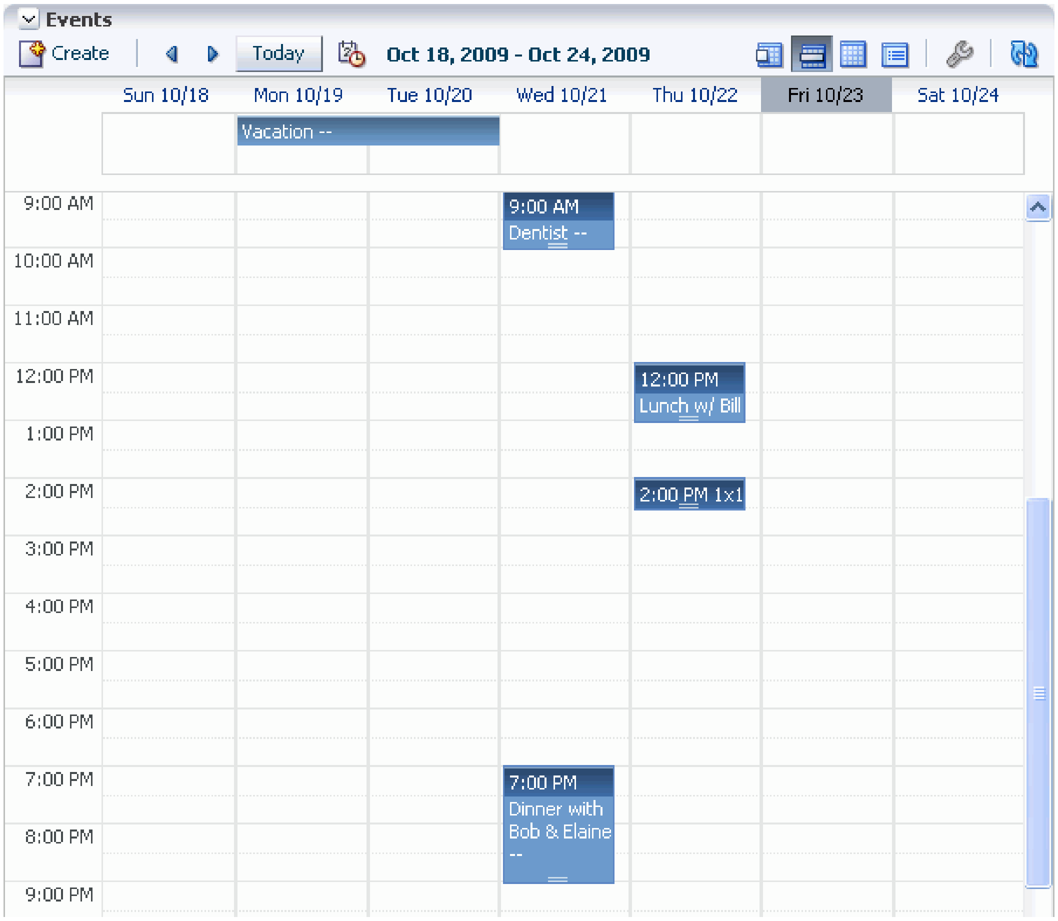
1. Log in to WebCenter Spaces and go to your personal space.
2. Locate the page where you want to add your Microsoft Exchange calendar.
3. Edit the page and add the Events task flow to the appropriate region on the page.

   For more detailed information, see Section 10.1.4, "Adding Task Flows to a Page."
4. Click **Save** and then **Close.**
5. In the Events task flow, click **Login to Personal Calendar.**

   Note: If you see the link **Try Again** instead of **Login to Personal Calendar**, there is a problem with the connection to the Microsoft Exchange Server. Contact your administrator.

   ---
6. Enter your Microsoft Exchange login credentials and click **OK.**

Figure 19–5 Personal Calendar



19.2.3 Viewing Events

You can view events as a grid or a list; choose to display events a day, a week, or a month at a time; select the range of hours displayed per day; and include a second time zone in the display.

This section includes the following subsections:

- Section 19.2.3.1, "Displaying the Events Page for a Group Space"
- Section 19.2.3.2, "Displaying Events by Day, Week, or Month or as a List"
- Section 19.2.3.3, "Viewing Events for a Different Date"
- Section 19.2.3.4, "Refreshing Your View of Events"
- Section 19.2.3.5, "Setting Time Display Preferences"

19.2.3.1 Displaying the Events Page for a Group Space

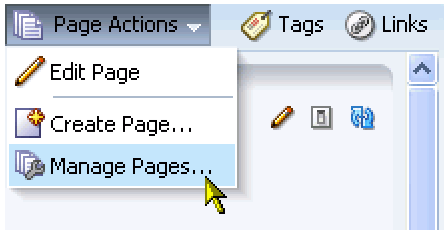
In every group space, group space events display on the **Events** page. However, the **Events** page may not display by default. If so, it's easy to display the **Events** page using the Manage Pages dialog.

To display the **Events** page:

1. Log in to WebCenter Spaces and go to the group space where you want to display the **Events** page.

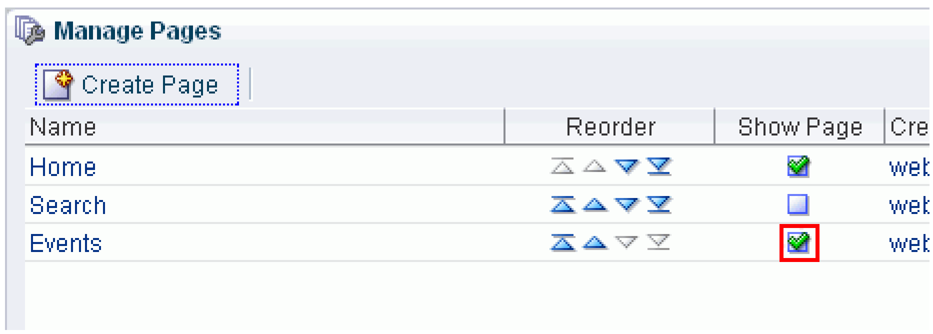
2. Select the **Manage Pages** command from the **Page Actions** menu (Figure 19–6).

Figure 19–6 The Manage Pages Command



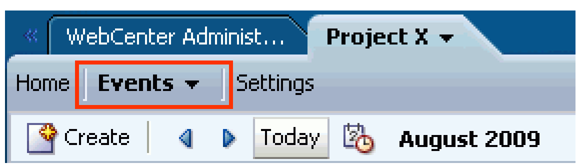
3. In the Manage Pages dialog, select the **Show Page** checkbox for the **Events** page. (Figure 19–7).

Figure 19–7 Showing the Events Page through the Manage Pages Dialog



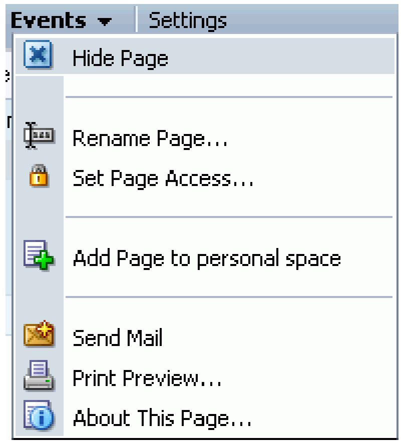
4. In the group space, there is now a tab for the **Events** page (Figure 19–8).

Figure 19–8 The Events Tab for a Group Space



5. If you later decide that you no longer want to display the **Events** page, click the tab and choose **Hide Page** from the menu (Figure 19–9).

Figure 19–9 Hiding the Events Page



19.2.3.2 Displaying Events by Day, Week, or Month or as a List

You can display personal and group space events in grid form or in list form. When you display events as a list, all upcoming events for the next year are listed. When you display events as a grid, you can display events by day, week, or month.

To display events by day, week, or month or as a list:

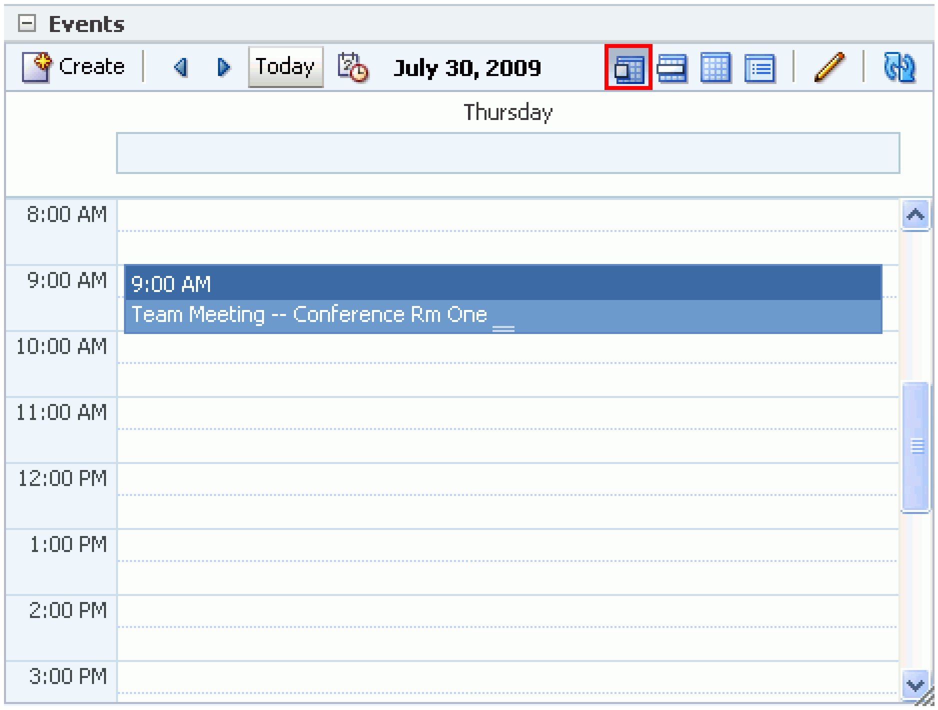
1. Log in to WebCenter Spaces and go to the Events task flow (or **Events** page) where you want to set event display options.

   If the **Events** page is not available, see Section 19.2.3.1, "Displaying the Events Page for a Group Space."

2. On the toolbar:

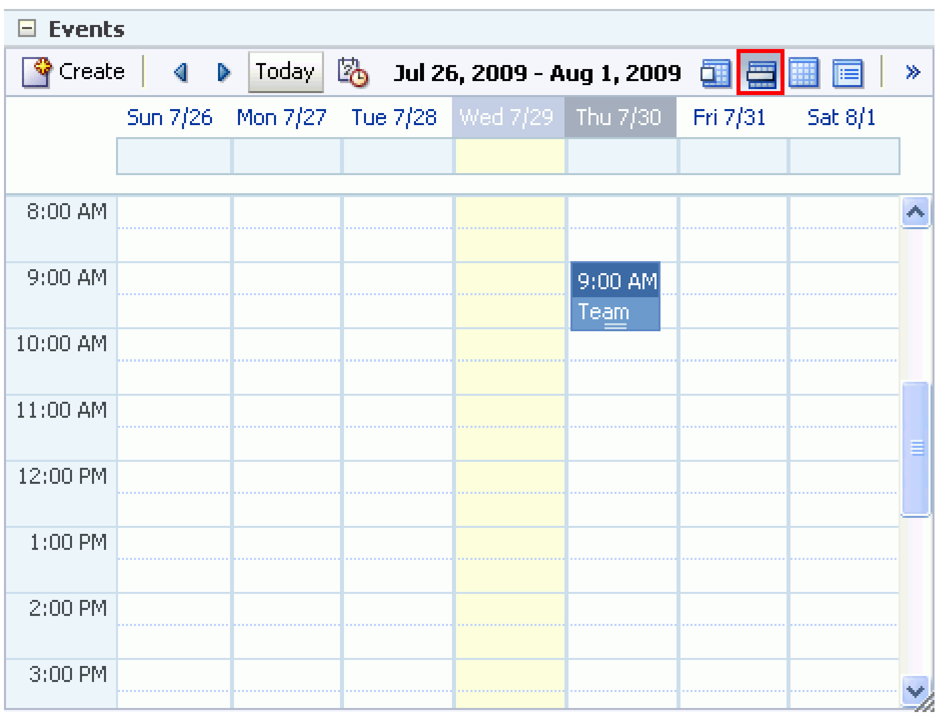
   - Click the **Day** icon to display the calendar one day at a time (Figure 19–10).

Figure 19–10 Events Displayed by Day



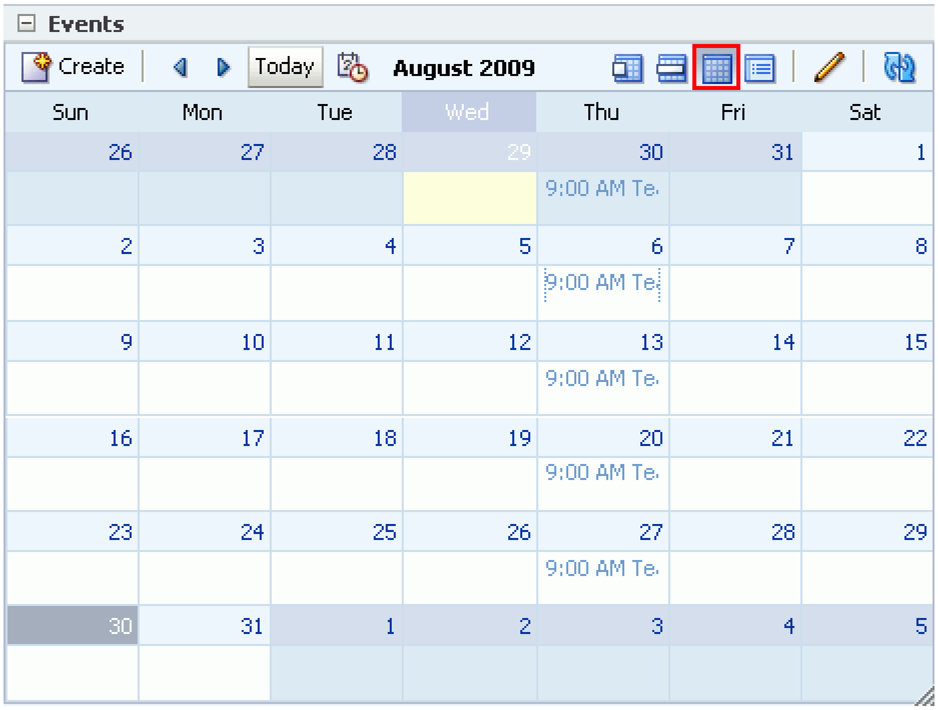
- Click the **Week** icon to display the calendar for the whole week (Figure 19–11).

Figure 19–11 Events Displayed by Week



- Click the **Month** icon to display the calendar for the whole month (Figure 19–12).

Figure 19–12 Events Displayed by Month



- Click the **List** icon to display a list of upcoming events (Figure 19–13).

Figure 19–13 Events Displayed as a List

The calendar refreshes and appears in the selected mode.

19.2.3.3 Viewing Events for a Different Date

Usually, in grid mode, the **Events** page or Events task flow displays events for the current day, week, or month. To view events for a specific point in time, you can use the previous or next buttons or select a date so that the calendar displays events for a different date.

To select a date:

1. Log in to WebCenter Spaces and go to the Events task flow (or **Events** page) where you want to select a date for an event.

   If the **Events** page is not available, see Section 19.2.3.1, "Displaying the Events Page for a Group Space."

2. On the toolbar, click the **Previous** or **Next** icon until the appropriate date is displayed.

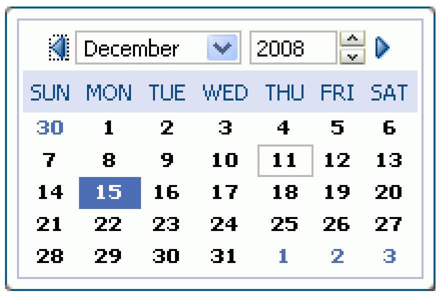
   In Day view, this displays the previous or next day. In Week and List view, this displays the previous or next week. In Month view, this displays the previous or next month.

3. If you know the specific date, on the toolbar, click the **Select Date** icon (Figure 19–14).

Figure 19–14 The Select Date Icon

The date picker opens (Figure 19–15). Today's date is boxed, and the currently selected date (which may also be today's date) is highlighted. For example, in Figure 19–15, today's date is the 11th and the selected date is the 15th.

Figure 19–15 The Date Picker



Note: If the calendar overlay feature is enabled in Full mode for the task flow, the Date Picker is always visible to the left of the calendar.

---

4. Use the date picker to select the month, year, and day.

   For example, select a month from the dropdown list; select a year using the controls to the right of the current year, or enter the value yourself; click a date to select a day. Once you select a day, the date picker closes and the calendar shows events for that date.

5. To quickly return to today's date, click the **Today** link.

19.2.3.4 Refreshing Your View of Events

The Events task flow and **Events** page include a **Refresh** icon that you can use to refresh your calendar (Figure 19–16).

Figure 19–16 The Refresh Icon

This is useful for updating your view of the calendar with any recent changes made by other users. Click the **Refresh** icon and the calendar redraws, reflecting recent changes.

19.2.3.5 Setting Time Display Preferences

Time display preferences determine the earliest time displayed on the calendar when events are viewed by day or week.

You can also use time display preferences to identify a secondary time zone. This feature is particularly useful with international workforces. When selecting an hour to hold a meeting, it's useful to know the hours most optimal for meeting in both time zones.

To set up time display preferences:

1. Log in to WebCenter Spaces and go to the Events task flow (or **Events** page) where you want to set time display preferences.

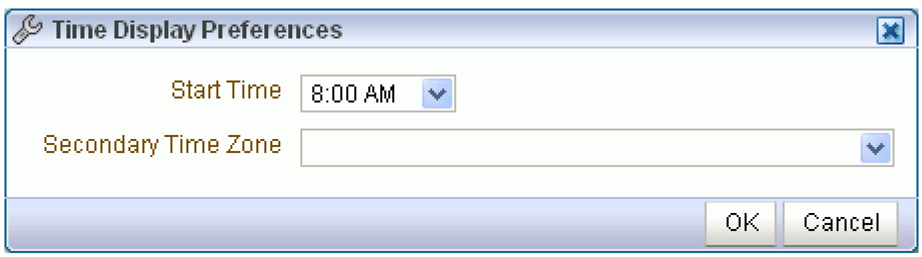
   If the **Events** tab is not available, see Section 19.2.3.1, "Displaying the Events Page for a Group Space."

2. Click the **Set time display preferences** icon on the toolbar (Figure 19–17).

Figure 19–17 The Set Time Display Preferences Icon

   The Time Display Preferences dialog opens (Figure 19–18).

Figure 19–18 The Time Display Preferences Dialog



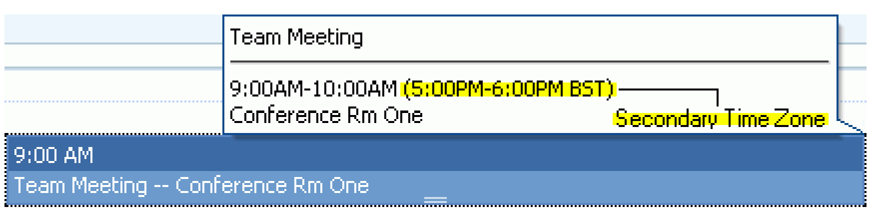
3. From the **Start Time** dropdown list, select the first hour to display on the grid when there is limited display space. If the grid is big enough to display hours from before the start time up until 11PM, it does so.

   Choose from 12AM to 11PM.

4. Optionally, from the **Secondary Time Zone** dropdown list select a secondary time zone to display along with the primary time zone.

   When a user rolls a mouse pointer over the event in the calendar, event details pop up. The secondary time zone appears in the popup (Figure 19–19).

Figure 19–19 An Event Details Popup Displaying Primary and Secondary Time Zones



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

19.2.4 Scheduling Events

The following section shows you how to schedule an event.

To schedule an event:

1. Log in to WebCenter Spaces and go to the Events task flow (or **Events** page) where you want to schedule an event.

   If the **Events** tab is not available, see Section 19.2.3.1, "Displaying the Events Page for a Group Space."

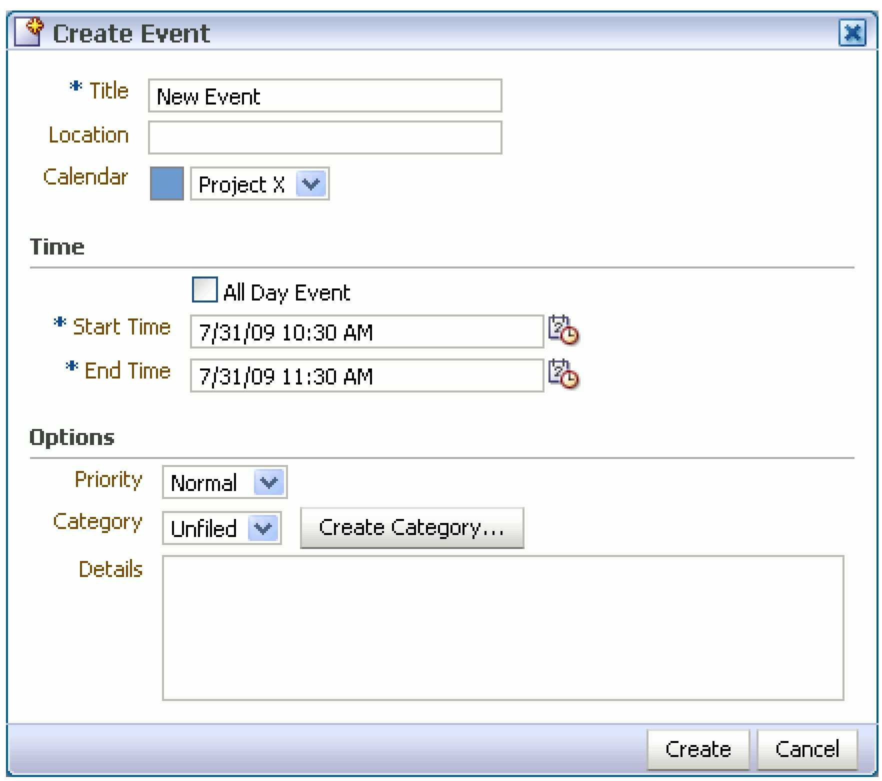
2. Click the **Create a new event** icon on the toolbar (Figure 19–20).

Figure 19–20 The Create a New Event Icon

The Create Event dialog opens (Figure 19–21). The fields in the Create Event dialog are slightly different depending on whether you are creating a personal event or a group space event. For group space events, the dialog includes a **Category** dropdown list; for personal events, the dialog includes a **Private** checkbox. These options are described in further detail 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 choosing **Create**. The advantage of this is that date and time of the event are automatically specified in the dialog.

Figure 19–21 The Create Event Dialog Invoked from a Group Space



3. In the **Title** field, enter a brief descriptive title for the event.

   For example, `Project Reality Check`.

4. In the **Location** field, enter the location of the event.

For example, `Bldg. 5, room 786`.

5. From the **Calendar** dropdown list, select the calendar against which you want to create the event.

   If you do not have the calendar overlay feature enabled, there is only one option in this list: the current calendar. For more information about calendar overlays, see Section 19.2.8, "Displaying Multiple Calendars in a Single Task Flow."

6. In the **Time** section, select **All Day Event** to block out the entire day for the event.

   All-day events can span multiple days.

7. In the **Start Time** field enter or select a date and time to start the event. You can click the **Select Date and Time** icon and select a start time from the Date Picker, if you prefer.

8. In the **End Time** field enter or select a date and time to finish the event. You can click the **Select Date and Time** icon and select an end time from the Date Picker, if you prefer.

   > **Note:** All selections under the Options section are optional.

9. In the **Options** section, assign a priority for the event.

   Choose from **Highest**, **High**, **Normal**, **Low**, or **Lowest**.

10. Select a category to classify this event from the **Category** dropdown list.

    Optionally, click the **Create Category** button to create a category and automatically select it for this event.

    Categories are useful for creating distinct groups of events, organized according to their general purpose.

    > **Note:** The Category dropdown list is not available for personal events.

11. In the **Details** text box, enter any additional details you want to include, up to a maximum of 4000 characters.

12. Select the **Private** checkbox if you do not want other users to be able to view this event.

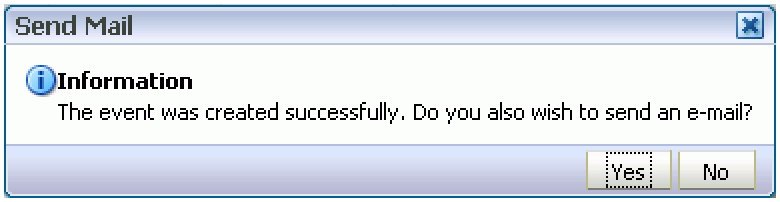
13. Click the **Create** button.

14. In the Send Mail message window, click **Yes** to send an email notification to all members of the group space distribution list informing them about the event (Figure 19–22).

    If you do not want to send a notification, click **No**.

    > **Note:** The Send Mail message window does not appear when creating personal events.

Figure 19–22 Send Mail Message Window

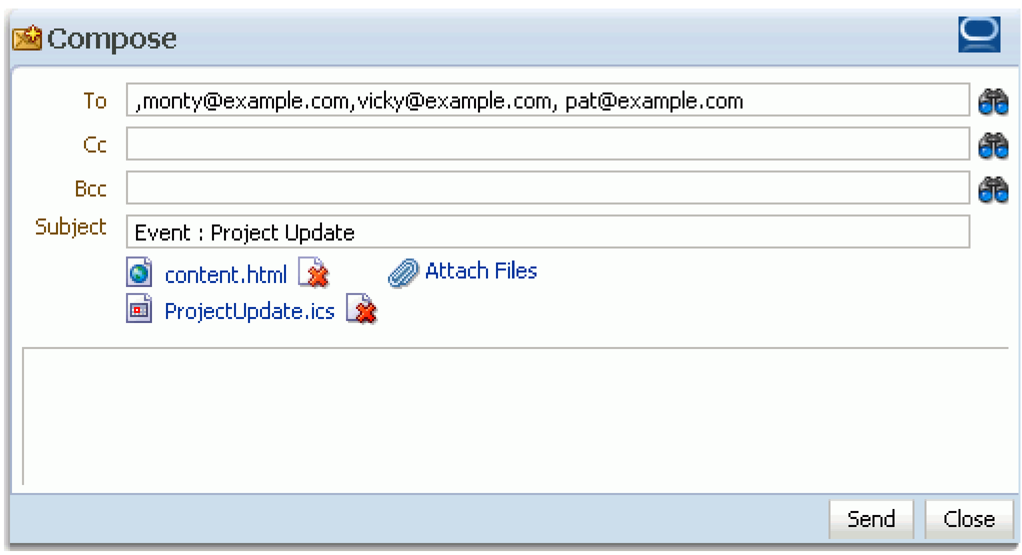


15. Provide your mail login credentials, if necessary.

    The Compose window displays (Figure 19–23). The **To** field is automatically populated with the member email addresses, distribution list, or both for the group space. The Events service also provides a default subject, and attaches a text or HTML file containing the message body file and an icalendar file with details of the event.

    > **Note:** If the contents of the **To** field would be greater than 256 characters, the **To** field is left empty and a warning message is included in the message body file.

Figure 19–23 Compose Window for Event Notification



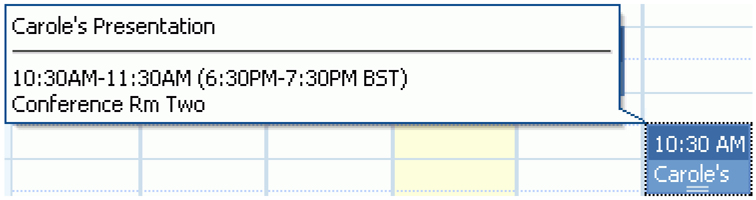
16. Compose the body of the message and click **Send**.

    A dialog opens with a message that asks whether you want to compose another message or close the Compose window.

17. Click **Yes** to open a new Compose window or **No** to exit.

    The event is added to the calendar (Figure 19–24)

Figure 19–24 An Event on the Events Page



19.2.5 Viewing Event Details

The **Events** page or Events task flow displays basic information about events. To view more information, such as the location or start and end times, simply hover your mouse over an event.

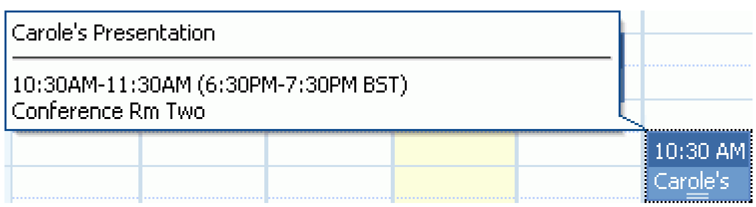
To view event details:

1. Log in to WebCenter Spaces and go to the Events task flow (or **Events** page) where you want to view event details.

   If the **Events** page is not available, see Section 19.2.3.1, "Displaying the Events Page for a Group Space."

2. Hover the mouse over a link to an event to display the event details (Figure 19–25).

Figure 19–25 An Event on the Events Page



   To view the priority or category of the event you must edit the event. For more information, see Section 19.2.6, "Revising Scheduled Events."

19.2.6 Revising Scheduled Events

You may want to change some aspect of an event; for example, you may want to change the time to accommodate a particular attendee, or the location might become unavailable.

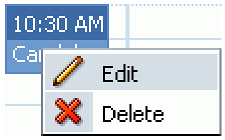
To revise a scheduled event:

1. Log in to WebCenter Spaces and go to the Events task flow (or **Events** page) where you want to revise a scheduled event.

   If the **Events** page is not available, see Section 19.2.3.1, "Displaying the Events Page for a Group Space."

2. Right-click the event and choose **Edit** (Figure 19–26).

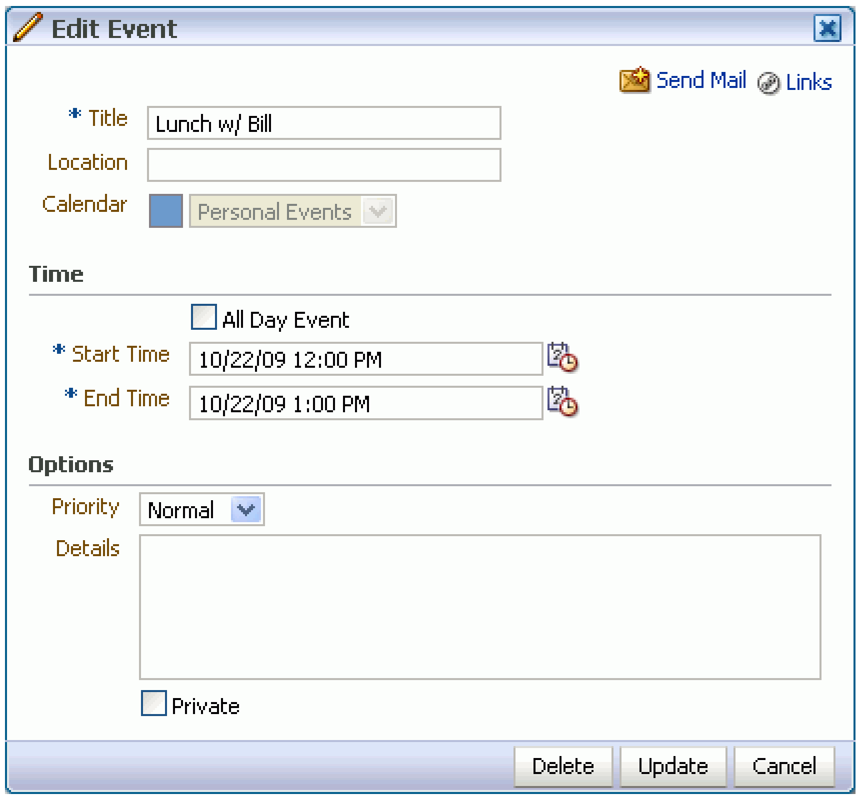
Figure 19–26 Editing an Event



The Edit Event dialog opens (Figure 19–27).

You can also get to the Edit Event dialog by clicking an event, or by moving the mouse pointer (or using the Tab key) to highlight an event and pressing Enter.

Figure 19–27 The Edit Event Dialog Invoked from a Personal Space



3. Revise the event details.
4. Click **Update** to save your changes.

19.2.7 Cancelling Scheduled Events

To cancel an event, you can delete it from the **Events** page or task flow.

To cancel a scheduled event:

1. Log in to WebCenter Spaces and go to the Events task flow (or **Events** page) where you want to cancel a scheduled event.

   If the **Events** tab is not available, see Section 19.2.3.1, "Displaying the Events Page for a Group Space."
2. Right-click the event and choose **Delete** (Figure 19–28).

Figure 19–28 Deleting an Event

You can also delete an event by hovering your mouse over the event and pressing the Delete key and from the Edit Event dialog.

3. Click **Delete** in the Delete Confirmation dialog.

   The event is removed from the calendar.

19.2.8 Displaying Multiple Calendars in a Single Task Flow

Within WebCenter Spaces, you may be a member of several group spaces. Each of these group spaces 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, the last thing you want to have to do is trawl through each of these calendars individually to determine your schedule for the day.

To solve this issue, the Events service enables you to view multiple calendars, or overlay calendars, in a single Events task flow. The best place to do this is in your personal space, so that you can also include your personal appointments. However, you can also overlay calendars in a group space Events task flow.

The events from each calendar are displayed in a different color to help identify the source of the event.

To overlay multiple calendars in a single task flow:

1. Log in to WebCenter Spaces and go to your personal space or the appropriate group space.
2. Locate the page that contains the Events task flow.

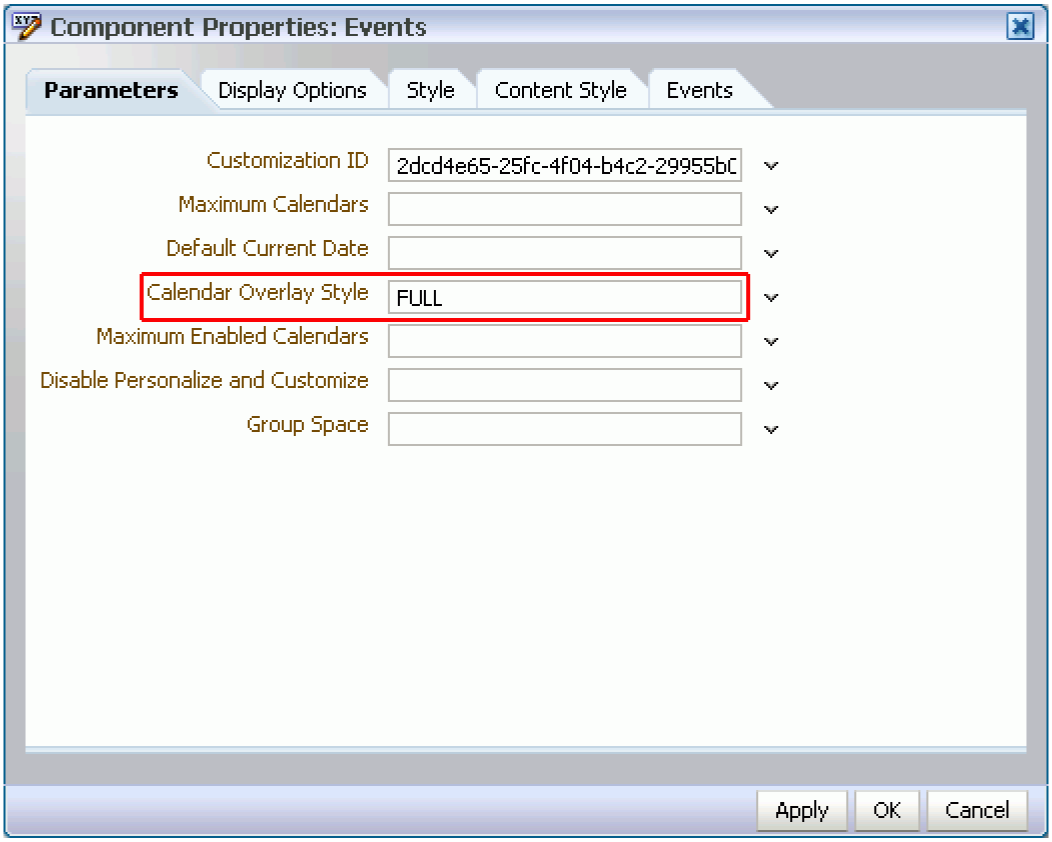
   If you have not yet added the Events task flow to a page, see Section 10.1.4, "Adding Task Flows to a Page."
3. From the **Page Actions** menu, choose **Edit Page.**
4. Click the **Edit** icon for the Events task flow.

   > **Note:** If you are working in a group space, you may not have the appropriate permissions to edit the task flow. To enable calendar overlay, contact the group space moderator.

5. In the **Parameters** tab of the Component Properties: Events dialog (Figure 19–29), enter `FULL` or `MINI` in the **Calendar Overlay Style** field.

   - `FULL` provides a more detailed view of the calendar overlay, but takes up more space on your screen. You may want to use the `FULL` option when you are first using calendar overlays.
   - `MINI` provides a view of the calendar overlay that takes up less space on your screen, but it might not be immediately obvious how to work with the overlays. You might want to use the `MINI` option when you have become more familiar with calendar overlays and how to use them.

Figure 19–29 The Calendar Overlay Style Events Service Property

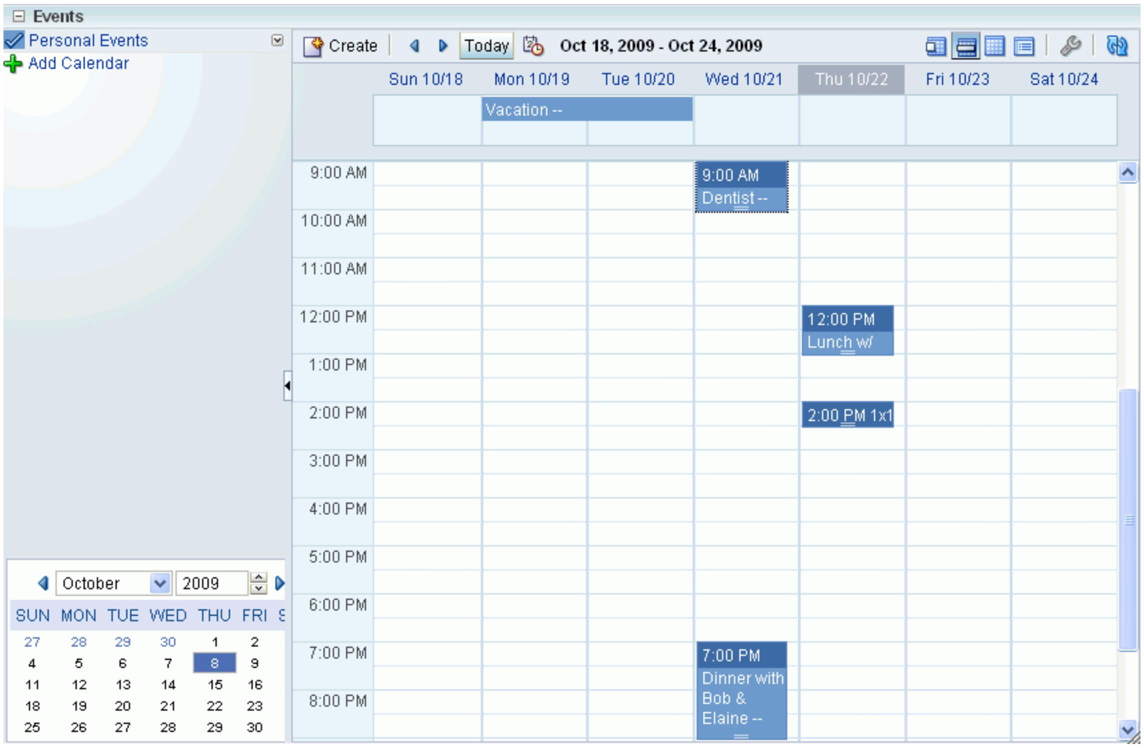


6. Click **OK.**
7. Click **Save** and then **Close.**

   The Events task flow now includes an area to the left of the calendar where you can choose other calendars to display in the task flow (Figure 19–30).

   If you select the `FULL` option for the **Calendar Overlay Style**, the task flow also now includes a date picker to help you easily move around your calendar.

Figure 19–30 The Events Task Flow Including the Calendar Overlay Area



8. To add another calendar to the task flow:

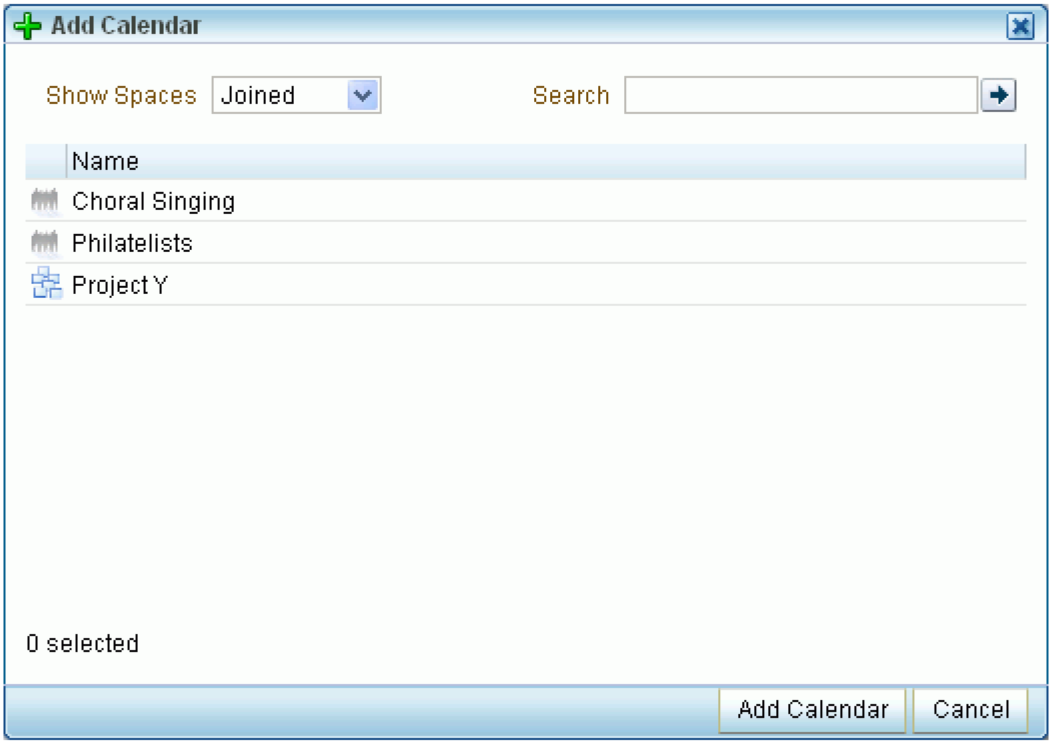
   a. In the calendar overlay area of the Events task flow, click the **Add Calendar** icon.

Figure 19–31 The Add Calendar Icon

   b. In the Add Calendar dialog (Figure 19–32), select the group space whose events you want to see in your calendar.

   You can select multiple group spaces in this dialog.

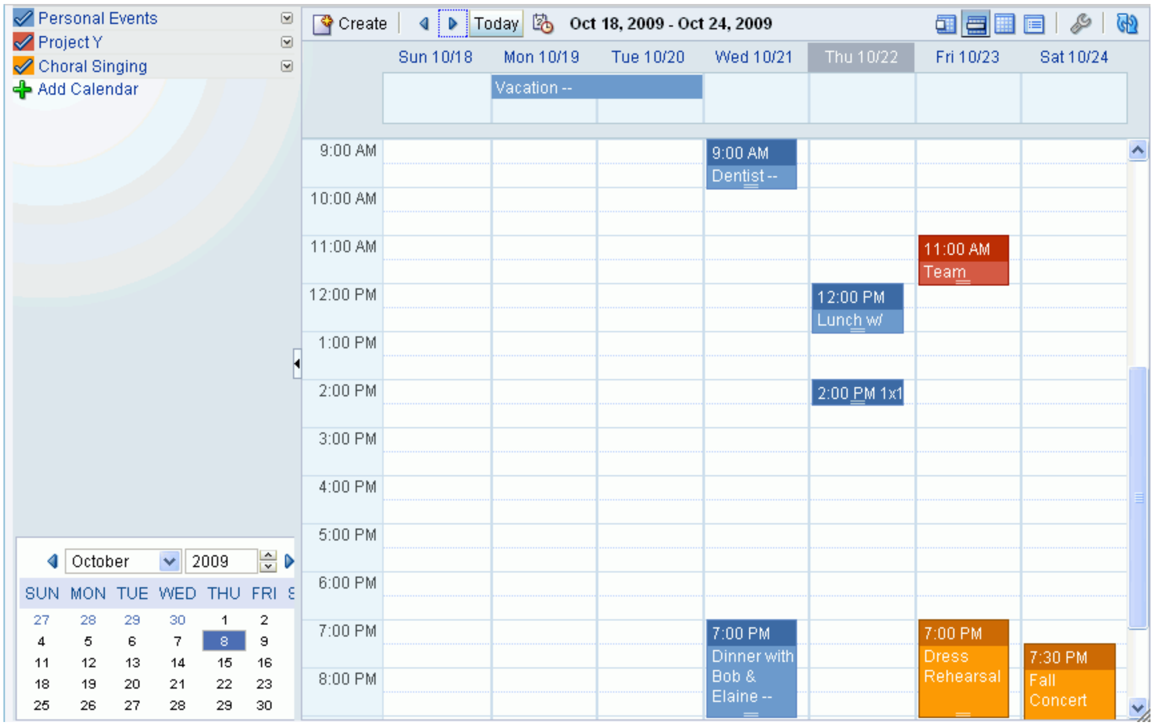
Figure 19–32 The Add Calendar Dialog



c. Click **Add Calendar.**

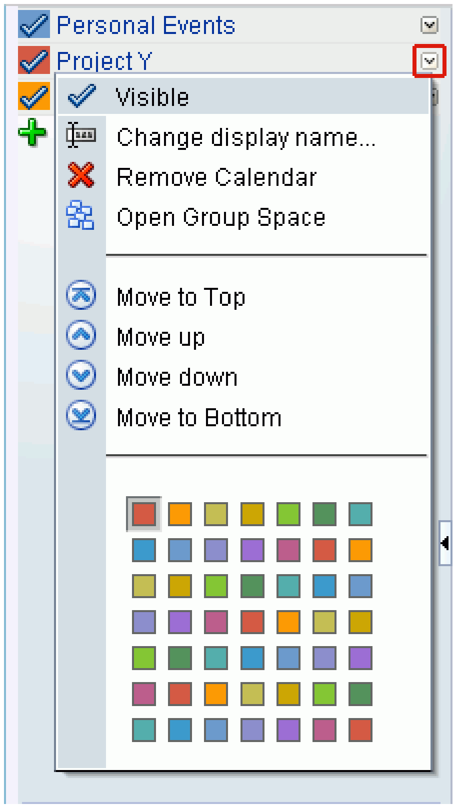
The calendar overlay area now includes your selected group space and the calendar on the right includes events from that group space. The events from the each group space are displayed in a different color.

Figure 19–33 The Events Task Flow Displaying Multiple Calendars



9. After adding a group space's events to your calendar you can change various display options by clicking the arrow icon to the right of the group space in the calendar overlay area.

Figure 19–34 The Calendar Overlay Menu



Choose

- **Visible** to toggle the display of this calendar's events in the calendar.

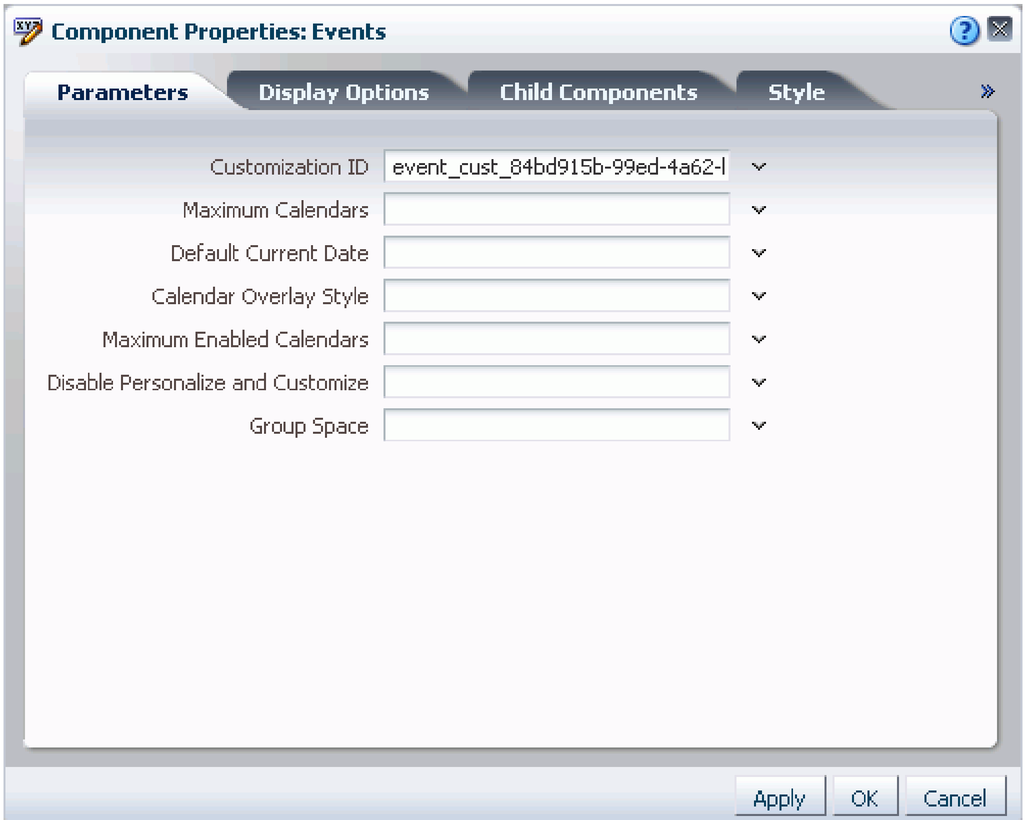
  You can also toggle the display of a calendar's events by clicking the calendar name or the colored square next to the calendar name.
- **Change display name** to make the name in the list of calendars more meaningful to you than just the group space name.
- **Remove Calendar** to remove this calendar's events permanently.
- **Open Group Space** to open the group space associated with this calendar.
- **Move to Top**/**Move up**/**Move down**/**Move to Bottom** to rearrange this calendar in the list.

  The order in which the calendars are listed determines the order in which events are listed when events from multiple calendars occur in the same time slot. Events from the calendar at the top of the list are displayed first.
- A color to change the color used for the events from this calendar.

19.3 Setting Events Service Task Flow Properties

The Events service task flow has associated properties, which users with sufficient privileges can access through the Component Properties dialog in Oracle Composer (Figure 19–35). Many properties are common to all task flows, and the method for accessing task flow properties is the same from task flow to task flow. Common task flow properties and how to access them are discussed in Section 10.4, "Setting Properties on Page Content."

Figure 19–35 Events Service Task Flow Component Properties



The properties on the **Parameters** tab of the Component Properties dialog control the default task flow content and facilitate the wiring of the task flow to page parameters and page definition variables. These properties are unique to the task flow type. For information about wiring pages and components, see Chapter 11, "Wiring Pages, Task Flows, Portlets, and UI Components."

Changes to the properties on the **Display Options**, **Style**, and **Content Style** tabs affect the appearance and behavior of the task flow for all users. These properties are common to all task flows. For more information, see Section 10.4, "Setting Properties on Page Content."

The contents of the **Events** tab depend on the events supported by the task flow. For more information, see Section 10.4.8, "Working with Component Contextual Events."

The **Child Components** tab displays all of the components contained within the current component. It provides controls for rearranging, showing, and hiding child components. Not all components contain children. So you may find this tab devoid of content. For more information, see Section 10.4.6, "Working with Child Components."

All properties on the **Parameters** and **Display Options** tabs provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the **Edit** icon next to a property field to open the editor. For more information about using the editor and for descriptions of common EL expressions, see Section 10.4.5, "Using Expression Language (EL) Expressions with Component Properties."

Table 19–1 describes the properties that are unique to the Events service task flow.

Table 19–1 Events Service Task Flow Properties: Parameters Tab

Property	Description
`Calendar Overlay Style`	Whether calendar overlay is enabled. Valid values are: ■ Empty (default): No calendar overlay ■ `FULL`: Calendar overlay is enabled in Full mode ■ `MINI`: Calendar overlay is enabled in Mini mode, which takes up less screen space
`Customization ID`	A unique identifier for event view customization. Customization ID assists with maintaining the association of this task flow instance with its customization and personalization settings. This value is set automatically. Do not edit this value.
`Default Current Date`	The default current date on the calendar. Valid values are: ■ Empty (default): The current date (that is, today's date) ■ Any date using the format `mm/dd/yyyy`
`Disable Personalize and Customize`	Whether users can personalize or customize the task flow. Valid values are: ■ `false`: Users can personalize and customize the task flow ■ `true`: Users cannot personalize or customize the task flow
`Group Space`	The name of the group space that is the source of listed events. Valid values are: ■ Empty: Task flow displays events for the current group space (that is, the group space in which it is placed) ■ Any group space display name: Task flow displays events for the named group space In WebCenter Spaces, the group space display name is available on the **General** tab of the group space **Settings** page.
`Maximum Calendars`	The maximum number of calendars that a user can add to the task flow. When the maximum is reached, the Add Calendar icon no longer appears in the task flow. Default value: 20
`Maximum Enabled Calendars`	The maximum number of calendars that a user can display simultaneously. This value must not be greater than the value specified for **Maximum Calendars**. Default value: The same value as that specified for **Maximum Calendars**

20

Working with the Instant Messaging and Presence Service (IMP)

This chapter describes how to use the features provided through the Instant Messaging and Presence (IMP) service. The IMP service lets you see the presence status of other authenticated application users. Additionally, it provides instant access to interaction options, such as instant messages and mails.

This chapter includes the following sections:

- Section 20.1, "What You Should Know About the IMP Service"
- Section 20.2, "Working with IMP Service Features and Task Flows"
- Section 20.3, "Setting IMP Task Flow Properties"

Audience

This chapter is intended for WebCenter Spaces users interested in viewing, creating, and managing instant messaging and presence. Much of this information also applies to custom WebCenter applications, though it is written with WebCenter Spaces users in mind. (For information about custom WebCenter applications, see "Integrating the Instant Messaging and Presence Service" in *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter*.)

Your application administrator has the authority to expose or hide task flows from a particular service. Tasks discussed in this chapter are not available to you if the relevant service is hidden.

20.1 What You Should Know About the IMP Service

The IMP service enables you to observe the presence status of other authenticated users (online, offline, busy, or away) and provides instant access to interaction options, such as instant messages (IM), mail, and phone conferences. Any WebCenter service that has a user name can integrate with the IMP service; for example, Discussions, Documents, or Mail. Wherever a user is indicated, for example as the author of a document in the document library, you can see an icon (Figure 20–1) depicting the presence state of that user.

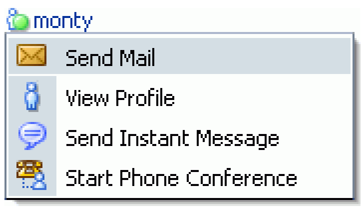
Figure 20–1 The Presence Icon for Online Users

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 context menu (Figure 20–2).

Figure 20–2 The Presence Icon Context Menu



From the context menu you can:

- Send mail to the user. For more information, see Section 20.2.2, "Sending a Mail Message from the Presence Icon Menu."
- View the user's profile. For more information, see Section 25.2.2.1, "Viewing Profile Details."
- Send an instant message to the user. For more information, see Section 20.2.3, "Sending an Instant Message from the Presence Icon Menu."
- Initiate a phone conference with the user. For more information, see Section 20.2.4, "Initiating a Phone Conference from the Presence Icon Menu."
- Change credentials, which works as an alternative to using an external application. This option is available with Microsoft Office Live Communications Server (LCS) 2005 and Microsoft Office Communications Server (OCS) 2007.

Note: The options that display on the context menu depend on what services are available to your WebCenter Spaces application, how those services are configured, and which services are supported by the back-end presence server. For example, the Phone Conference option is supported by Oracle WebLogic Communications Services (OWLCS) only.

20.2 Working with IMP Service Features and Task Flows

Many WebCenter task flows 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 contact the author of that post, you can do so directly from the Discussions task flow.

This section includes the following subsections:

- Section 20.2.1, "Viewing the Status of Other Users"
- Section 20.2.2, "Sending a Mail Message from the Presence Icon Menu"
- Section 20.2.3, "Sending an Instant Message from the Presence Icon Menu"
- Section 20.2.4, "Initiating a Phone Conference from the Presence Icon Menu"

- Section 20.2.5, "Adding a Buddies Task Flow to a Page"
- Section 20.2.6, "Working with the Buddies List"

20.2.1 Viewing the Status of Other Users

Many task flows support on-the-spot communication with other users. That is, wherever a task flow includes a **Presence** icon (Figure 20–1), you can start an instant chat or meeting 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 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 expiry 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 20–1 describes the presence state each **Presence** icon indicates.

Table 20–1 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.

20.2.2 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:

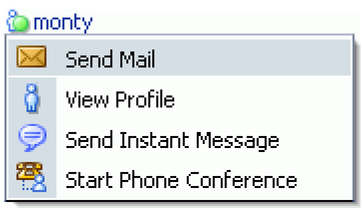
1. Log in and locate a **Presence** icon (Figure 20–1) for the person you want to contact.

   For example, you can find **Presence** icons in the Buddies task flow in the Sidebar (for more information, see Section 20.2.6, "Working with the Buddies List"), associated with documents and discussion topics, and anywhere a task flow is configured to support IMP.

2. Click the **Presence** icon associated with the user you want to contact.

   For example, in Figure 20–3 the **Presence** icon is associated with the user `monty`.

Figure 20–3 The Presence Icon Associated with the User monty

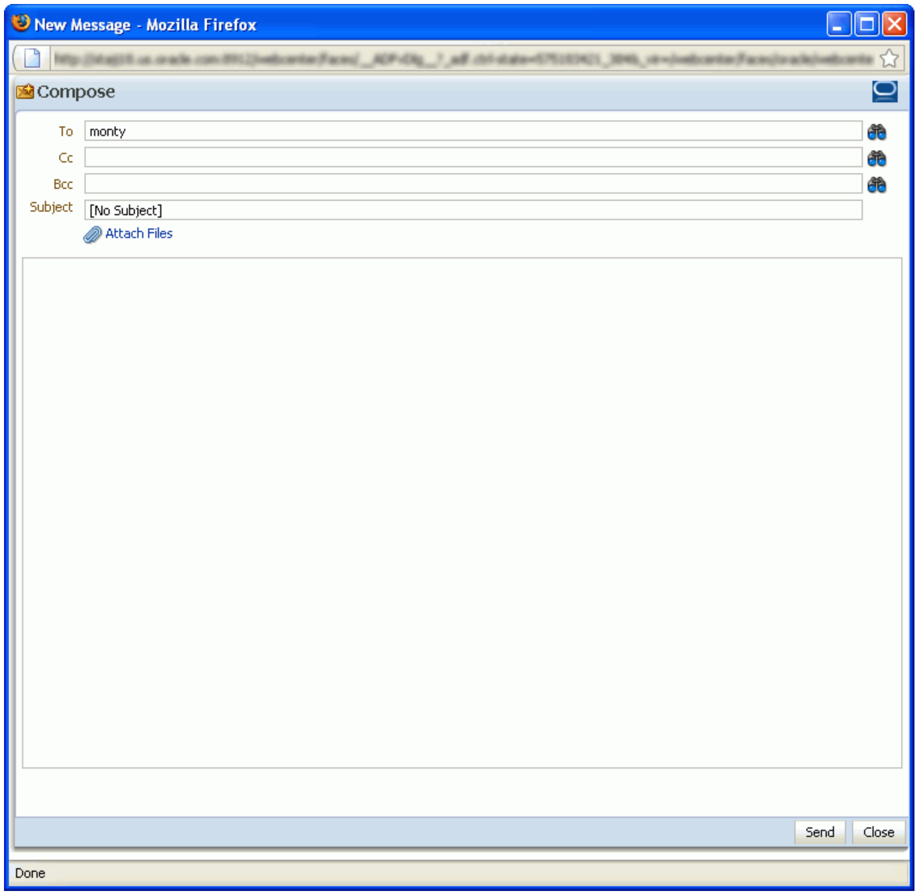


3. From the menu, choose **Send Mail**.

   You may 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 3, "Setting Your Personal Preferences."

4. Compose your message and click **Send** (Figure 20–4).

Figure 20–4 Sending Mail Using the IMP Service



20.2.3 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.

- If the back-end presence server is Microsoft Live Communications Server (LCS) 2005, then install Microsoft Communicator.
- If the back-end presence server is Microsoft Office Communications Server (OCS) 2007, then install Microsoft Communicator.
- If the back-end presence server is Oracle WebLogic Communications Server (OWLCS), then install Oracle Communicator.

Contact your administrator if you are not sure which client to install or how to connect to the presence server.

To send an instant message:

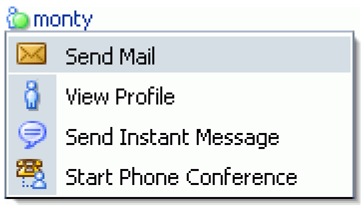
1. Log in and locate a **Presence** icon (Figure 20–1) for the person you want to contact.

   For example, you can find **Presence** icons in the Buddies task flow in the Sidebar (for more information, see Section 20.2.6, "Working with the Buddies List"), associated with documents and discussion topics, and anywhere a task flow is configured to support IMP.

2. Click the **Presence** icon associated with the user you want to contact.

   For example, in Figure 20–5 the **Presence** icon is associated with the user `monty`.

Figure 20–5 The Presence Icon Associated with the User monty



3. From the menu, choose **Send Instant Message**.

   WebCenter invokes your instant messaging client, and starts a chat session with the selected user.

20.2.4 Initiating a Phone Conference from the Presence Icon Menu

If you are using Oracle WebLogic Communications Server (OWLCS) as the presence server, then wherever you see a **Presence** icon, you can initiate a phone conference with its associated user.

To initiate a phone conference:

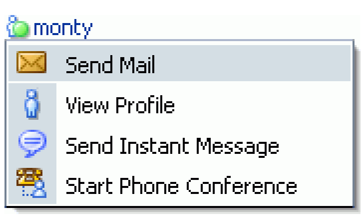
1. Log in and locate a **Presence** icon (Figure 20–1) for the person you want to contact.

   For example, you can find **Presence** icons in the Buddies task flow in the Sidebar (for more information, see Section 20.2.6, "Working with the Buddies List"), associated with documents and discussion topics, and anywhere a task flow is configured to support IMP.

2. Click the **Presence** icon associated with the user you want to contact.

   For example, in Figure 20–6 the **Presence** icon is associated with the user `monty`.

Figure 20–6 The Presence Icon Associated with the User monty



3. From the menu, choose **Start Phone Conference**.

   OWLCS places a call to you and then to the target user, using the phone numbers specified in the user profiles.

   > **Tip:** If you encounter an error when initiating a phone conference with other WebCenter users, ensure that user names are lowercase.

20.2.5 Adding a Buddies Task Flow to a Page

For the steps to add a Buddies task flow to a page, see Section 10.1.4, "Adding Task Flows to a Page."

20.2.6 Working with the Buddies List

Your Buddies list is useful for determining the online availability of your personal contacts and for connecting with other users through a variety of services.

The Buddies list is available in the WebCenter Spaces Sidebar or as a task flow on a page.

This section includes the following subsections:

- Section 20.2.6.1, "What You Should Know About the Buddies List"
- Section 20.2.6.2, "Sorting Buddies"
- Section 20.2.6.3, "Filtering Buddies"
- Section 20.2.6.4, "Viewing the Status of Contacts"

20.2.6.1 What You Should Know About the Buddies List

Your Buddies list is always personal. You control who is included on the list, and your view of the list is unique to you. For example, in WebCenter Spaces, as you move from your personal space to group spaces, the contacts displayed in the list do not change.

Your Buddies list is a reflection of the contacts you have identified for your local chat application, provided through either LCS, OCS or OWLCS. WebCenter Spaces exposes your contacts through the Buddies list in the Sidebar to provide a single point of access to all of your collaboration tools, including chat, mail, discussions, and so on.

A connection between Oracle WebCenter and LCS or OCS or OWLCS that provides your chat application enables a seamless exchange of information between your chat application and WebCenter. For example, when you add a new contact to your chat application, that contact also is automatically added to your Buddies list. The same holds true when you delete a chat contact.

You can sort your Buddies list into meaningful groups and filter it to locate a particular contact. Context menus, available when you click a contact or the contact's **Presence** icon, provide options for initiating a chat session, sending a mail, or making some other type of connection with your contact on the spot.

The options that display on the context menu depend on the services your administrator has made available to the application.

Note: If all your buddies are showing as offline and you do not think this is correct, then there could be an issue with the back-end server. Check your buddies list in your desktop client. If the presence state is correct in your desktop client, but still showing offline in WebCenter Spaces, then contact your administrator to ensure that the IMP connection is set up correctly.

If you click a buddy and the context menu does not appear, then click the **Refresh** icon next to the Buddies task flow. The context menu will appear. This can be a problem in Internet Explorer 7.0.

20.2.6.2 Sorting Buddies

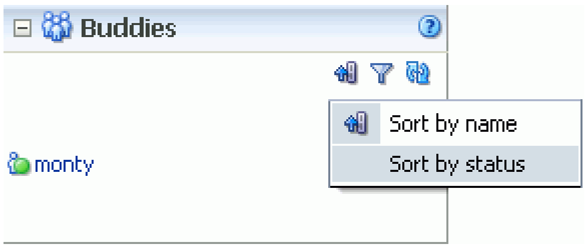
You can sort your Buddies list either by name or by status.

To sort your Buddies list:

1. Log in to WebCenter and locate your Buddies list either in the WebCenter Spaces Sidebar, or in a Buddies task flow.

2. In the Buddies list, click the **Sorting options** icon, and choose a sort option (Figure 20–7).

Figure 20–7 Sorting Options on the Buddies List



Choose from:

- **Sort by name**—To sort the list alphabetically, from 1 to 9 and a to z
- **Sort by status**—To sort by the contact's status: *online*, *busy*, *away*, *offline*

20.2.6.3 Filtering Buddies

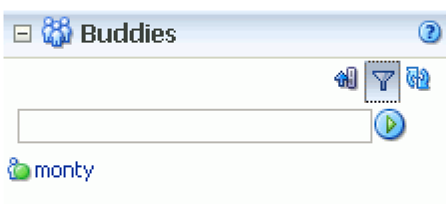
Use filtering to help find a particular contact in your Buddies list.

To filter the buddies list:

1. Log in and locate your Buddies list either in the WebCenter Spaces Sidebar or in a Buddies task flow.
2. In the Buddies list, click the **Filter buddies** icon.

   A filter field appears in the task flow (Figure 20–8).

Figure 20–8 The Filter Field for Filtering the Buddies List



3. Enter a full or partial name in the field, and click the icon to the right of the field to apply the filter.
4. The Buddies list refreshes, displaying only those contacts that match the filter term.

> **Note:** Filtering searches against a listed buddy's user name and mail address. For example, if your filter criterion is "m" and filtering results include "vicki", it means that Vicki's mail address includes an "m", for example, vicki.mancuso@example.com.

5. To return the Buddies list to its default display, click the **Filter buddies** icon again.

20.2.6.4 Viewing the Status of Contacts

You can determine whether a contact is busy, online, offline, or online but away by looking at the **Presence** icon associated with a particular contact on your Buddies list. For more information, see Section 20.2.1, "Viewing the Status of Other Users."

20.3 Setting IMP Task Flow Properties

The Buddies task flow has associated properties, which users with sufficient privileges can access from the Component Properties dialog in Oracle Composer. Many properties are common to all task flows, and the method for accessing task flow properties is the same from task flow to task flow. Common task flow properties and how to access them are discussed in Section 10.4, "Setting Properties on Page Content."

The Buddies task flow does not have any unique properties, and therefore no **Parameters** tab in the Component Properties dialog box.

Changes to the properties on the **Display Options**, **Style**, and **Content Style** tabs affect the appearance and behavior of the task flow for all users. These properties are common to all task flows. For more information, see Section 10.4.4, "Working with Component Display Options" and Section 10.4.7, "Working with Style and Content Style Properties."

The content of the **Events** tab depends on the events supported by the task flow. For more information, see Section 10.4.8, "Working with Component Contextual Events."

The **Child Components** tab displays all of the components contained within the current component. It provides controls for rearranging, showing, and hiding child components. Not all components contain children. So you may find this tab devoid of content. For more information, see Section 10.4.6, "Working with Child Components."

All properties on the **Parameters** and **Display Options** tabs provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the **Edit** icon next to a property field to open the editor. For more information about using the editor and for descriptions of common EL expressions, see Section 10.4.5, "Using Expression Language (EL) Expressions with Component Properties."

21

Working with the Links Service

This chapter describes how to use the features provided through the Links service. The Links service provides a way to view, access, and associate related information.

This chapter includes the following sections:

- Section 21.1, "What You Should Know About the Links Service"
- Section 21.2, "Working with Links Service Features"

Audience

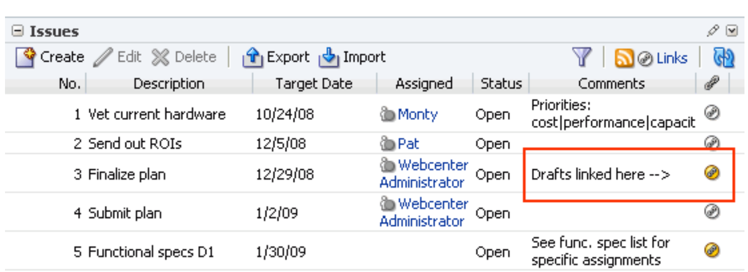
This chapter is intended for WebCenter Spaces users interested in viewing, creating, and managing links. Much of this information also applies to custom WebCenter applications, though it is written with WebCenter Spaces users in mind. (For information about custom WebCenter applications, see "Integrating the Links Service" in *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter*.)

Your application administrator has the authority to expose or hide task flows from a particular service. Tasks discussed in this chapter are not available to you if the relevant service is hidden.

21.1 What You Should Know About the Links Service

Linking gives users a means of explicitly associating two objects with each other through easy-access reference points, called *links*. The Links service assists with setting up these links from one application object 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 21–1). This service also provides a quick way to create new objects when establishing a link.

Figure 21–1 A Link on a List Row



In WebCenter Spaces, links are scoped to both personal and group spaces. For example, the links that display in the *Finance* group space differ from the links that display in the *Infrastructure* group space, even though links are accessed from the same places in both group spaces. The objects to which you can link also depend on which services have been provisioned for your application.

Anywhere you see a **Links** icon, you can create a link to both new and existing content.

There are two **Links** icons that each indicate the state of the Links dialog:

- The gray **Links** icon (Figure 21–2) indicates that no links are present in the Links dialog.

Figure 21–2 The Links Icon (No Links Present)

- The gold **Links** icon (Figure 21–3) indicates that links are present in the Links dialog.

Figure 21–3 The Links Icon (Links Present)

Use the **Link to Existing** option in the Links dialog to link to existing application objects, such as documents, discussion forum topics, and announcements. For more information, see Section 21.2.1, "Linking to Existing Objects."

Use the **Link to New** option in the Links dialog to both create an application object 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 items. For more information, see Section 21.2.2, "Linking to New Objects."

You can create links from announcements, discussions, documents, events, lists, and pages.

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, in WebCenter Spaces, the items you can link to from a personal space differ from those you can link to from a group space. Table 21–1 lists the types of objects you can link to and from.

Table 21–1 Linking to Objects

Object Type	Link to New?	Link to Existing?	Personal	Group
Announcement	No	Yes	No	Yes
Discussion Topic	Yes	Yes	No	Yes
Document	Yes	Yes	Yes	Yes
Event	Yes	Yes	No	Yes
Note	Yes	No	Yes	Yes
URL	Yes	No	Yes	Yes

Given the right permission, other users can see your links, and you can see other users' links. For most services, what you can do with a link (such as view, create, delete) is handled by your Links permission. However, with the Notes service, you can delete a link only if you also have delete permission on the Notes service. For more information on Links permission, see the section "Managing Application Roles and Permissions" in the *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter*.

What you can do with the *linked object* is handled by the target object's security.

Links retain their originating location. For example, if you create a link on a list row, then that link appears only on that row, and not on all the other rows in the same list. Suppose you link to an article about a particular widget from the list row that describes that widget. The link to that article appears only on that row's Links dialog (Figure 21–4). It does not display on the Links dialog associated with the other rows on the same list.

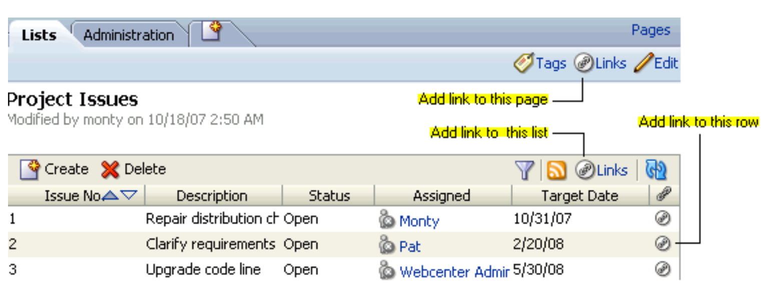
Figure 21–4 The Links Dialog

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.

21.2 Working with Links Service Features

Many WebCenter task flows include a linking capability that enables you to associate application objects with other application objects, and with internal and external web pages. For example, the List task flow automatically includes a **Links** icon on each list and on each list row. Additionally, the **Lists** page has its own link (Figure 21–5).

Figure 21–5 Link Icons on the Lists Page



Use the Links feature to link to 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 Spaces page. No more fruitless wandering through different lines of business to find information.

This section describes how to link one thing to another in WebCenter applications and how to access those links.

This section includes the following subsections:

- Section 21.2.1, "Linking to Existing Objects"
- Section 21.2.2, "Linking to New Objects"
- Section 21.2.3, "Accessing Link Targets"
- Section 21.2.4, "Deleting a Link"

21.2.1 Linking to Existing Objects

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 application.

This section includes the following subsections:

- Section 21.2.1.1, "Opening the Links Dialog to Link to Existing Objects"
- Section 21.2.1.2, "Linking to an Existing Announcement"
- Section 21.2.1.3, "Linking to an Existing Discussion Forum Topic"
- Section 21.2.1.4, "Linking to an Existing Document"
- Section 21.2.1.5, "Linking to an Existing Event"

21.2.1.1 Opening the Links Dialog to Link to Existing Objects

To create a link to an existing object, first go to the object from which you want to link and open the Links dialog. From there, the steps vary depending on the type of object you are linking to.

To open the Links dialog:

1. Log in to WebCenter, and go to the object from which you want to link.
2. Click the object's associated **Links** icon (Figure 21–6).

Figure 21–6 The Links Icon

   This opens the Links dialog (Figure 21–7).

Figure 21–7 The Links Dialog

3. From the Links dialog, select **Link to Existing** and then the type of object you want to link to.

   For information about what to do next see:

   - Section 21.2.1.2, "Linking to an Existing Announcement"
   - Section 21.2.1.3, "Linking to an Existing Discussion Forum Topic"
   - Section 21.2.1.4, "Linking to an Existing Document"
   - Section 21.2.1.5, "Linking to an Existing Event"

21.2.1.2 Linking to an Existing Announcement

You can bring timely announcements to the highest traffic areas in your application by linking to them.

To link to an existing announcement:

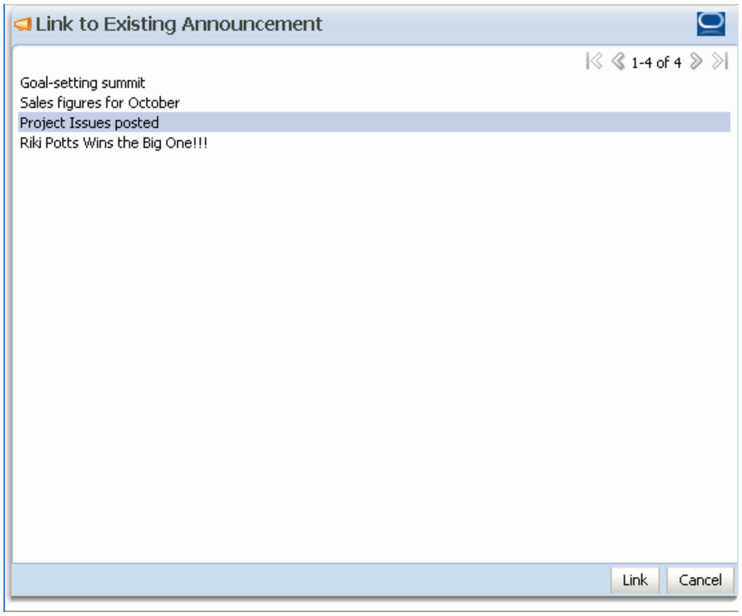
1. Go to the object from which you want to link to an announcement and click the **Links** icon.

   For more information, see Section 21.2.1.1, "Opening the Links Dialog to Link to Existing Objects."

2. From the Links dialog, select **Link to Existing** and then **Announcement**.

   A window listing announcements opens (Figure 21–8).

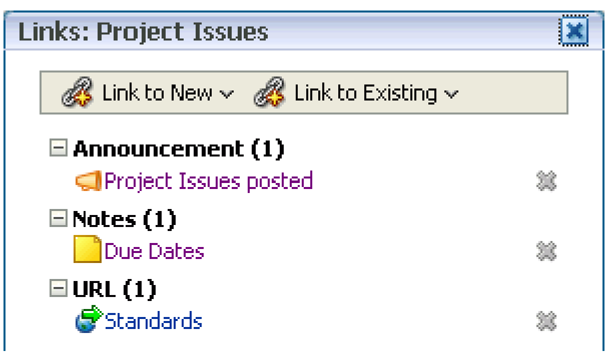
Figure 21–8 Existing Announcements



3. In the window, click the announcement to which you want to link.
4. Click the **Link** button.

   The title of the selected announcement appears on the list of links in the Links dialog (Figure 21–9).

Figure 21–9 Newly-Added Announcement on Links Dialog



5. Close the Links dialog.

21.2.1.3 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.

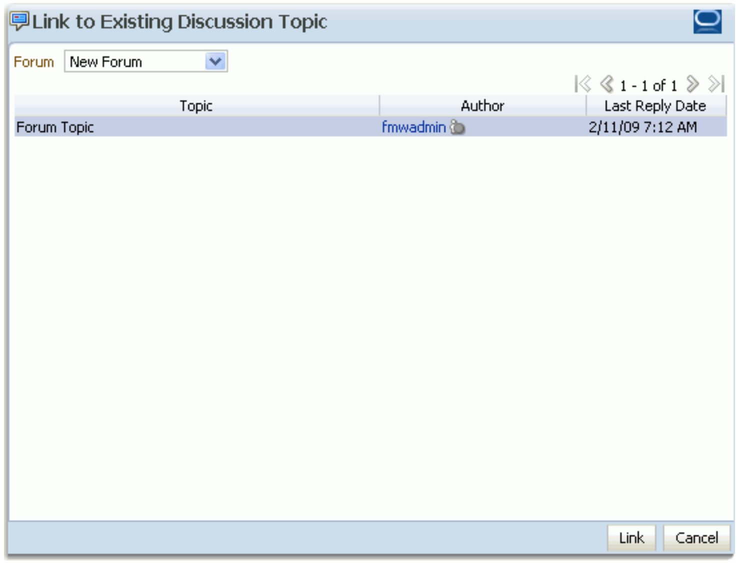
To link to an existing discussion forum topic:

1. Go to the object from which you want to link to a discussion forum message and click the **Links** icon.

   For more information, see Section 21.2.1.1, "Opening the Links Dialog to Link to Existing Objects."
2. From the Links dialog, select **Link to Existing** and then **Discussion**.

A window listing available topics opens (Figure 21–10). If the group space or application supports multiple discussion forums, then a dropdown list at the top enables you to switch to a different forum.

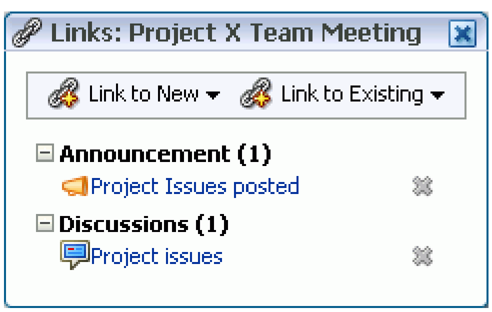
Figure 21–10 Existing Discussion Topics



3. Click the discussion topic to which you want to link.
4. Click the **Link** button.

   The title of the selected discussion topic appears on the list of links in the Links dialog (Figure 21–11).

Figure 21–11 Newly-Added Discussion Topic on Links Dialog



5. Close the Links dialog.

21.2.1.4 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:

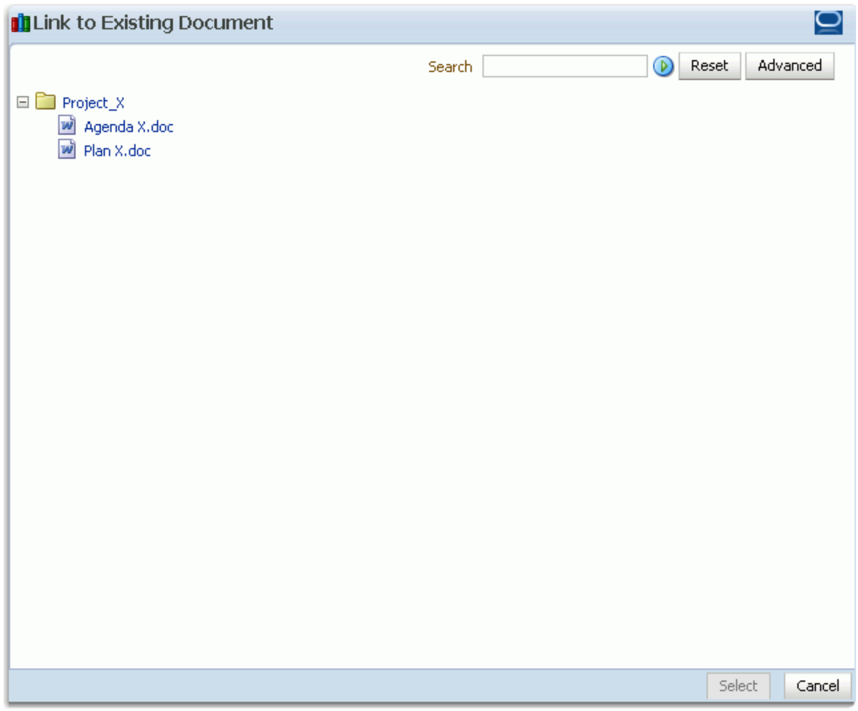
1. Go to the object from which you want to link to a document and click the **Links** icon.

For more information, see Section 21.2.1.1, "Opening the Links Dialog to Link to Existing Objects."

2. From the Links dialog, select **Link to Existing** and then **Document**.

   The Link to Existing Document dialog opens (Figure 21–12).

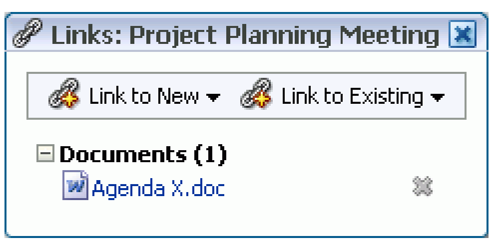
Figure 21–12 Existing Documents



3. Select the document, and click **Select**.

   The document link appears on the list of links in the Links dialog (Figure 21–13).

Figure 21–13 A Document Link on the Links Dialog



4. Close the Links dialog.

21.2.1.5 Linking to an Existing Event

You can link to information about events that are relevant to the current object. 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:

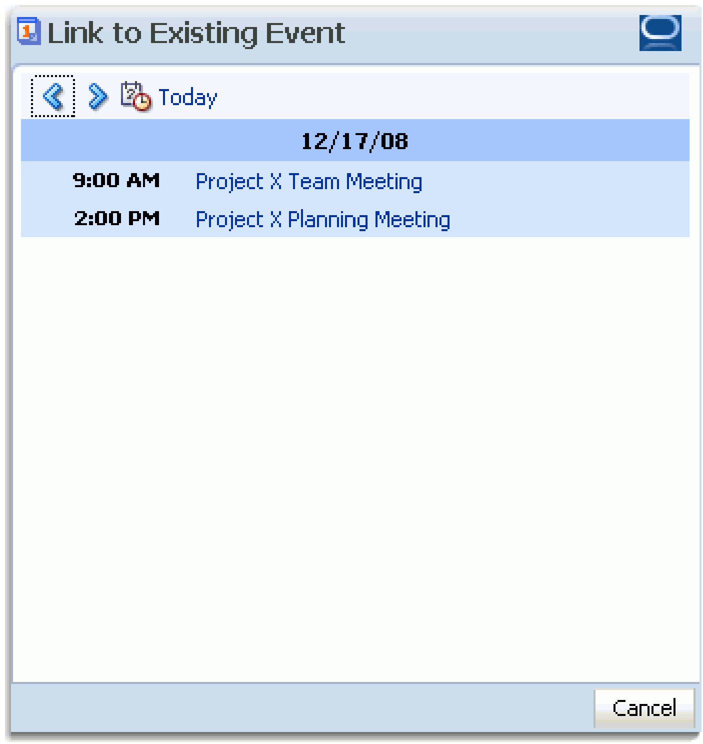
1. Go to the object from which you want to link to an event and click the **Links** icon.

For more information, see Section 21.2.1.1, "Opening the Links Dialog to Link to Existing Objects."

2. From the Links dialog, select **Link to Existing** and then **Event**.

   A window opens listing all of the events you can access.

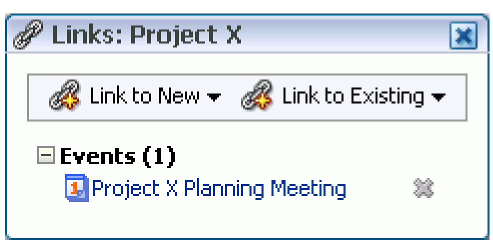
Figure 21–14 Existing Events



3. In the window, click the event to which you want to link.

   The title of the selected event appears on the list of links in the Links dialog (Figure 21–15).

Figure 21–15 Newly-Added Event on Links Dialog



4. Close the Links dialog.

21.2.2 Linking to New Objects

When you use **Link to New**, you accomplish two things at the same time: you create a new object, and you create a link to that object. 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 objects. It contains the following subsections:

- Section 21.2.2.1, "Opening the Links Dialog to Link to a New Object"
- Section 21.2.2.2, "Adding and Linking to a Discussion Forum Topic"
- Section 21.2.2.3, "Adding and Linking to a Document"
- Section 21.2.2.4, "Adding and Linking to an Event"
- Section 21.2.2.5, "Adding and Linking to a Note"
- Section 21.2.2.6, "Linking to a Web Page"

21.2.2.1 Opening the Links Dialog to Link to a New Object

When you want to create a link to a new object, the first thing to do is go to the object from which you want to link and open the Links dialog. From there the steps vary depending on the type of object you are linking to.

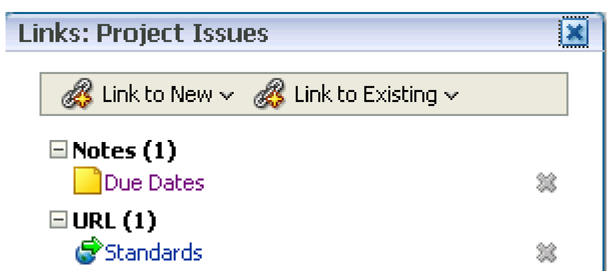
To open the Links dialog:

1. Log in to WebCenter, and go to the object from which you want to link.
2. Click the object's associated **Links** icon (Figure 21–16).

Figure 21–16 The Links Icon

This opens the Links dialog (Figure 21–17).

Figure 21–17 The Links Dialog



3. From the Links dialog, select **Link to New** and then the type of object you want to link to.

   For information about what to do next see:

   - Section 21.2.2.2, "Adding and Linking to a Discussion Forum Topic"
   - Section 21.2.2.3, "Adding and Linking to a Document"
   - Section 21.2.2.4, "Adding and Linking to an Event"
   - Section 21.2.2.5, "Adding and Linking to a Note"
   - Section 21.2.2.6, "Linking to a Web Page"

21.2.2.2 Adding and Linking to a Discussion Forum Topic

You can create a new thread directly from the object that first prompted the discussion, adding a link at the same time.

To link to a new discussion forum topic:

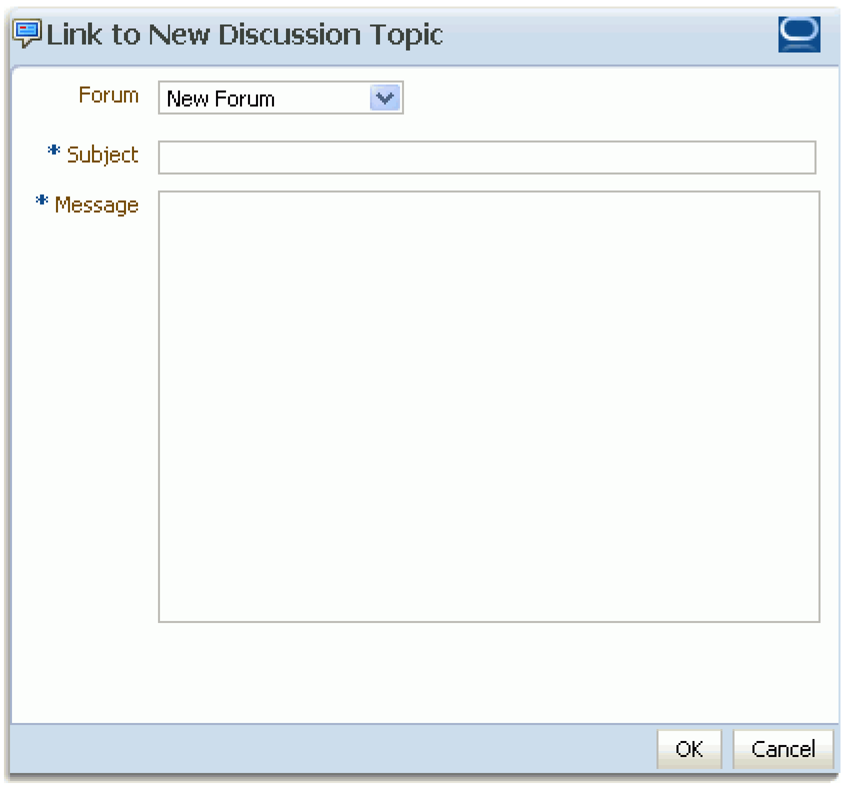
1. Go to the object from which you want to link to a new discussion forum topic and click the **Links** icon.

   For more information, see Section 21.2.2.1, "Opening the Links Dialog to Link to a New Object."

2. From the Links dialog, select **Link to New** and then **Discussion**.

   The Link to New Discussion Topic dialog opens (Figure 21–18).

Figure 21–18 Link to New Discussion Dialog



3. If the group space or application supports 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 topic content.
6. Click **OK**.

   The topic is added to the selected discussion forum, and the link is added to the Links dialog.

7. Close the Links dialog.

21.2.2.3 Adding and Linking to a Document

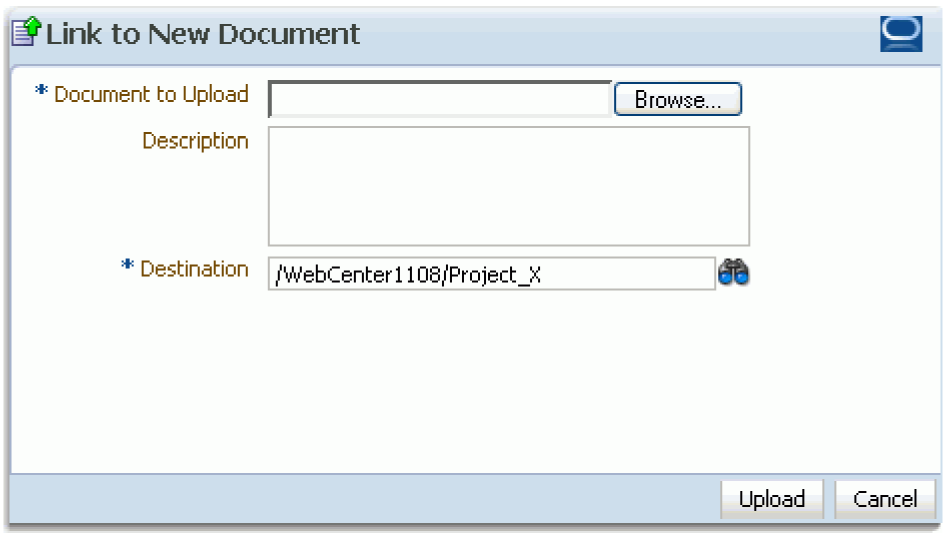
When viewing an object, such as a discussion forum topic, you might be aware of an informative document that would help other viewers of the object. You can add the document to the document library directly from the original object, adding a link to it at the same time.

To link to a new document:

1. Go to the object from which you want to link to a new document and click the **Links** icon.
2. From the Links dialog, select **Link to New** and then **Document**.

   The Upload Document dialog opens (Figure 21–19).

Figure 21–19 Link to New Document Dialog



3. Click the **Browse** button, and navigate to the location of the document you want to upload.
4. Select the document, and click **Open**.
5. Enter an optional description and change the default destination directory, if necessary. Click the **Browse** icon to locate a destination, if necessary.
6. Click **Upload**.

   The document is uploaded, and the link is added to the Links dialog.

   The location of the uploaded document depends on where you initiated the linking action. The document could be uploaded to the selected group space's document library or to the root folder of your WebCenter's default document repository connection.
7. Close the Links dialog.

21.2.2.4 Adding and Linking to an Event

You can create a new event and immediately add a link to it, for example, to schedule a meeting to address issues raised in a discussion forum topic.

To add and link to a event:

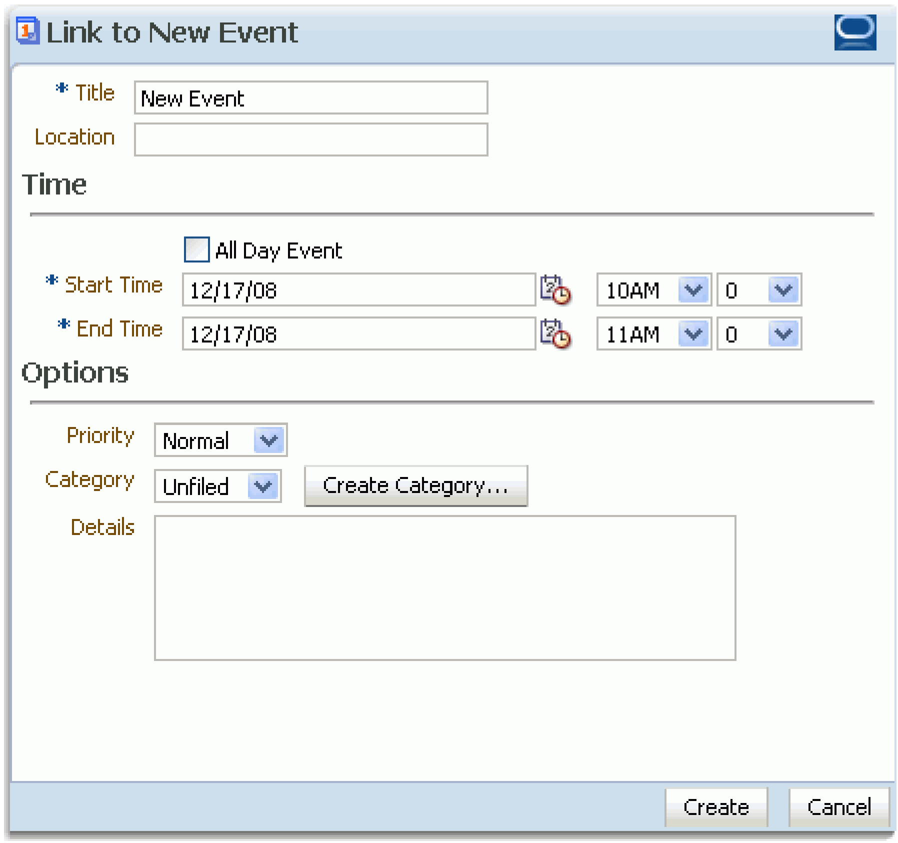
1. Go to the object from which you want to link to a new event and click the **Links** icon.

   For more information, see Section 21.2.2.1, "Opening the Links Dialog to Link to a New Object."

2. From the Links dialog, select **Link to New** and then **Event**.

   The Link to New Event dialog opens (Figure 21–20).

Figure 21–20 The Link to New Event Dialog



3. Enter event details as described in Section 19.2.4, "Scheduling Events."
4. Click the **Create** button.

   The event is added and the link is added to the Links dialog.

5. Close the Links dialog.

21.2.2.5 Adding and Linking to a Note

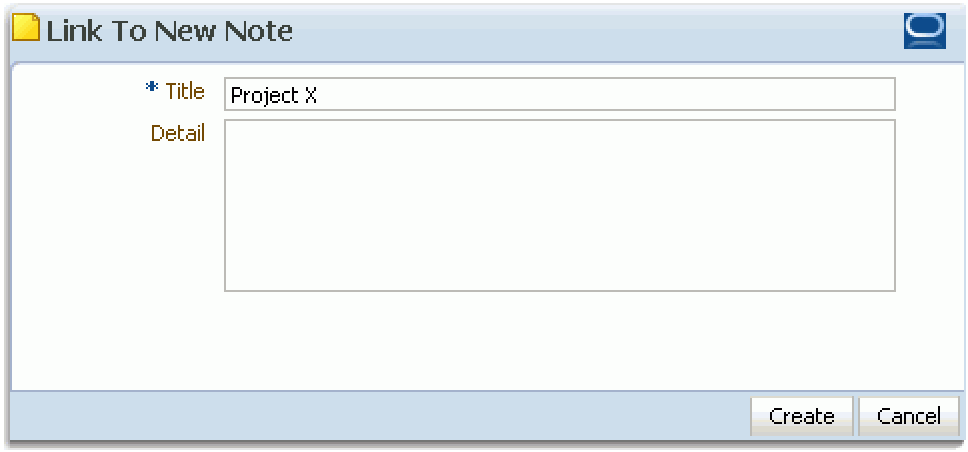
Create a personal note about another object, maybe to buy doughnuts for the team meeting, or to add an annotation to an object, like an online post-it note. The note is also linked to the object, serving as a reminder whenever you view it.

To add and link to a note:

1. Go to the object from which you want to add and link to a note and click the **Links** icon.
2. From the Links dialog, select **Link to New** and then **Note**.

The Link to New Note dialog opens (Figure 21–21).

Figure 21–21 The Link to New Note Dialog



3. In the **Title** field, enter a title for the note.
4. In the **Detail** field, enter the note content.
5. Click the **Create** button.

   The note link is added to the Links dialog.
6. Close the Links dialog.

21.2.2.6 Linking to a Web Page

Link to a web page to provide access to additional information.

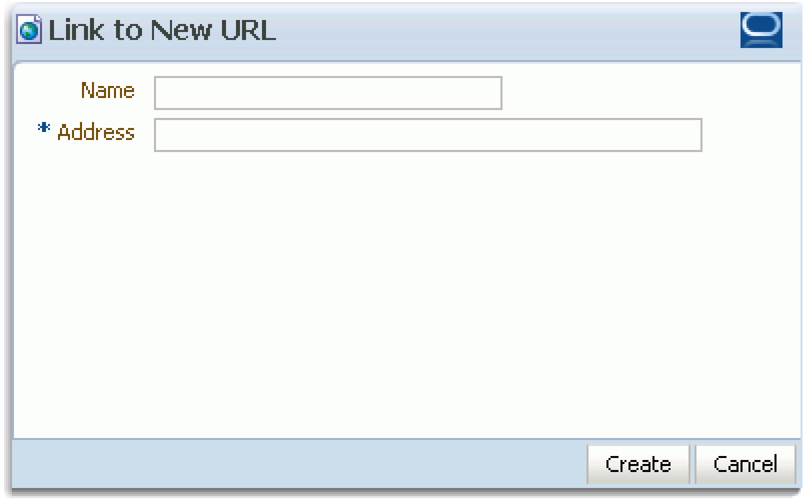
To link to a web page:

1. Go to the object from which you want to link to a web page and click the **Links** icon.

   For more information, see Section 21.2.2.1, "Opening the Links Dialog to Link to a New Object."
2. From the Links dialog, select **Link to New** and then **URL**.

   The Link to New URL dialog opens (Figure 21–22).

Figure 21–22 The Link to New URL Dialog



3. In the **Name** field, enter a 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 the **Create** button.

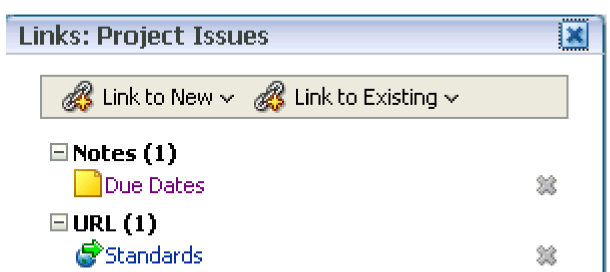
   The link is added to the Links dialog.
6. Close the Links dialog.

21.2.3 Accessing Link Targets

You access link targets from the Links dialog. Click the **Links** icon (Figure 21–23) associated with the item of interest, and then click the link you want to open on the resulting Links dialog (Figure 21–24).

Figure 21–23 The Links Icon

Figure 21–24 Links in the Links Dialog



21.2.4 Deleting a Link

When a link ceases to serve any purpose, you can delete it.

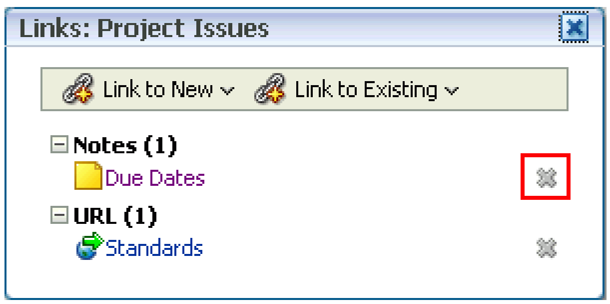
To delete a link:

1. Log in to WebCenter, and go to the object associated with the link you want to delete, such as the document, list, list row, or other item on which the link was created.
2. Click the **Links** icon (Figure 21–25).

Figure 21–25 The Links Icon

   This opens the Links dialog.
3. Click the **Delete** icon next to the link you want to delete (Figure 21–26).

Figure 21–26 Delete Icon Next to a Link



22

Working with the Lists Service

Use the task flows provided through the Lists service to create, publish, and manage lists in WebCenter Spaces. Create lists from prebuilt templates or create your own custom lists. When you create a list, it becomes available in the Oracle Composer Catalog (for more information, see Section 6.2.3, "Introducing the Oracle Composer Catalog"). You can add your lists from the Catalog to any page in the group space in which it was created.

The Lists service is available only in group spaces.

This chapter describes how to use the features offered through the Lists service. It contains the following sections:

- Section 22.1, "What You Should Know About the Lists Service"
- Section 22.2, "Working with Lists Service Task Flows"
- Section 22.3, "Setting Lists Service Task Flow Properties"

Audience

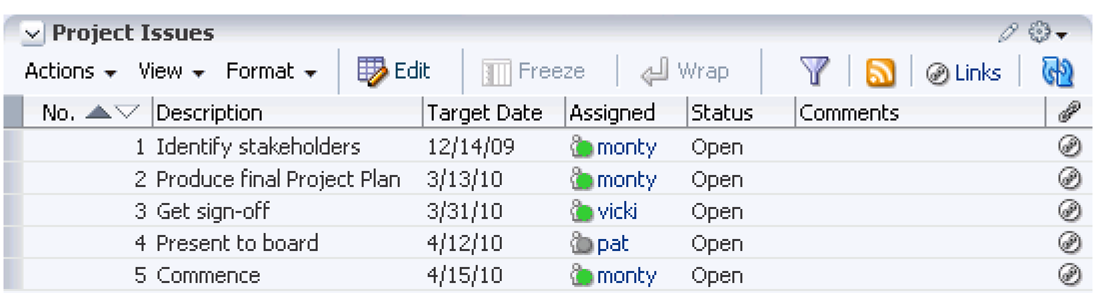
This chapter is for users interested in creating, populating, revising, importing, exporting, and removing lists and filtering list data.

Your application administrator has the authority to expose or hide a particular service's task flows. Tasks discussed in this chapter are not available to you if the relevant service is hidden.

22.1 What You Should Know About the Lists Service

The Lists service provides a means of creating, publishing, and managing lists (Figure 22–1).

Figure 22–1 A List Shown in a List Viewer Task Flow



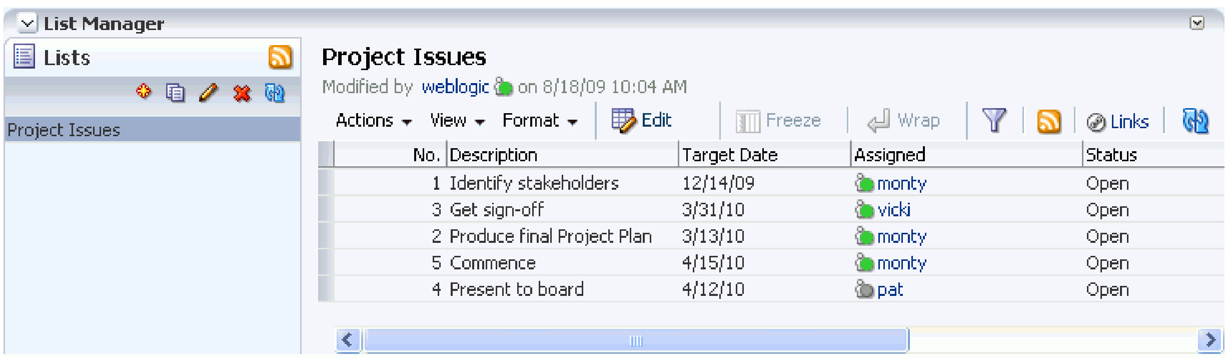
Lists are useful for many group space activities, such as tracking issues, capturing project milestones, publishing project assignments, and much more. The lists you create in WebCenter Spaces can be simple, single-column lists or more complex tables. For example, you can start with a list of team members, and then include columns for contact information, project role, and links to relevant documents, such as any plans or proposals associated with a team member.

The Lists service is exclusive to the WebCenter Spaces application, and, within the application, lists are scoped to group spaces. That is, you can create lists only in group spaces. You cannot create or post lists in personal spaces. The lists you create in a group space are unique to that group space. One group space cannot consume the lists created in another group space.

Create and populate lists using the Lists service's two task flows: List Manager (create and populate) and List Viewer (populate). Users must have appropriate permissions to perform actions on lists.

Use the List Manager task flow (Figure 22–2) to create and revise lists and list data and to view all of a group space's current lists.

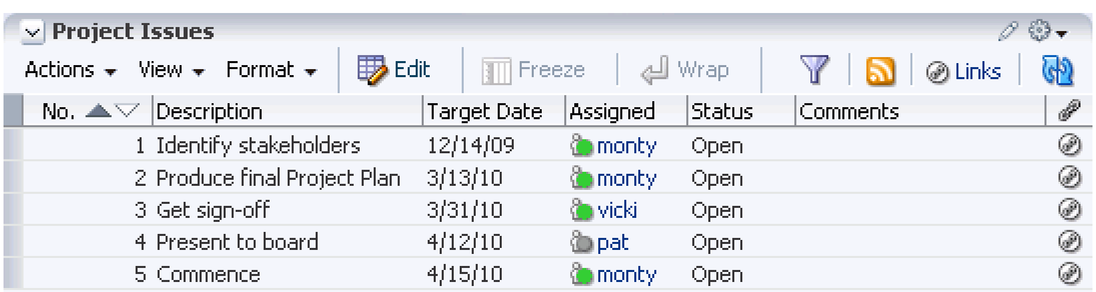
Figure 22–2 The List Manager Task Flow



The List Manager provides templates for rapid creation of lists and tools for designing and revising list structure. If you prefer, you can create a list from the beginning, adding and configuring all of the columns yourself. For more information, see Section 22.2.3, "Creating and Managing Lists."

The List Viewer task flow (Figure 22–3) provides a means of placing a particular list on a group space page.

Figure 22–3 A List Shown in a List Viewer Task Flow



The List Viewer provides easy access to all the tools required for creating new list rows, revising list data, importing/exporting list data, filtering list data, obtaining a list RSS feed, and linking to other WebCenter Spaces objects from the list and from a list row.

Additionally, the List Viewer provides access to customization and personalization tools that enable you to control the look of a particular list instance and the data it shows. For example, use list personalization and customization settings to provide a transparent band of color at specified intervals to list rows or columns or to apply filters to list data. For more information, see Section 22.2.5, "Personalizing and Customizing Lists."

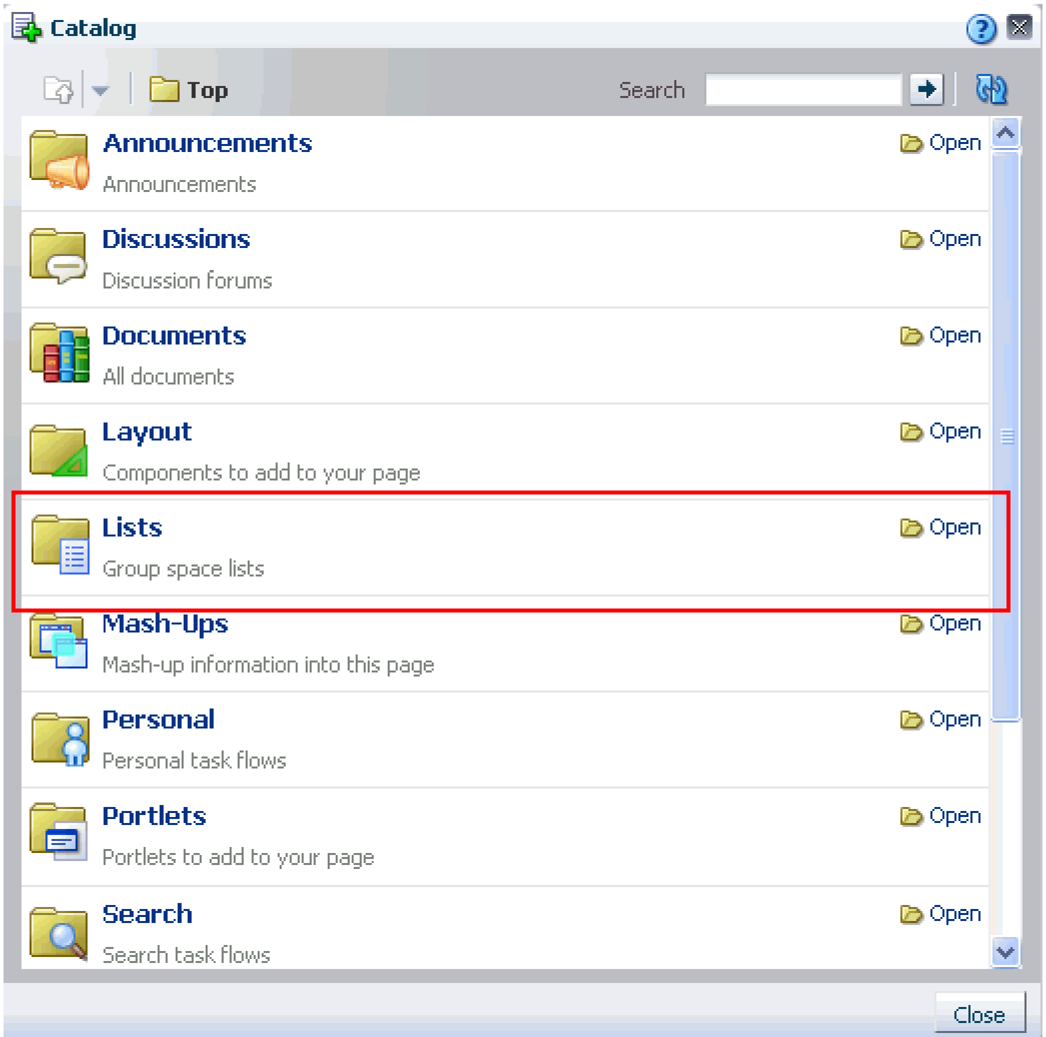
> **See Also:** For information about the differences between customization and personalization, see Section 10.2, "Customizing and Personalizing Page Content."

Use the List Manager and the List Viewer to add and revise list data throughout the life of the list (for more information, see Section 22.2.4, "Adding and Managing List Data"). Add and revise content directly within a task flow, or use the list Export/Import feature to send list data to an Excel 2007 file, revise it there, and then import it back into the original list in WebCenter Spaces (for more information, see Section 22.2.7, "Exporting a List to a Spreadsheet and Importing an Exported List").

Both the List Manager and individual group space lists (which are each rendered in a List Viewer task flow) are available through the Oracle Composer Catalog:

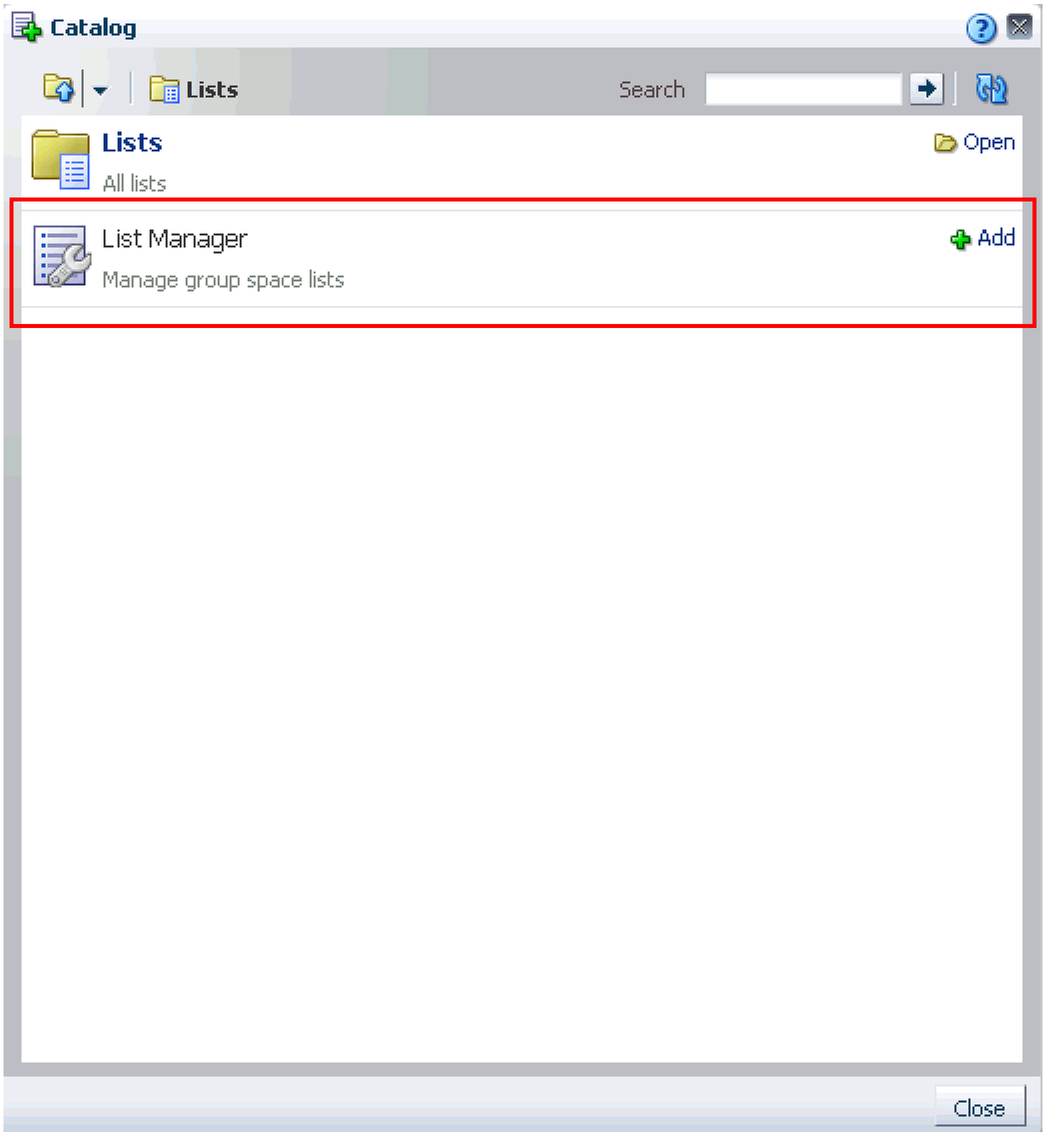
- The List Manager is located under the **Lists** folder (Figure 22–4).

Figure 22–4 Lists Folder in the Oracle Composer Catalog



To access the List Manager, click the **Open** link next to the **Lists** folder (or click the **Lists** folder name). The List Manager is shown with an **Add** link next to it (Figure 22–5).

Figure 22–5 The List Manager Under the Lists Folder in the Oracle Composer Catalog

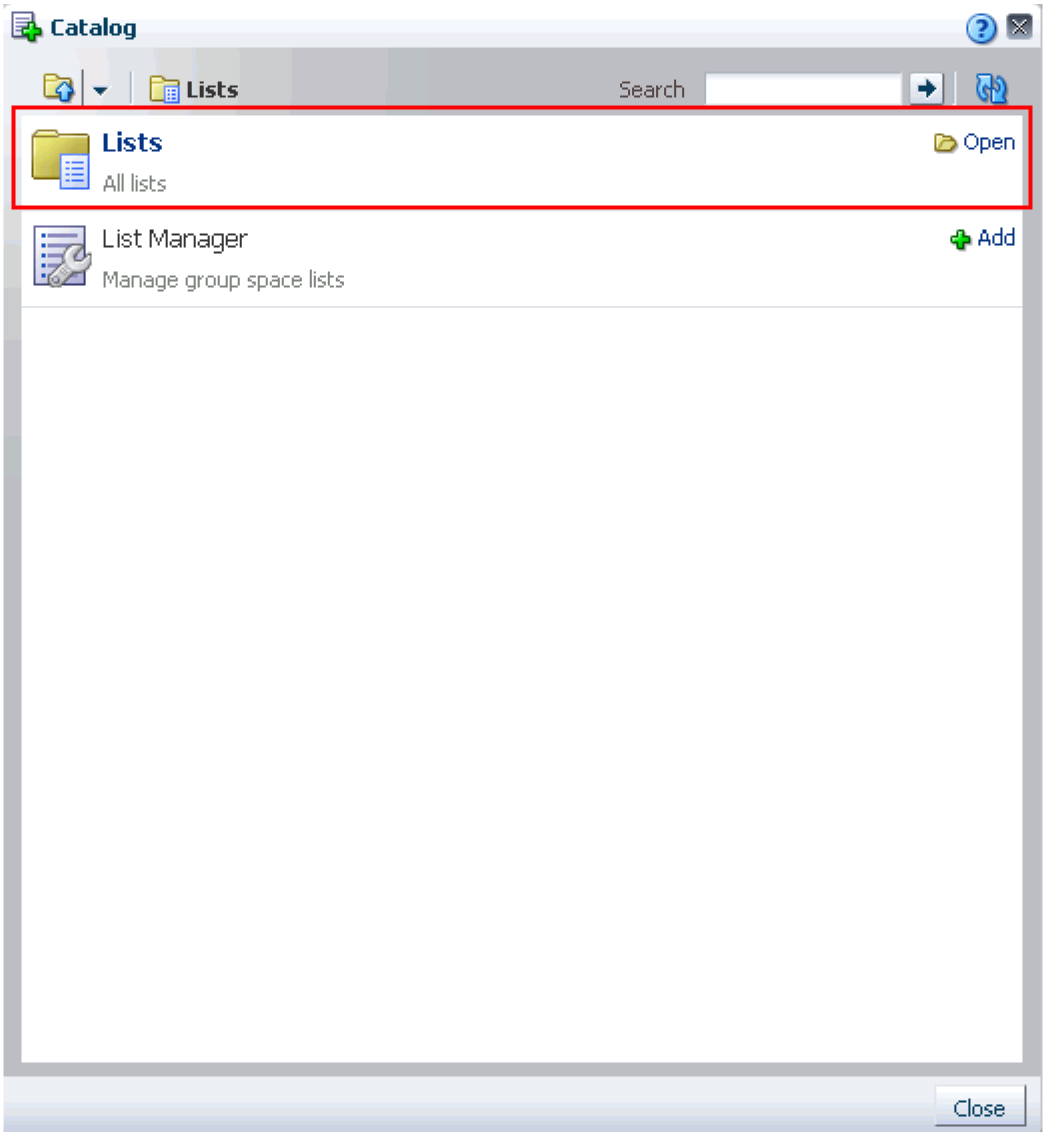


Click the **Add** link next to the List Manager to add it to the current page (for more information, see Section 10.1.4, "Adding Task Flows to a Page").

In addition to its availability in the Oracle Composer Catalog, the List Manager is exposed in every group space on a dedicated **Lists** page. If this page is not shown by default when you navigate to a particular group space, you can open it through the Manage Pages dialog. For more information, see Section 2.5, "Hiding, Showing, Opening, and Closing Pages."

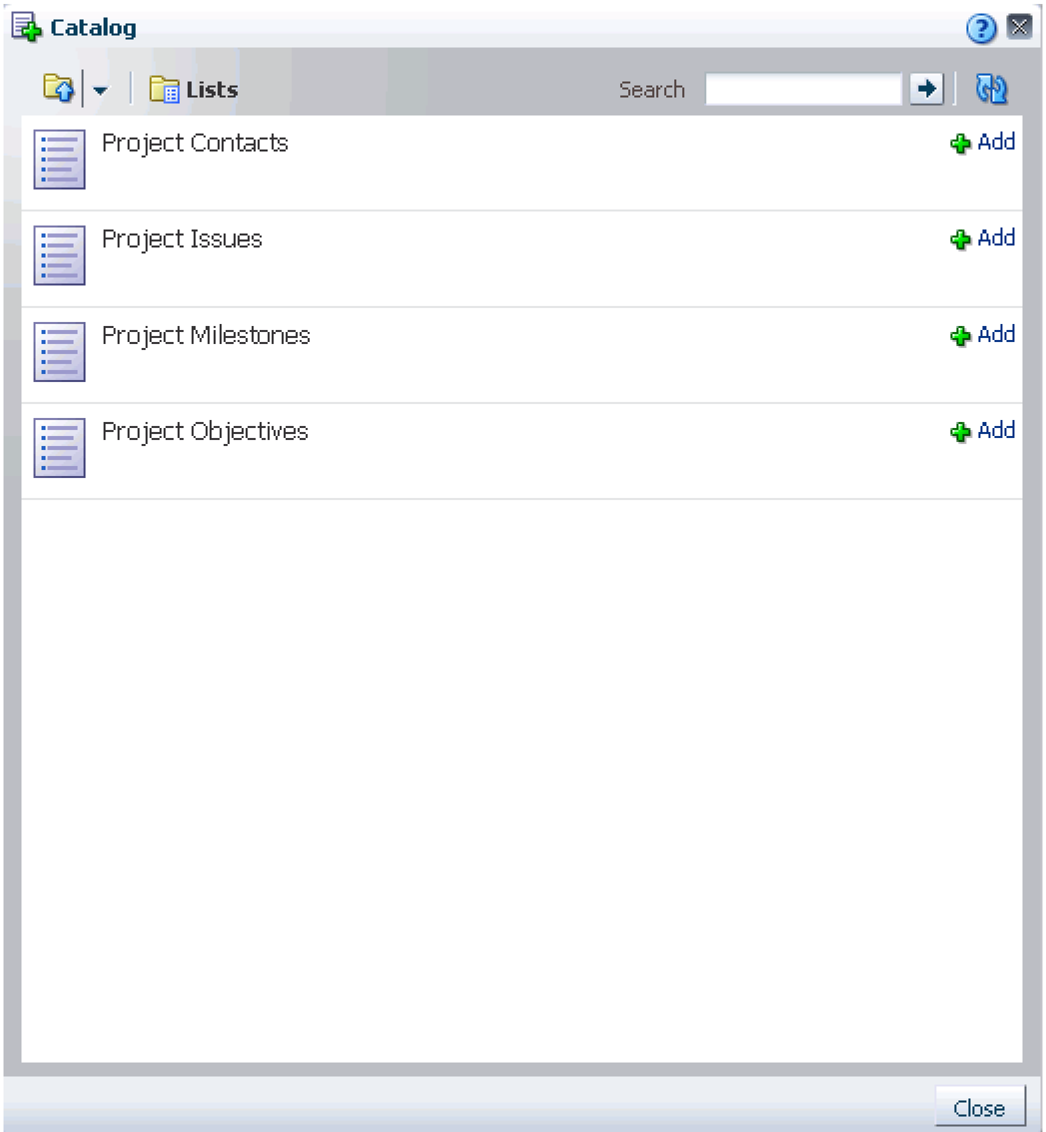
- Individual group space lists are located under *Lists* in the **Lists** folder in the Oracle Composer Catalog (Figure 22–6).

Figure 22–6 Lists Under the Lists Folder in the Oracle Composer Catalog



Click the **Open** link next to *Lists* to view and select individual group space lists (Figure 22–7).

Figure 22–7 Individual Group Space Lists



Click the **Add** link next to a list to add it to the current page (for more information, see Section 10.1.4, "Adding Task Flows to a Page"). The list is rendered within a List Viewer task flow.

Through its tight integration with the Links service, the Lists service provides the opportunity to associate other WebCenter Spaces items with an entire list or an individual list row. Linking enables you to associate documents, notes, and URLs with a list or a list row. For more information, see Chapter 21, "Working with the Links Service."

The Lists service additionally provides RSS feeds for all lists and for individual lists. For information about the Lists service and RSS, see Chapter 26, "Working with the RSS Service."

22.2 Working with Lists Service Task Flows

This section provides information about using the features available through the List Viewer and List Manager task flows. It contains the following subsections:

- Section 22.2.1, "Adding Lists Service Task Flows to a Page"
- Section 22.2.2, "Viewing Lists"
- Section 22.2.3, "Creating and Managing Lists"
- Section 22.2.4, "Adding and Managing List Data"
- Section 22.2.5, "Personalizing and Customizing Lists"
- Section 22.2.6, "Sending a Link to a List to Other Users"
- Section 22.2.7, "Exporting a List to a Spreadsheet and Importing an Exported List"

22.2.1 Adding Lists Service Task Flows to a Page

For the steps to add a Lists service task flow to a page, see Section 10.1.4, "Adding Task Flows to a Page."

22.2.2 Viewing Lists

You can view all of the lists associated with group spaces to which you have access. You can view the lists associated with a group space on its **Lists** page. Additionally, you can view all of a group space's lists in the List Manager task flow. The List Viewer task flow displays an individual list.

> **See Also:** For illustrations of Lists service task flows, see Section 22.1, "What You Should Know About the Lists Service."

This section describes how to view lists on the **Lists** page.

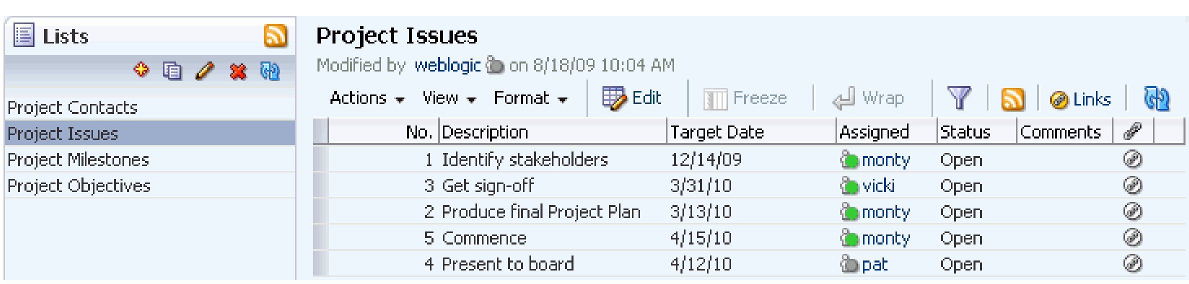
To view a list on the **Lists** page:

1. Log in, and go to the group space that contains the list you want to view.
2. Click the **Lists** tab to bring the **Lists** page forward.

   If the **Lists** tab is not available, see Section 2.5, "Hiding, Showing, Opening, and Closing Pages."

   Alternatively, go to a group space page that contains a List Manager task flow that displays the list you want to revise.
3. From the **Lists** panel, select the list you want to view (Figure 22–8).

Figure 22–8 Selecting the Project Issues List in the List Manager



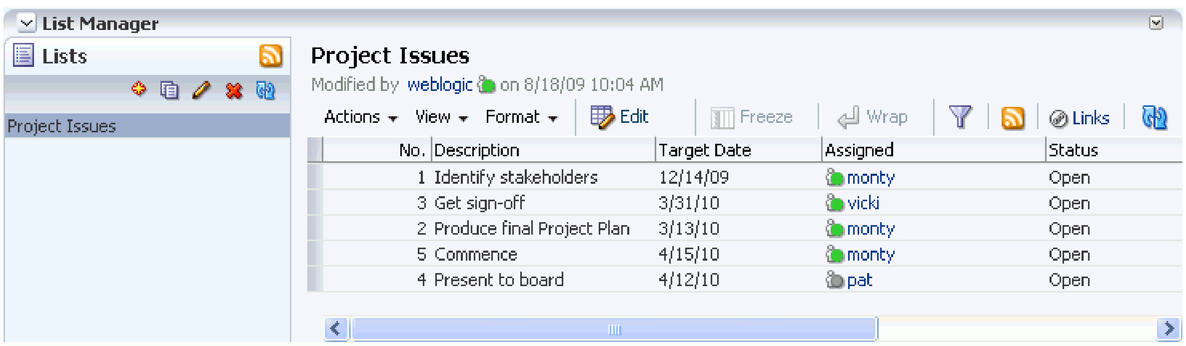
List details appear to the right.

> **Tip:** The **Lists** panel comes with a **Refresh** icon, which you can click to refresh the display of lists.

22.2.3 Creating and Managing Lists

The List Manager is a list creation environment that provides all the tools required to create meaningful lists (Figure 22–9).

Figure 22–9 The List Manager Task Flow



This section describes how to create, edit, copy, and delete lists in the List Manager. It includes the following subsections:

- Section 22.2.3.1, "Creating a List"
- Section 22.2.3.2, "Editing List Structure"
- Section 22.2.3.3, "Copying a List"
- Section 22.2.3.4, "Deleting Lists"

22.2.3.1 Creating a List

Create lists rapidly with a list template, or create a custom list from the beginning. List templates provide preset columns, which you can use "as-is" or as a starting point for developing a custom list.

Additionally, you can create custom lists (**Custom List**) that have the number of columns you choose (up to 30) with whatever column titles you provide.

Note: If you plan to create lists, your assigned application role must include *Create* permission. If you plan to view lists, your role must include *View* permission. Out of the box, the roles *Participant* and *Moderator* have these permissions.

See Also: For information about WebCenter Spaces seeded user roles, see the "Default Policy Store Permissions for WebCenter Spaces" section of the *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter*.

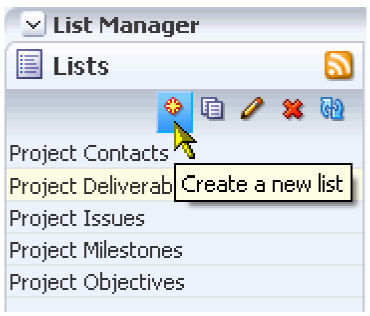
To create a list:

1. Go to the **Lists** page of the group space where you want to create a list.

   For information about navigating to a **Lists** page, see Section 22.2.2, "Viewing Lists."

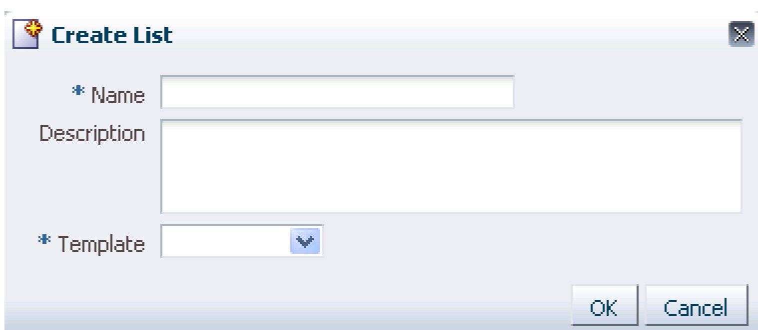
2. In the **Lists** toolbar, click the **Create a new list** icon (Figure 22–10).

Figure 22–10 The Create a New List Icon



3. In the resulting Create List dialog (Figure 22–11), enter a name for the list in the **Name** field.

Figure 22–11 Create List Dialog

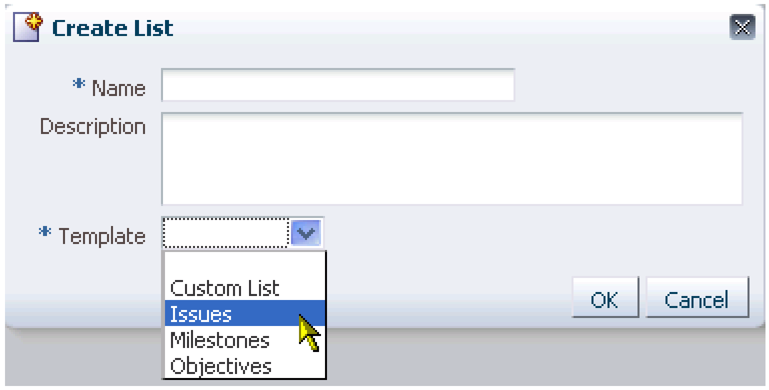


4. Optionally, in the **Description** field enter a description of the list.

   In a completed list, the description appears between the list title and list data.

5. From the **Template** menu (Figure 22–12), select a template or select **Custom List** to omit using a template.

Figure 22–12 Template Menu



Choose from:

- **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 **Subject**, **Assigned To**, **Closed**, **Comments**, and **Links**.
- **Milestones**—To create a list of, for example, project milestones. By default, this template provides the columns **Date**, **Description**, **Status**, and **Links**.
- **Objectives**—To create a list of, for example, project objectives. By default, this template provides the columns **Title**, **Description**, and **Links**.

6. Click **OK**.

   The new list appears in the List Manager column of lists.

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 22.2.3.2, "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 list data (that is, new list rows), see Section 22.2.4, "Adding and Managing List Data."

22.2.3.2 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 redescribe the list.

This section describes the various tasks you can perform while editing a list structure. It contains the following subsections:

- Section 22.2.3.2.1, "Renaming a List and Revising a List Description"
- Section 22.2.3.2.2, "Adding Columns to a List"
- Section 22.2.3.2.3, "Revising List Column Details"
- Section 22.2.3.2.4, "Rearranging List Columns on All Instances of a List"
- Section 22.2.3.2.5, "Deleting a List Column"

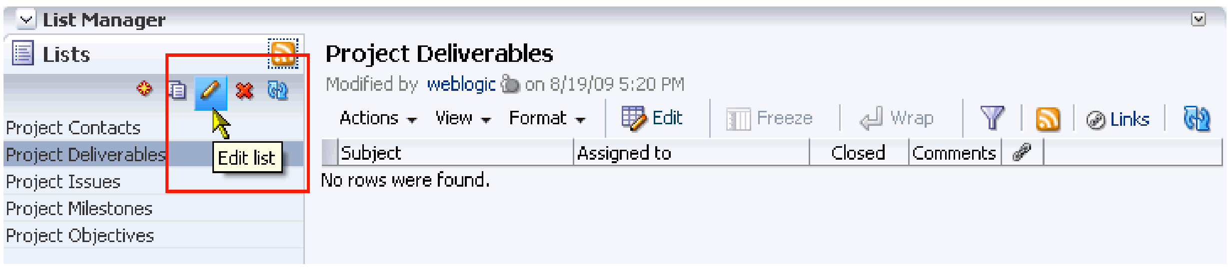
22.2.3.2.1 Renaming a List and Revising a List Description To rename a list and revise a list description:

1. Go to the **Lists** page of the group space where you want to rename a list or revise a list description.

   For information about navigating to the **List** page, see Section 22.2.2, "Viewing Lists."

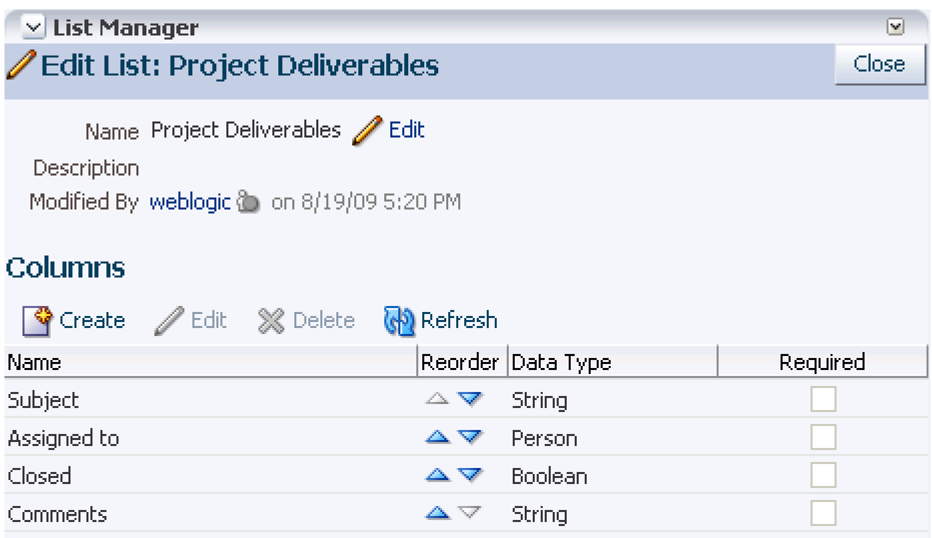
2. In the **Lists** panel, select the list you want to change and click the **Edit list** icon (Figure 22–13).

Figure 22–13 The Edit List Icon



The List Manager enters edit list mode (Figure 22–14).

Figure 22–14 The List Manager in Edit List Mode



3. Click the **Edit** link to the right of the **Name** field.

   The Edit List dialog opens (Figure 22–15).

Figure 22–15 Edit List Dialog

4. Revise the list name and description.
5. Click **OK** to close the dialog and save your changes.
6. Click the **Close** button in edit list mode to return to the List Manager default mode.

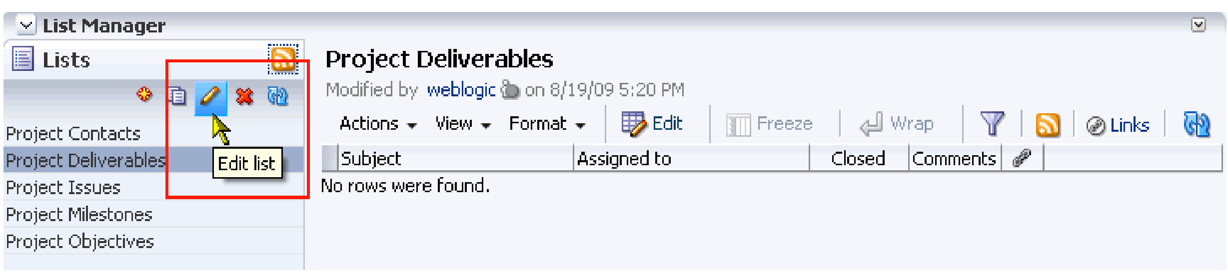
22.2.3.2.2 Adding Columns to a List This procedure is useful when you create a custom list or you want to alter a default list structure. This section describes how to add columns to lists. A list supports up to 30 columns.

To add columns to a list:

1. Go to the **Lists** page of the group space where you want to add columns to a list.

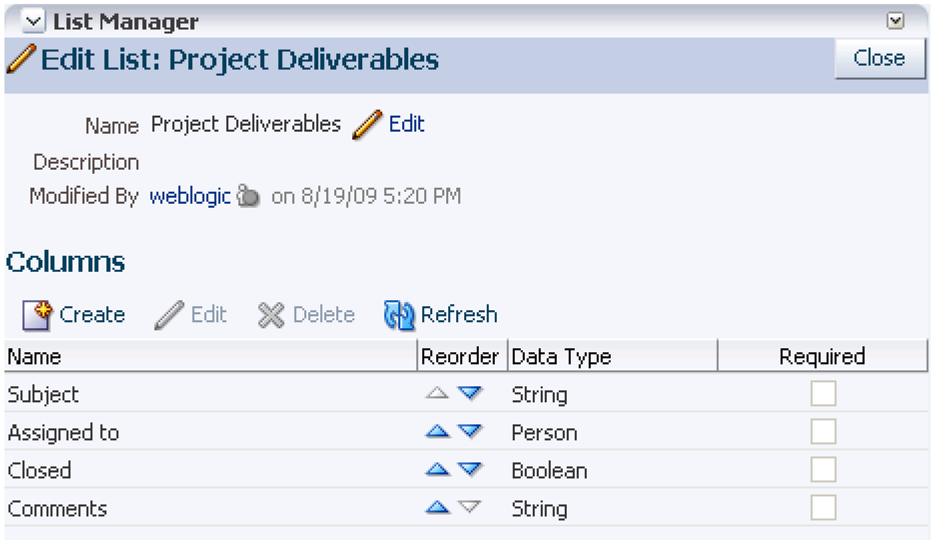
   For information about navigating to a **Lists** page, see Section 22.2.2, "Viewing Lists."
2. In the **Lists** panel, select the list to which to add columns and click the **Edit list** icon (Figure 22–16).

Figure 22–16 The Edit List Icon



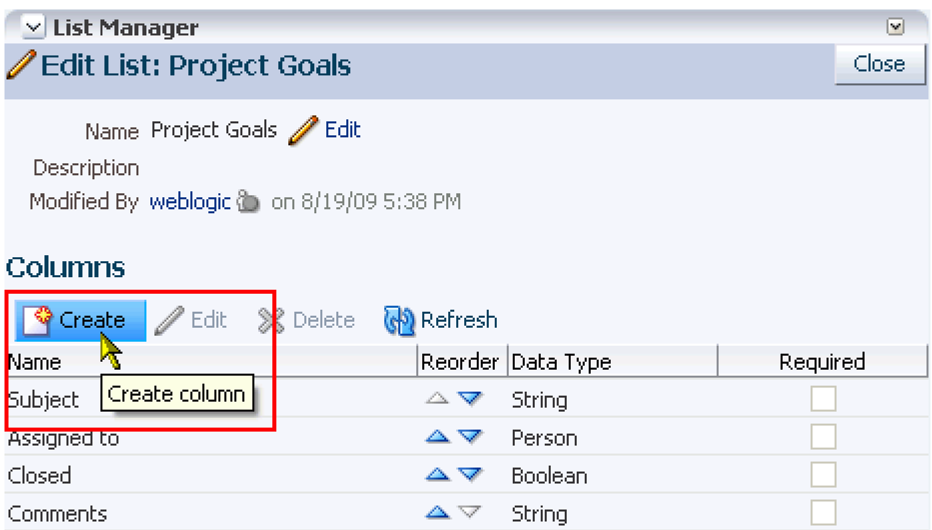
The List Manager enters edit list mode (Figure 22–17).

Figure 22–17 The List Manager in Edit List Mode



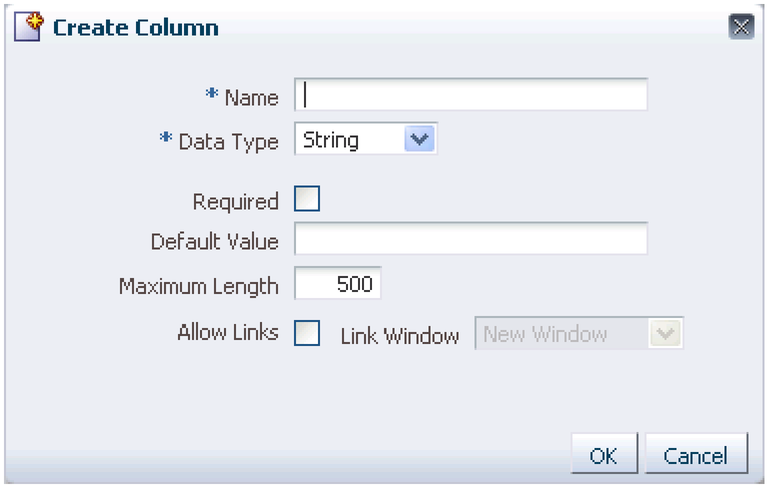
3. Under **Columns**, click the **Create** button (Figure 22–18).

Figure 22–18 Create Button in Edit List Mode



The Create Column dialog opens (Figure 22–19).

Figure 22–19 Create Column Dialog



4. In the **Name** field, provide a name for this column.
5. From the **Data Type** dropdown list, select the type of data you want to enter in this column.

   The data type you select affects which column detail fields appear in the dialog (see Table 22–1 and Table 22–2). It also affects the type of validation that is run on column data when you and other authorized users add list rows. For example, if you select a `Date` data type, and a user enters text that is not in the `Date` format, WebCenter Spaces returns an error.

   Table 22–1 lists and describes the data types available to list columns, and provides the additional details that appear for each type.

Table 22–1 Data Type Selections for List Columns

Data Type	Description	Comments
String	Requires column entries to be text strings	Additional column details include (for descriptions of additional column details, see Table 22–2): ■ Required ■ Default Value ■ Maximum Length ■ Allow Links ■ Link Window
Number	Requires column entries to be numbers	Additional column details include (for descriptions of additional column details, see Table 22–2): ■ Required ■ Format ■ Default Value ■ Minimum Value ■ Maximum Value For Format, select from: ■ Number—an unformatted number; decimal separator is based on the currently selected locale. For more information, see Section 3.1, "Choosing 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 3.1, "Choosing Your Preferred Display Language." ■ Percent—value is formatted as a percentage; the value *0.6* is formatted as `0.6%`; the value *60* is formatted as `60%`. The Number data type supports numbers from ±1.79769313486231570e+308 with 14 to 15 significant digits.[1]

Table 22–1 (Cont.) Data Type Selections for List Columns

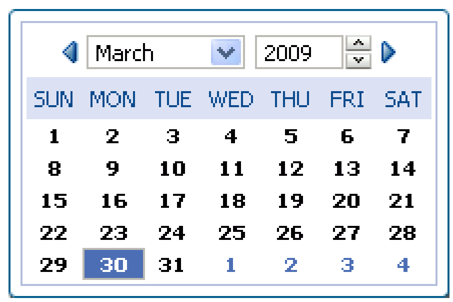
<table>
<tr><th>Data Type</th><th>Description</th><th>Comments</th></tr>
<tr><td>DateTime</td><td>Requires column entries to be dates in the format specified in a given user's WebCenter Spaces preferences</td><td>
Additional column details include (for descriptions of additional column details, see Table 22–2):

- Required
- Format
- Default Value

For Format, select from:

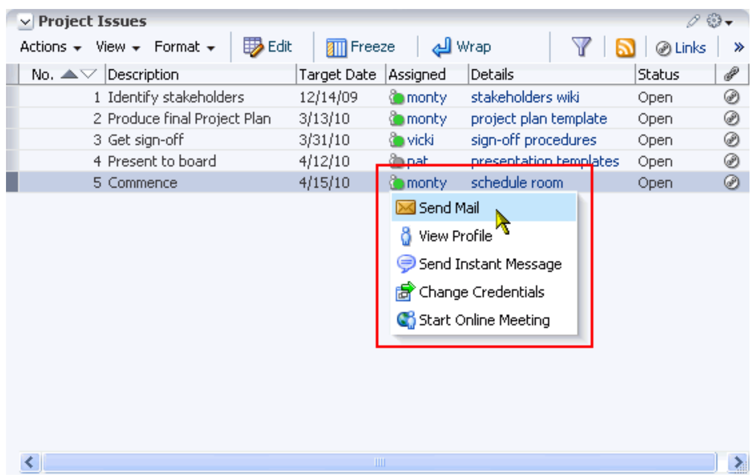
- Date—For requiring a date.
- Time—For requiring a time.
- Date and Time—For requiring a date and a time.

The **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, March 30th in the following figure.



This field does not require leading zeroes, for example, it does not require `05/04/2009`. Instead, you can use `5/4/2009`.
</td></tr>
</table>

Table 22–1 (Cont.) Data Type Selections for List Columns

Data Type	Description	Comments
Boolean	Requires column entries to be either `TRUE` or `FALSE`.	Additional column details include (for descriptions of additional column details, see Table 22–2): ■ Default Value `TRUE` or `FALSE` is rendered as a checkbox. Checked equals `TRUE`; cleared equals `FALSE`.
Person	Requires column entries to be valid user names	Additional column details include (for descriptions of additional column details, see Table 22–2): ■ Required ■ Default Value The Default Value field includes a **Find user** icon, which you can use to locate and select a default user. Click the **Find user** icon, and in the resulting dialog, enter—minimally—two consecutive characters from the name of your search target (the search term `do` finds both `condoleeza` and `doug`). Click the **Search** button, and all names in your company LDAP directory that match your search criteria appear in the results area. To populate the **Default User** field with your selection, select a user and click **OK**. 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 20.2.1, "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.

6. After you select a data type, enter values for the remaining fields.

   Table 22–2 lists the possible remaining fields and their associated data types.

Table 22–2 Column Details That May Follow the Data Type Detail

Column Detail	Description	Associated Data Type(s)
Required	Select this checkbox to require that data is entered in this column.	String, Number, DateTime, Person
Format	Use this pick list to specify the format for column values. For more information, see Table 22–1.	Number, DateTime
Default Value	Optionally, provide a default value for the column entry.	All data types
Maximum Length	Enter the maximum number of characters for this column entry. This includes character spaces.	String
Minimum Value	Indicate the lowest number that can be entered in this column.	Number
Maximum Value	Indicate the highest number that can be entered in this column.	Number
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.	String
Link Window	Indicate how a hyperlink on column data should open. Choose from: ▪ New Window—The link opens in a new browser tab or window. ▪ Current Window—The link opens in the current browser window.	String

7. Click **OK** to save your changes and exit the dialog.
8. Click **Close** to exit List Edit mode.

22.2.3.2.3 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 `String` 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 `String` data type, all values are retained.

> **Note:** Validation occurs only on data entry. If a user changes column details after data has been entered into the column, the existing data is not affected (that is, validated) even if it does not meet the new column detail conditions on the columns.
>
> If you want to validate new list data, you can export the list data to an Excel spreadsheet and then import it. On import, all rows are validated. The rows that fail validation are noted. You can fix invalid rows in the spreadsheet and import again.

See Also: For more information, see Section 22.2.7, "Exporting a List to a Spreadsheet and Importing an Exported List."

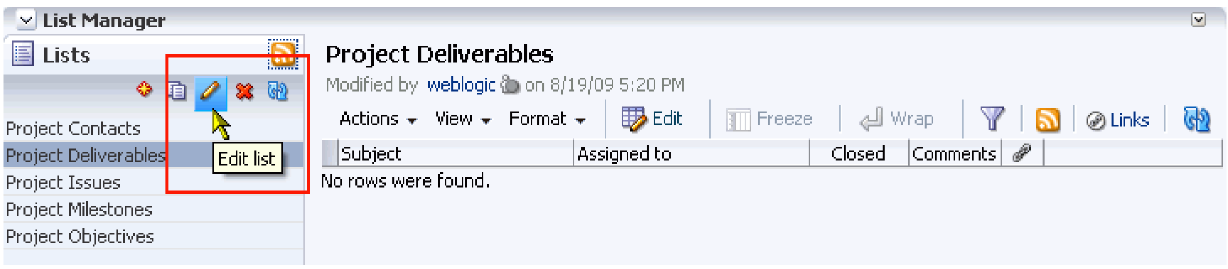
To revise list column details:

1. Go to the **Lists** page of the group space where you want to revise list column details.

   For information about navigating to a **Lists** page, see Section 22.2.2, "Viewing Lists."

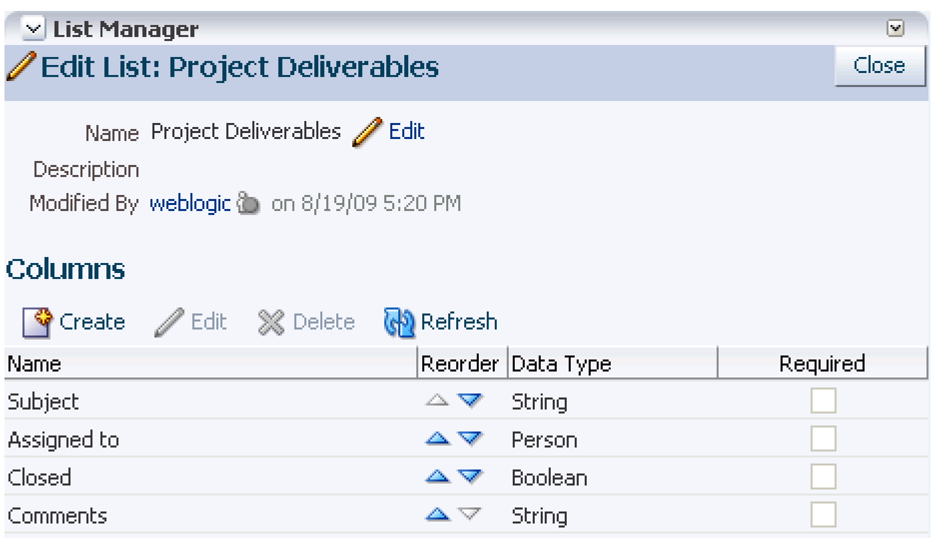
2. In the **Lists** panel, select the list you want to change and click the **Edit list** icon (Figure 22–20).

Figure 22–20 The Edit List Icon



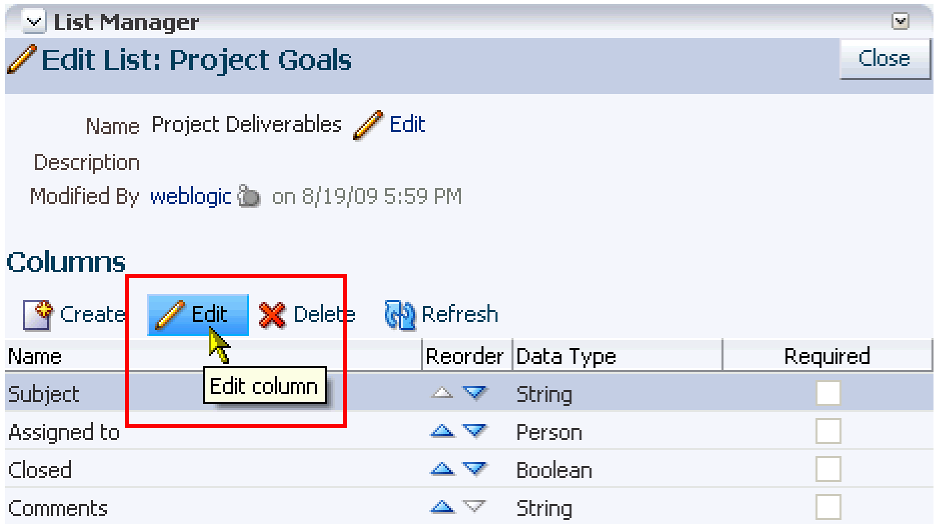
The List Manager enters edit list mode (Figure 22–21).

Figure 22–21 The List Manager in Edit List Mode



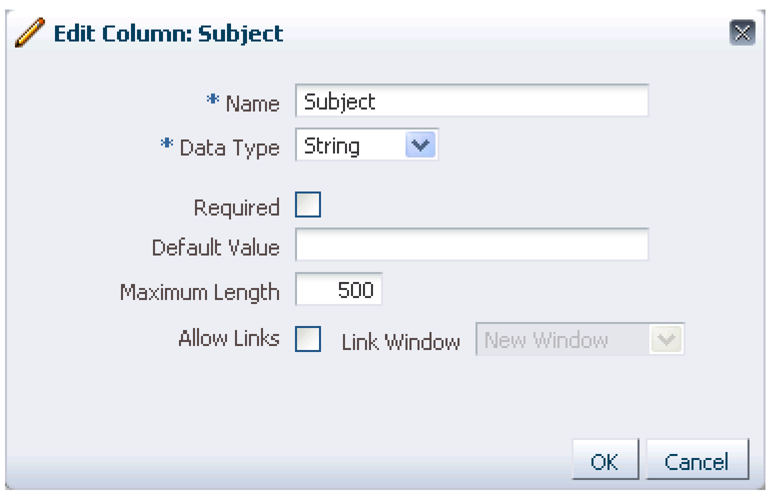
3. Under **Columns**, select the list column you want to revise and click the **Edit** button (Figure 22–22).

Figure 22–22 Edit Button in Edit List Mode



The Edit Column dialog opens (Figure 22–23).

Figure 22–23 Edit Column Dialog



4. Edit column details as you prefer.

   For information about column details, see Section 22.2.3.2.2, "Adding Columns to a List."

5. Click **OK** to save your changes and close the dialog.

6. Click the **Close** button to exit edit list mode.

22.2.3.2.4 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. This section describes how.

> **See Also:** For information about rearranging column order of a particular list instance in your view or everyone's view, see Section 22.2.5.3, "Changing Column Order on a List Instance."

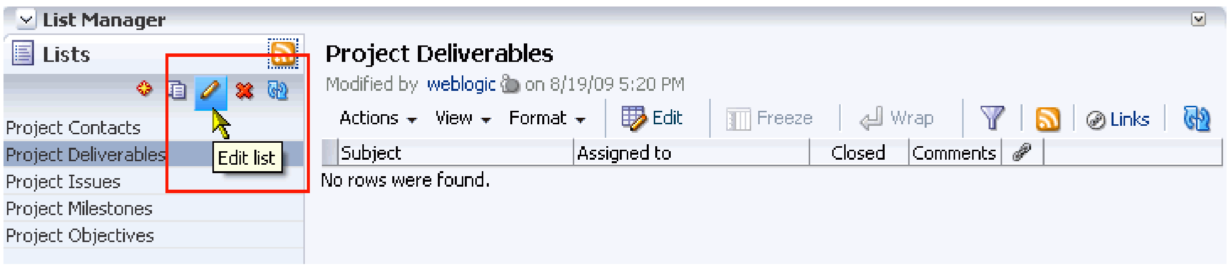
To rearrange columns on all instances of a list:

1. Go to the **Lists** page of the group space where you want to rearrange list columns.

   For information about navigating to a **Lists** page, see Section 22.2.2, "Viewing Lists."

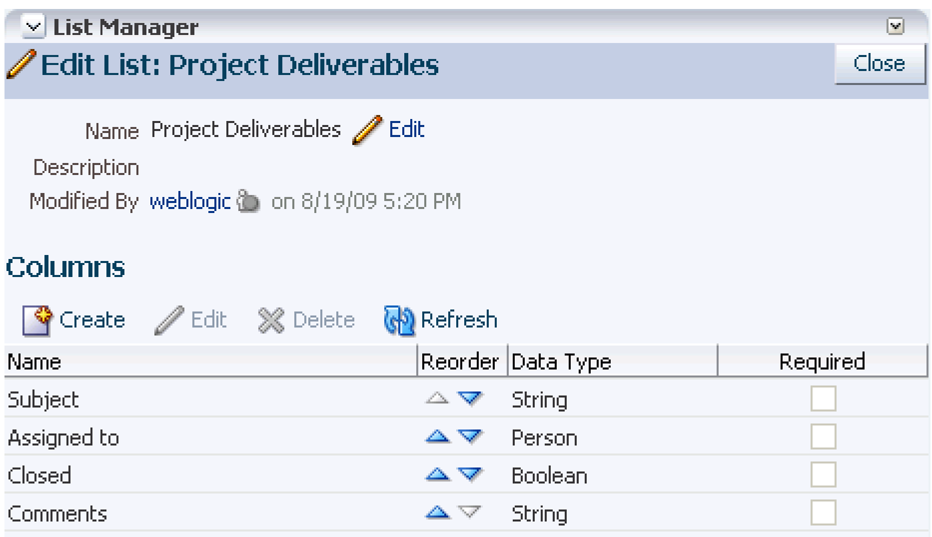
2. In the **Lists** panel, select the list you want to change and click the **Edit list** icon (Figure 22–24).

Figure 22–24 The Edit List Icon



The List Manager enters edit list mode (Figure 22–25).

Figure 22–25 The List Manager in Edit List Mode



3. Under **Columns**, click an icon under the **Reorder** column to move a column higher or lower in the order of columns.

   Moving a column higher causes it to appear further to the left in column display order. Moving a column lower causes it to render further to the right.

   Alternatively, drag and drop a column higher or lower in the column hierarchy.

4. Click the **Close** button to exit edit list mode.

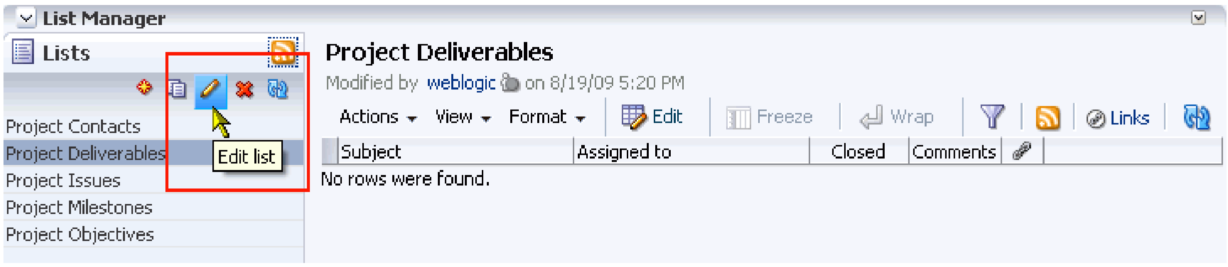
22.2.3.2.5 Deleting a List Column To delete a list column:

1. Go to the **Lists** page of the group space where you want to delete list columns.

For information about navigating to a **Lists** page, see Section 22.2.2, "Viewing Lists."

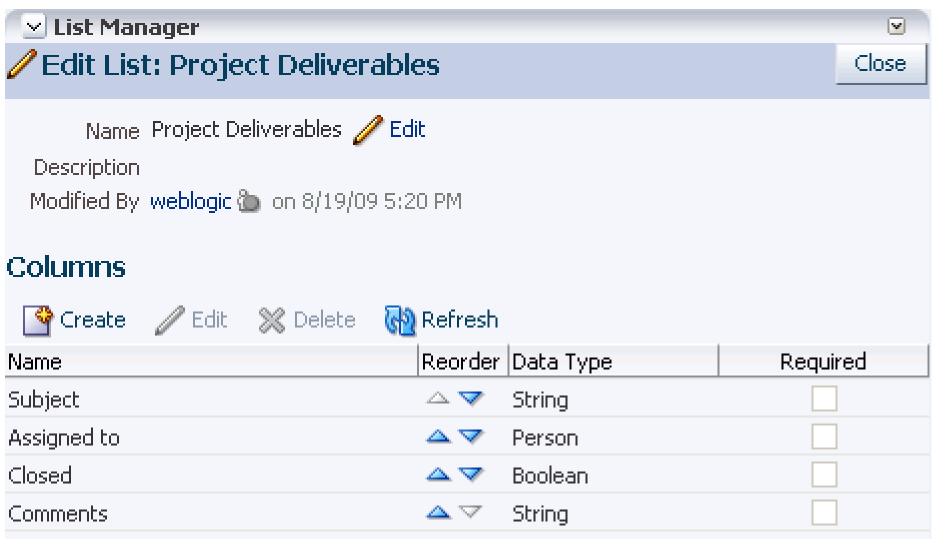
2. In the **Lists** panel, select the list you want to change and click the **Edit list** icon (Figure 22–26).

Figure 22–26 The Edit List Icon



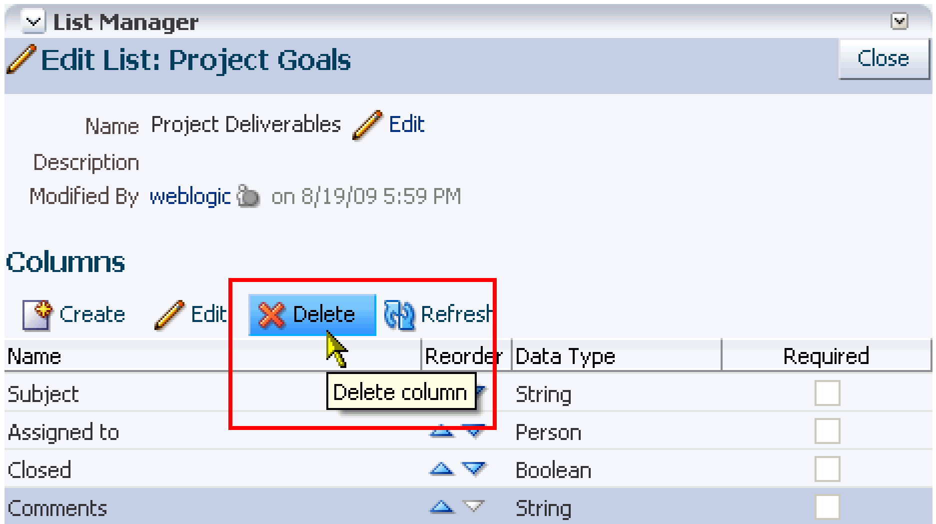
The List Manager enters edit list mode (Figure 22–27).

Figure 22–27 The List Manager in Edit List Mode



3. Select a list row, and click the **Delete** button (Figure 22–28).

Figure 22–28 Delete Button



4. In the resulting confirmation dialog, click the **Delete** button to complete the deletion.

22.2.3.3 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 as you like.

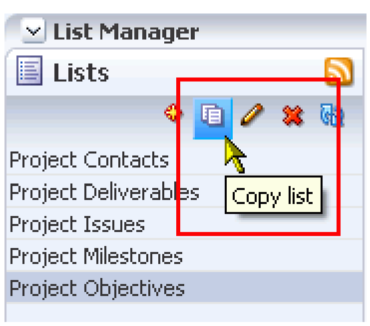
To copy a list:

1. Go to the **Lists** page of the group space that contains the list you want to copy.

   For information about navigating to a **Lists** page, see Section 22.2.2, "Viewing Lists."

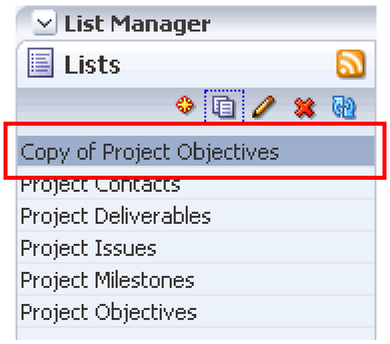
2. In the **Lists** panel, select the list you want to copy.
3. Click the **Copy List** icon (Figure 22–29).

Figure 22–29 The Copy List Icon



A copy of the list becomes available for selection in the **Lists** panel (Figure 22–30).

Figure 22–30 A Copy of a List



See Also: For information about changing the list name or description, see Section 22.2.3.2.1, "Renaming a List and Revising a List Description." For information about revising list structure, see Section 22.2.3.2, "Editing List Structure."

22.2.3.4 Deleting Lists

To delete a list:

1. Go to the **Lists** page of the group space that contains the list you want to delete.

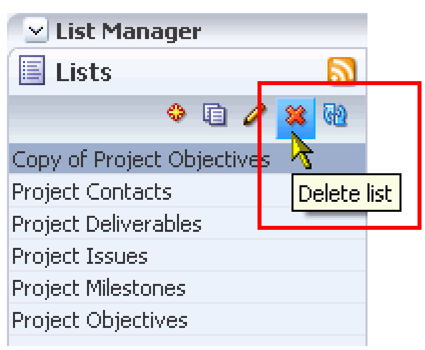
   For information about navigating to a **Lists** page, see Section 22.2.2, "Viewing Lists."

2. In the **Lists** panel, select the list you want to delete.

   To select multiple lists, use Ctrl-click; to select a range of lists, use Shift-click.

3. Click the **Delete List** icon (Figure 22–31).

Figure 22–31 The Delete List Icon



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

   After confirmation, the selected lists are removed from the **Lists** panel.

22.2.4 Adding and Managing List Data

Once you have created a list structure, you 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 subsections:

- Section 22.2.4.1, "Adding Data to a List"

- Section 22.2.4.2, "Editing List Data"
- Section 22.2.4.3, "Creating Hyperlinks on List Data"
- Section 22.2.4.4, "Refreshing List Data"
- Section 22.2.4.5, "Deleting List Rows"

See Also: For information about list structure, see Section 22.2.3, "Creating and Managing Lists." For information about list data types, see Table 22–1, " Data Type Selections for List Columns" and Table 22–2, " Column Details That May Follow the Data Type Detail".

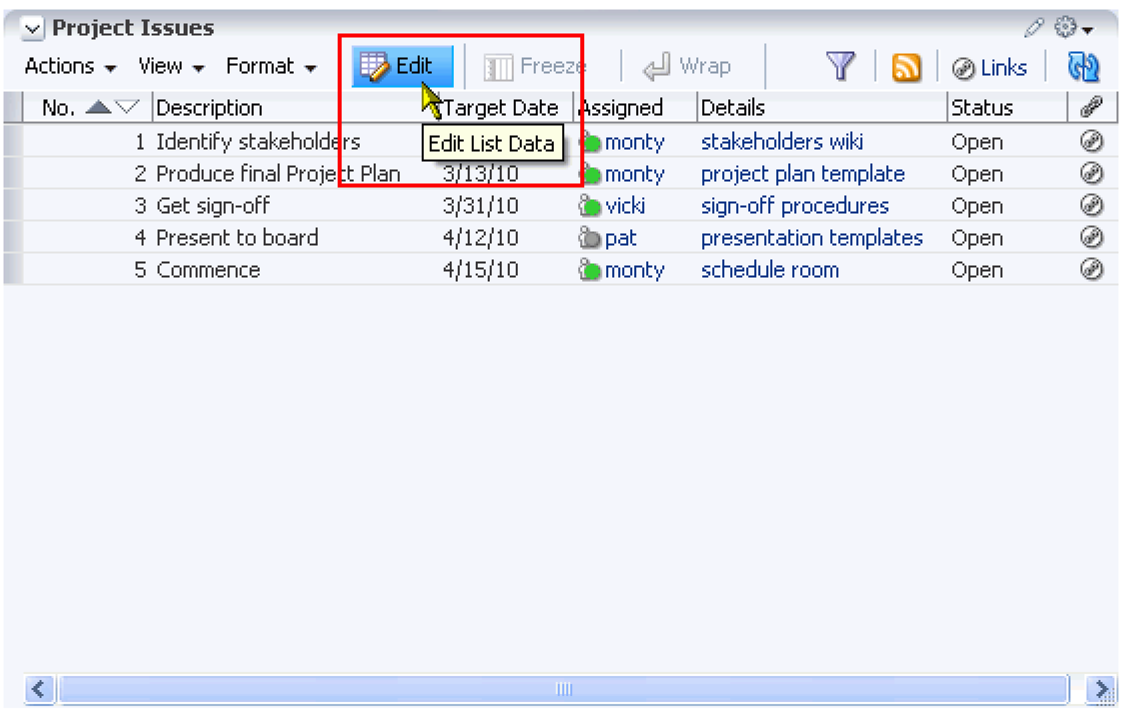
22.2.4.1 Adding Data to a List

This section describes how to add data to a list. When you add list data as a new row, the new row is created after the selected row. If no row is selected, the new row is created as the first row. When you save your changes, the list data is refreshed and the rows are displayed in sort order (for more information, see Section 22.2.5.1, "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.

To add data to a list:

1. Go to the List Viewer task flow that displays the list you want to populate with data, and click the **Edit List Data** icon to open the list in edit mode (Figure 22–32).

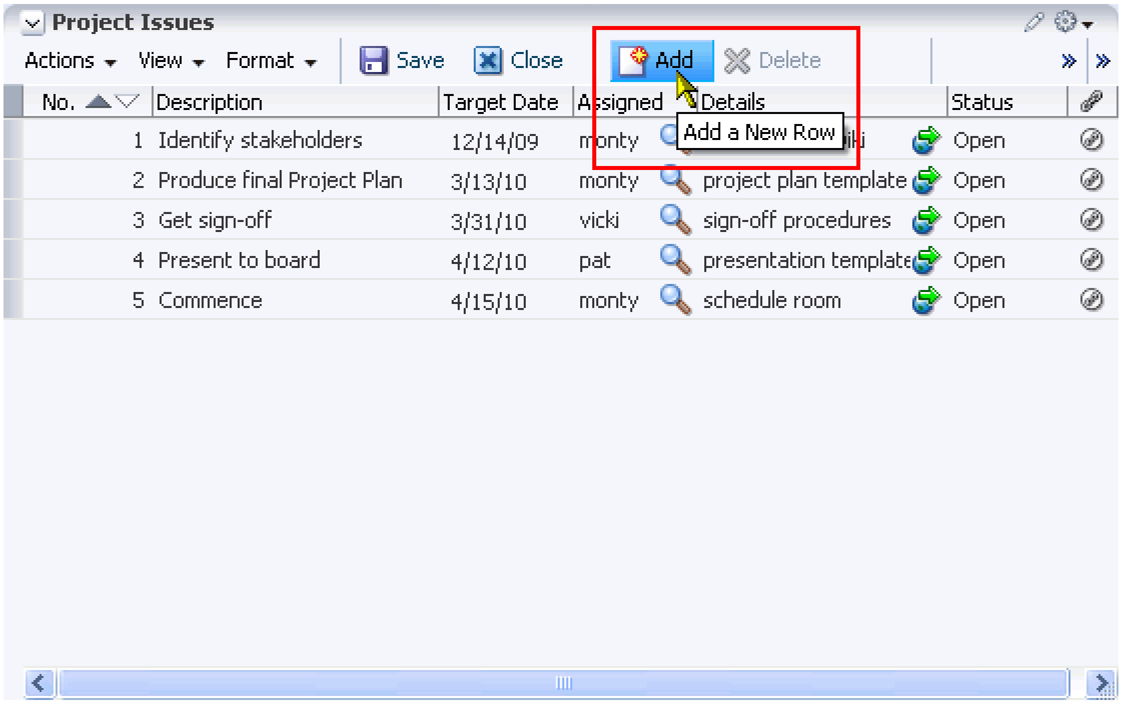
Figure 22–32 Edit List Data Icon on a List



Tip: You can also enter list edit mode by selecting **Edit** from the **Actions** menu or by pressing Crtl+E.

2. Click the **Add a New Row** icon to add a row to the list (Figure 22–33).

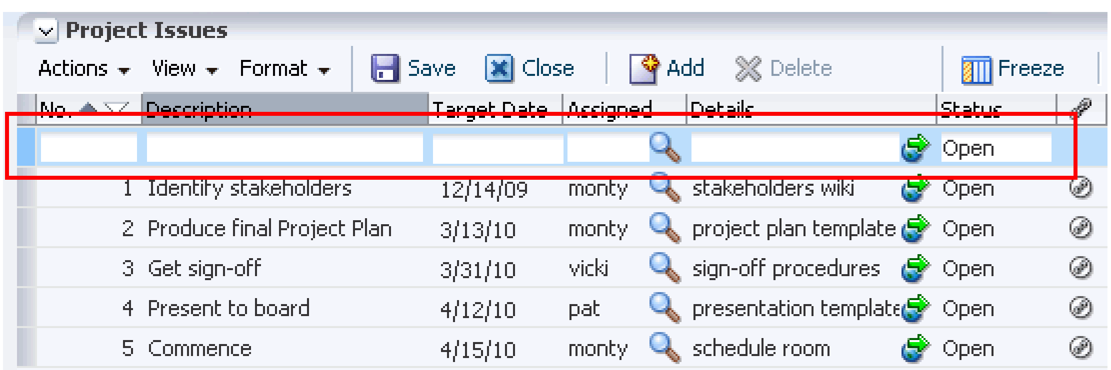
Figure 22–33 Add a New Row Icon



> **Tip:** You can also start the add-row process by selecting **Add Row** from the **Actions** menu 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 22–34).

Figure 22–34 A Newly Added Row



3. Add data to the new row.
4. For each new row, click **Add a New Row** and add data.
5. When you finish adding rows and data, click **Save** to save your changes and exit list edit mode.

   If you click **Close**, instead, the Lists service checks for unsaved changes and prompts you to save or discard the changes.

> **Tip:** To save, you can also select **Save** from the **Actions** menu, or press Ctrl+M. To close, you can also select **Close** from the **Actions** menu, or press Ctrl+Q.

When you save your changes, the list data is refreshed and the rows are displayed in sort order (for more information, see Section 22.2.5.1, "Sorting List Data on a Column").

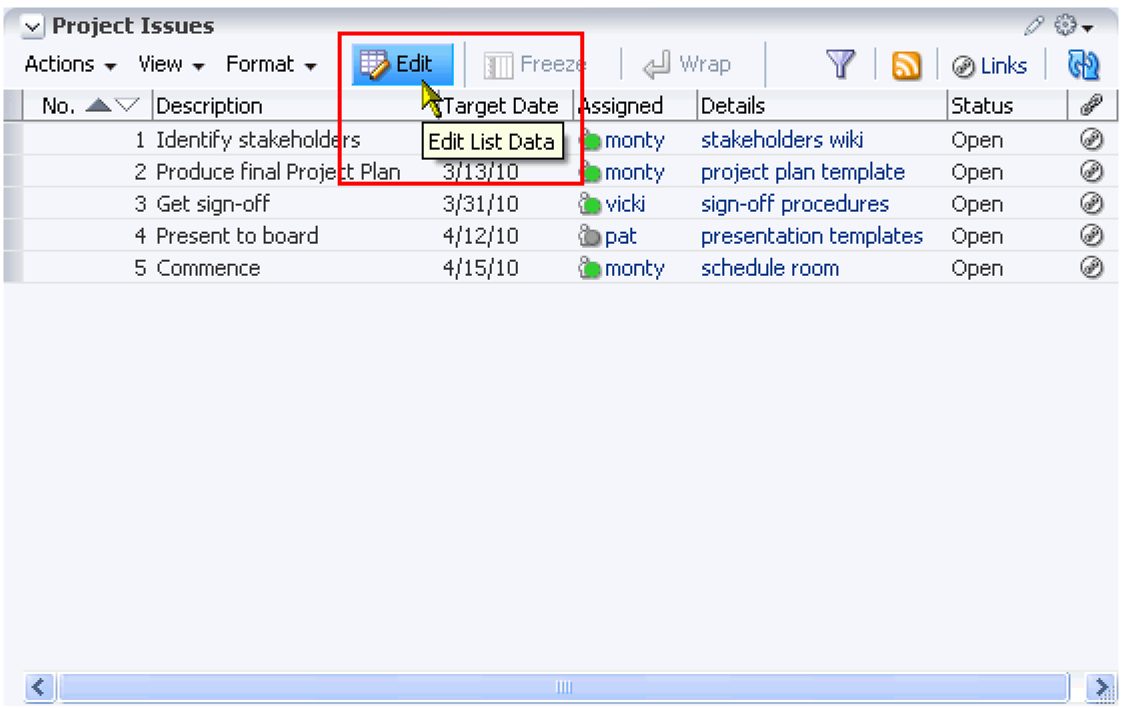
22.2.4.2 Editing List Data

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:

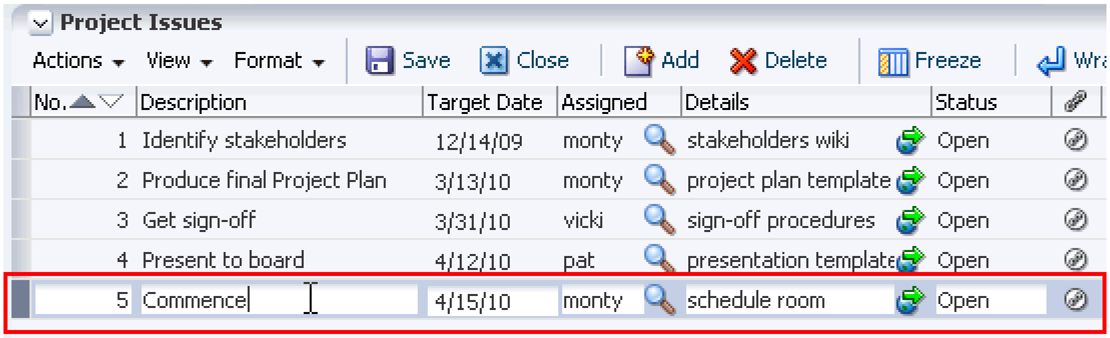
1. Go to the list that contains data you want to edit, and click the **Edit list data** icon to open the list in edit mode (Figure 22–35).

Figure 22–35 Edit List Data Icon on a List



2. Click a list row to revise its data (Figure 22–36).

Figure 22–36 A List Row in Edit Mode



3. Continue clicking rows and revising data until you are finished.
4. Click **Save** to save your changes and exit edit list mode.

   If you click **Close**, instead, the Lists service checks for unsaved changes and prompts you to save or discard the changes.

   > **Tip:** To save, you can also select **Save** from the **Actions** menu, or press Ctrl+M. To close, you can also select **Close** from the **Actions** menu, or press Ctrl+Q.

22.2.4.3 Creating Hyperlinks on List Data

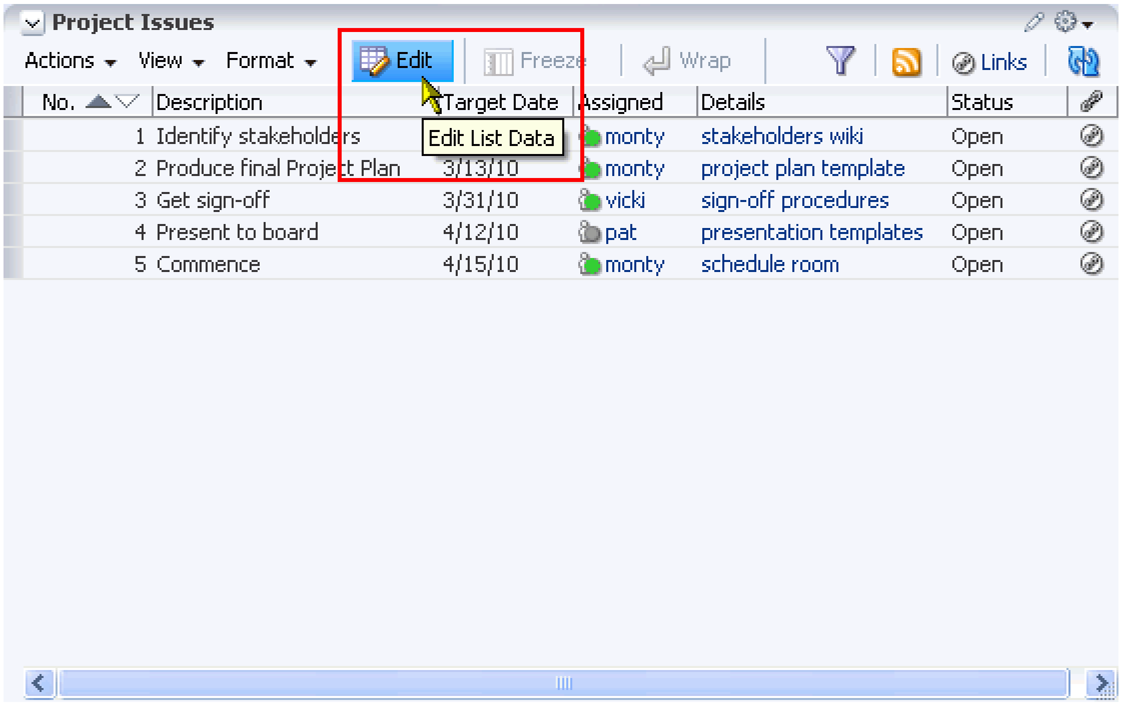
Use the hyperlink feature to add link targets to list data. Unlike the Links service, which is accessed through the **Links** icon, the Lists service hyperlink feature provides a means of creating link directly on list data.

To create a hyperlink on list data, the list column must be of the type `String` and must be configured to allow for the creation of hyperlinks (for more information, see Section 22.2.3.2.2, "Adding Columns to a List").

To create hyperlinks on list data:

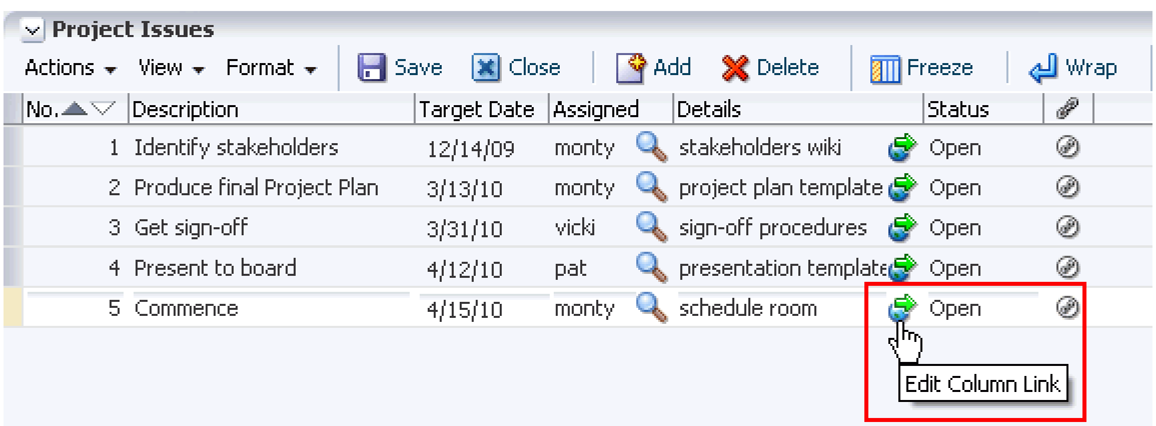
1. Go to the list on which to create hyperlinks.
2. Click the **Edit List Data** icon to open the list in edit mode (Figure 22–37).

Figure 22–37 Edit List Data Icon on a List



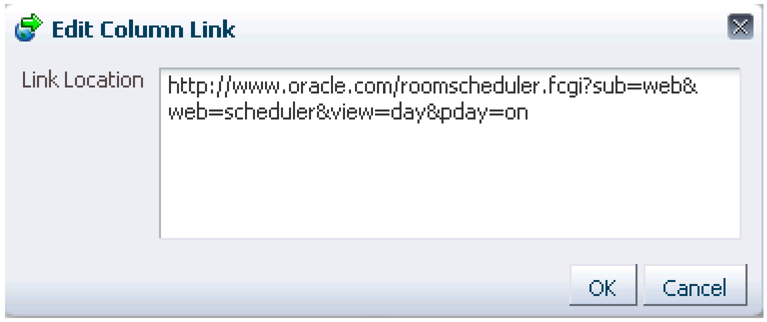
3. Click the **Edit Column Link** icon next to the relevant data (Figure 22–38).

Figure 22–38 Edit Column Link Icon



4. In the resulting Edit Column Link dialog, enter the target URL (Figure 22–39).

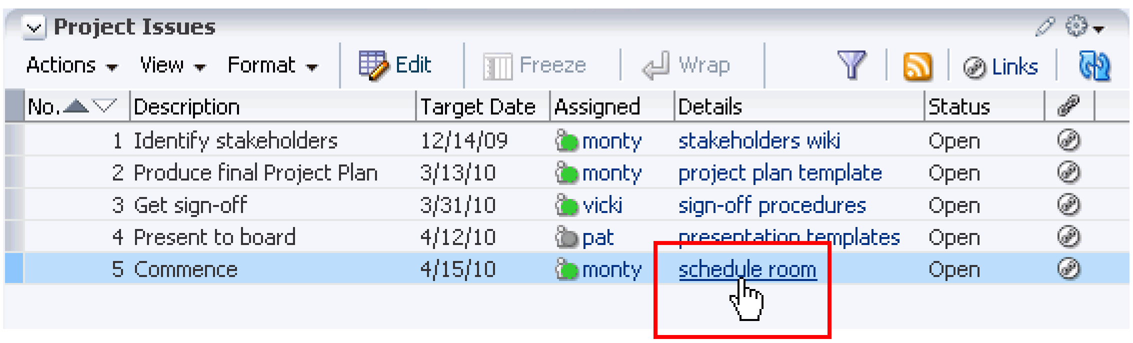
Figure 22–39 Edit Column Link Dialog



5. Click **OK**.
6. Click **Save** to save your changes and exit edit list mode.

   The affected list data now behaves as linked text (Figure 22–40).

Figure 22–40 Hyperlinked Text



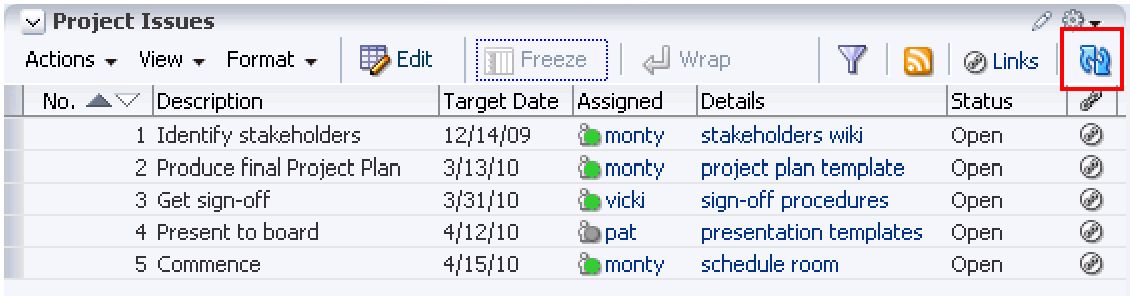
If you click **Close**, instead, the Lists service checks for unsaved changes and prompts you to save or discard the changes.

> **Tip:** To save, you can also select **Save** from the **Actions** menu, or press Ctrl+M. To close, you can also select **Close** from the **Actions** menu, or press Ctrl+Q.

22.2.4.4 Refreshing List Data

All lists come with a **Refresh** icon, which you can click to refresh the display of list data.

Figure 22–41 Refresh Icon on a List



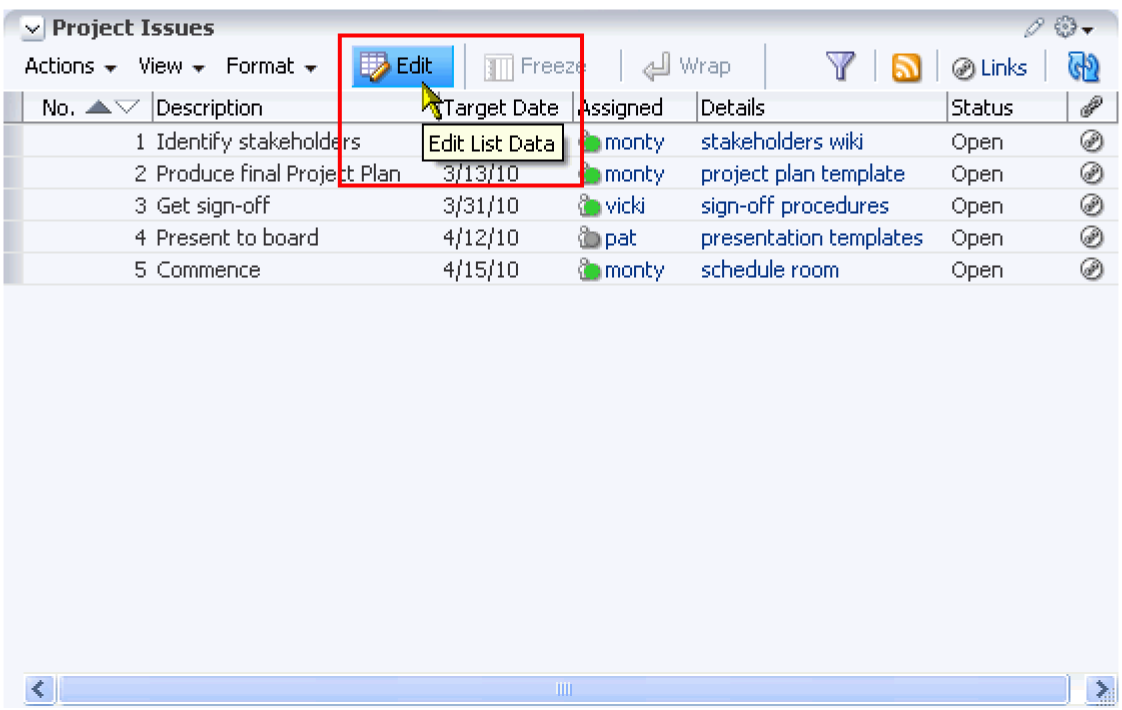
22.2.4.5 Deleting List Rows

You can delete one or multiple list rows in one operation. Note that, 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 repository. The actual delete takes place when you save the change.

To delete one or multiple list rows:

1. Go to the list with rows to delete.
2. Click the **Edit List Data** icon to open the list in edit mode (Figure 22–42).

Figure 22–42 Edit List Data Icon on a List

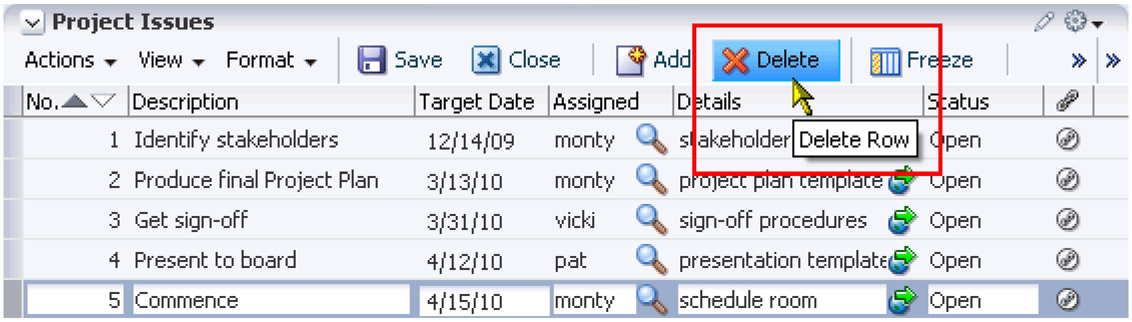


3. Select one or more rows to delete.

   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 the **Delete** button above the list (Figure 22–43).

Figure 22–43 The Delete (List Row) Button



The selected rows are marked for deletion removed from your view of the list.

5. Click **Save** to save your changes and exit edit list mode.

   If you click **Close**, instead, the Lists service checks for unsaved changes and prompts you to save or discard the changes.

   > **Tip:** To save, you can also select **Save** from the **Actions** menu, or press Ctrl+M. To close, you can also select **Close** from the **Actions** menu, or press Ctrl+Q.

22.2.5 Personalizing and Customizing Lists

You can personalize your own view of a list instance, or you can customize a list instance, affecting everyone's view. Personalizations involve changes made in page *view* mode; while customizations involve changes made in page *edit* mode (that is, in Oracle Composer). Everyone can personalize their own view of a list; but page edit privileges are always required for list customization.

A second instance of a list is not affected by the customizations or personalizations 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 customizations affect everyone's view of a list instance, your own personalizations are layered over list customizations. For example, someone may customize a list containing columns A, B, and C, so that column C is first in list column order (C, A, B). You can then personalize the list so that column A is first in list column order in your personal view of the same list instance (A, B, C).

> **Note:** In page edit mode, you see only customizations. In page view mode, you see personalizations layered over customizations. If the same property is set in both customization and personalization, the personalized value takes precedence.
>
> Personalizations and customizations do you apply to lists when viewed through the List Manager task flow.

See Also: For more information about personalization and customization, see Section 10.2, "Customizing and Personalizing Page Content."

This section describes various personalizations and customizations you can make to a list instance. It contains the following subsections:

- Section 22.2.5.1, "Sorting List Data on a Column"
- Section 22.2.5.2, "Resizing List Columns"
- Section 22.2.5.3, "Changing Column Order on a List Instance"
- Section 22.2.5.4, "Freezing a Column Position"
- Section 22.2.5.5, "Wrapping Column Data"
- Section 22.2.5.6, "Applying Color Banding to List Rows"
- Section 22.2.5.7, "Filtering List Data"

22.2.5.1 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 **View** menu options. This section describes regular and advanced sorting. It includes the following subsections:

- Section 22.2.5.1.1, "Sorting List Data Using Column Icons"
- Section 22.2.5.1.2, "Performing an Advanced Sort of List Data"

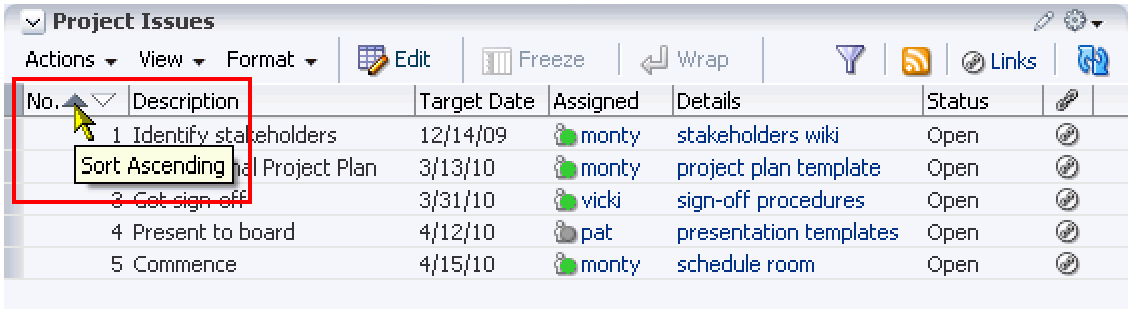
Note: To sort list data on a column in your view, perform the actions described in this section in page view mode. To sort list data on a column in everyone's view, perform the actions described in this section in page edit mode.

When your WebCenter Spaces application is running against an Oracle database, a click on a column header in the List View results in a linguistic sort based on your locale. For non-Oracle databases, the sorting is based on the linguistic sorting specified in the database (collation in the case of SQL Server). This means when you connect to a WebCenter Spaces 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.

22.2.5.1.1 Sorting List Data Using Column Icons To sort list data on a column using column icons:

1. Go to the list where you want to sort data.
2. Go to the column you want to use to control the sort, roll your mouse over the column header, and 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) (Figure 22–44).

Figure 22–44 The Sort Icons on a List Column Header



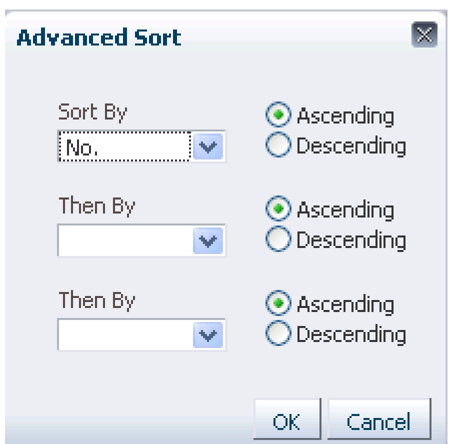
> **Tip:** You can also sort list data on a column by selecting a column and then selecting **Sort** and then **Ascending** or **Descending** from the **View** menu. You can right-click a column and select these options from a context menu.

22.2.5.1.2 Performing an Advanced Sort of List Data The **View** menu provides an **Advanced** option that presents another way to sort list data.

To use the **Advanced** option to sort list data:

1. Go to the list where you want to specify a sort order.
2. From the **View** menu, select **Advanced** to open the Advanced Sort dialog (Figure 22–45).

Figure 22–45 Advanced Sort Dialog



3. From the **Sort By** dropdown 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. Look to future releases for this feature to be fully realized.

---

5. Click **OK**.

Tip: You can access the options described in the section by right-clicking a column and selecting from a context menu.

22.2.5.2 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.

Note: To resize list columns, the list must contain at least one row.

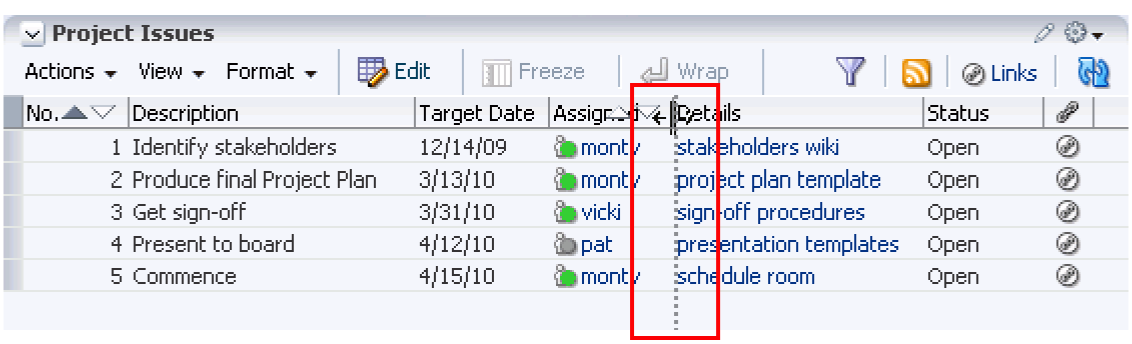
To resize list data on a column in your view, perform the following actions in page view mode. To resize list data on a column in everyone's view, perform the following actions in page edit mode.

Tip: After you personalize a list by resizing list columns in page view mode, select a list row. This triggers a server request, which is required to make your personalization persist across your browser sessions. If you navigate away from the page without performing such a server request in the list view, the column size is lost and reverts back to the previous size when you return to the page.

To resize list columns:

1. Go to the list where you want to resize columns.
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 (Figure 22–46).

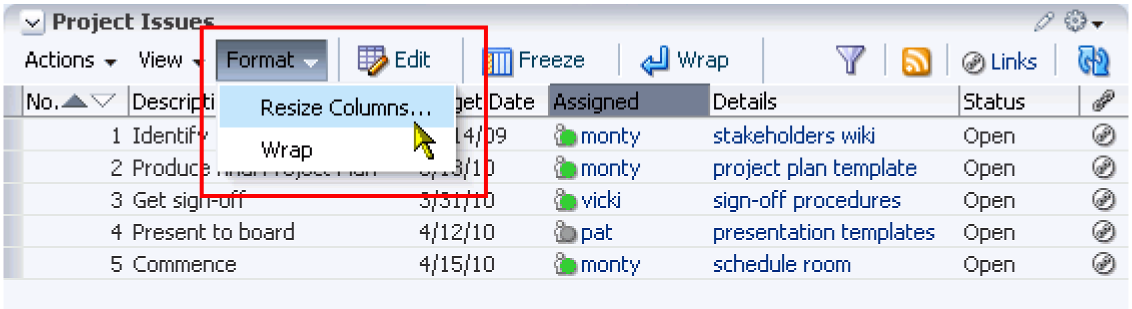
Figure 22–46 Column Splitter



   - In the list, select the column to resize.

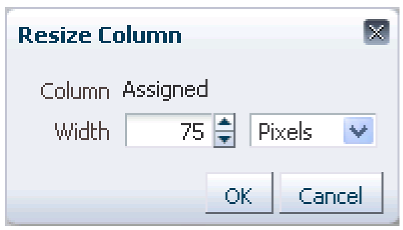
     From the **Format** menu, select **Resize Columns** (Figure 22–47).

Figure 22–47 Resize Columns Option on the Format Menu



In the resulting dialog, enter a column width and select a unit of measure (Figure 22–48).

Figure 22–48 Resize Column Dialog



Choose from:

– **Pixels**—To express column width in a specified number of pixels.

– **Percent**—To express column width as a percentage of the total list width.

Click **OK**.

Tip: You can access the options described in the section by right-clicking a column and selecting from a context menu.

22.2.5.3 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 through a reorder dialog. You can rearrange columns only when you are customizing or personalizing a list view. This feature is not available in the List Manager task flow or on the **Lists** page.

Note: To change column order in your view, perform the following actions in page view mode. To change column order in everyone's view, perform the following actions in page edit mode.

To reorder columns by dragging, the list must have at least one row.

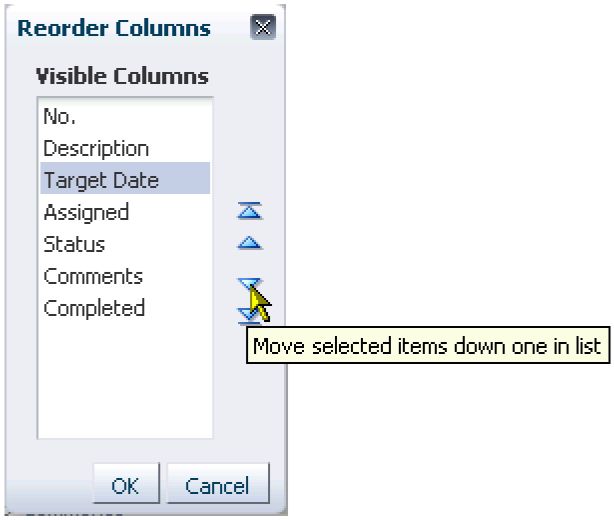
To change column order:

1. Go to the page that contains the list instance you want to change.
2. Rearrange list columns using one of the following methods:
   - Click and hold on a list column title, and drag and drop it to the desired location.

- Select **Reorder Columns** from the **View** menu.

  In the resulting dialog, select a column and click a **Move** icon to the right of the list of **Visible Columns** to reposition your selection (Figure 22–49).

Figure 22–49 Reorder Columns Dialog



Repeat until you have columns arranged in the desired order.

Click **OK**.

Tip: You can access the options described in the section by right-clicking a column and selecting from a context menu.

22.2.5.4 Freezing a Column Position

When a list is too wide to display all of its columns in one view, you can scroll the list left and right. If there is a column you always want to keep in view, you can use column freezing to hold a column in place during scrolling. Freezing causes a selected column to hold its position while the columns to the right of it scroll by. You can set **Freeze** on one column on a given list instance. Freezing holds the selected column and any column to the left of it in place.

Note: To freeze a column position in your view, perform the following actions in page view mode. To freeze a column position in everyone's view, perform the following actions in page edit mode.

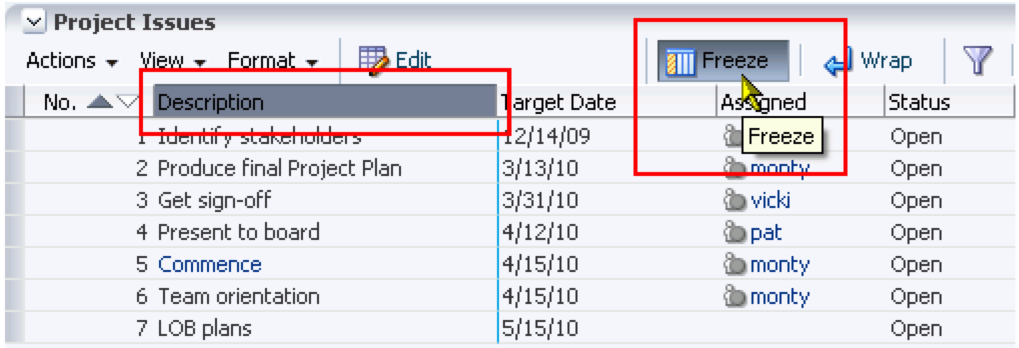
To freeze a column position:

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 the **Freeze** icon (Figure 22–50).

   Tip: You can also freeze a column by selecting it and then selecting **Freeze** from the **View** menu.

Figure 22–50 A Selected Column and the Freeze Icon



To unfreeze a column, select it as described in step 2, and click the **Freeze** icon again.

> **Tip:** You can access the options described in the section by right-clicking a column and selecting from a context menu.

22.2.5.5 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 (note that you can widen the column to view the data if you prefer, see Section 22.2.5.2, "Resizing List Columns").

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 the **Wrap** icon.

   > **Tip:** You can also wrap data by selecting the column and then selecting **Wrap** from the **Format** menu.
   >
   > 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.

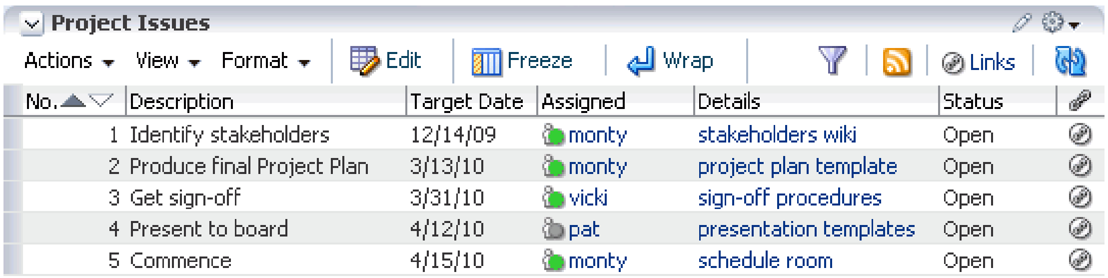
To turn wrapping off, select the relevant column and click the **Wrap** icon again.

22.2.5.6 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 (Figure 22–51).

Figure 22–51 Color Banding on List Rows



You can apply color banding to your personal view of a list instance or to everyone's view of a list instance. This section describes how. It contains the following subsections:

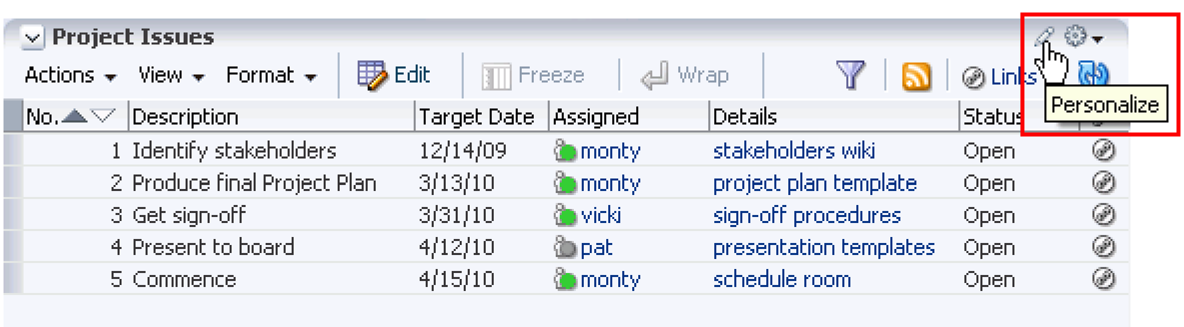
- Section 22.2.5.6.1, "Applying Color Banding to Your Personal View of a List"
- Section 22.2.5.6.2, "Removing Personal Color Banding"
- Section 22.2.5.6.3, "Applying Color Banding to Everyone's View of a List Instance"
- Section 22.2.5.6.4, "Removing Color Banding from Everyone's View of a List"

22.2.5.6.1 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:

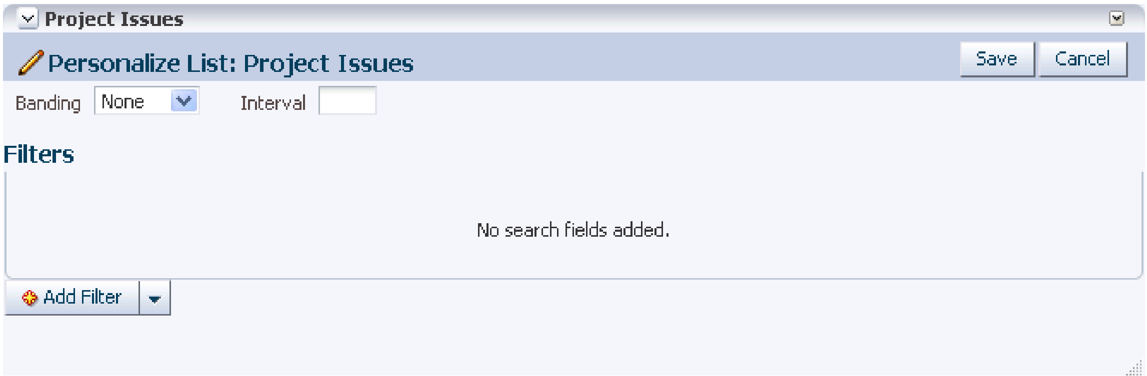
1. Go to the list you want to personalize with color banded rows or columns.
2. Click the **Personalize** icon on the task flow header (Figure 22–52).

Figure 22–52 Personalize Icon on a List Viewer Task Flow Header



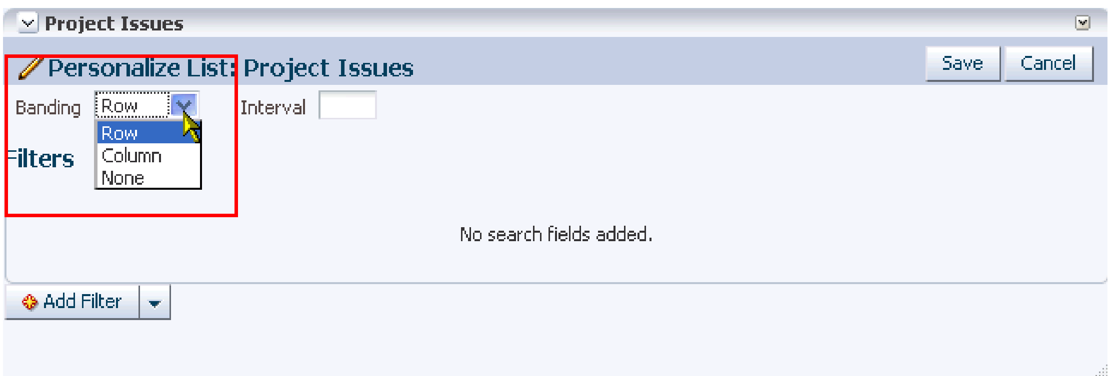
The List Viewer enters personalize list mode (Figure 22–53).

Figure 22–53 List Viewer Personalize List Mode



3. From the **Banding** pick list, select a banding style for the list instance (Figure 22–54):

Figure 22–54 The Banding Pick List



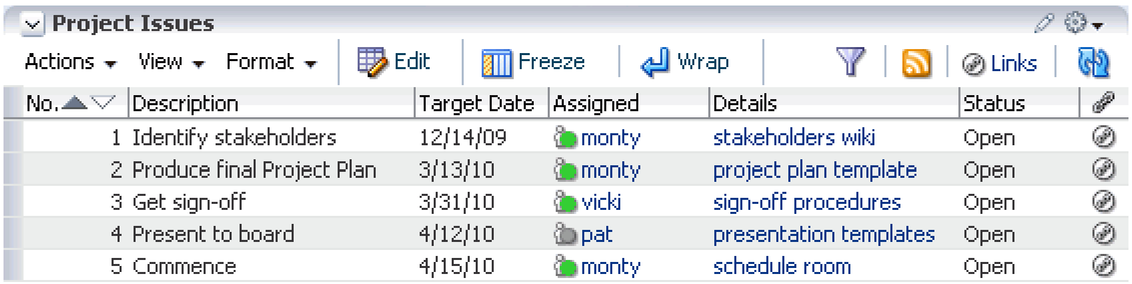
Choose from:

- **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 to skip between color bands.

   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. Figure 22–55 illustrates an interval value of `1`.

Figure 22–55 Color Banding on List Rows



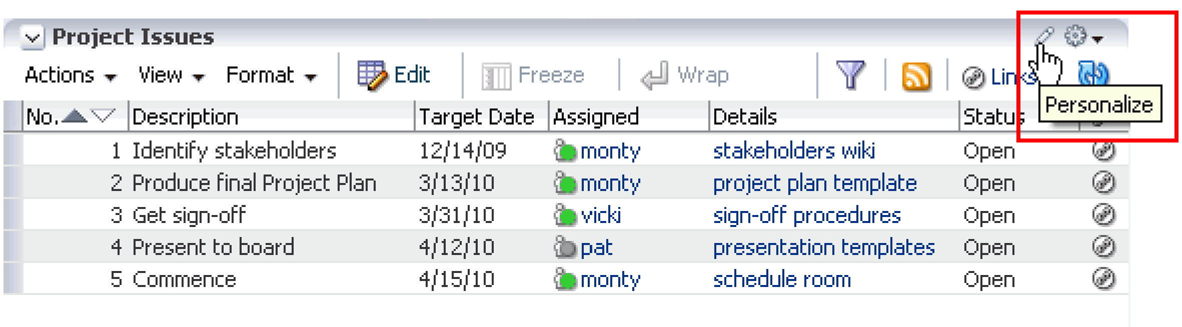
5. Click **Save** to save your settings and return to the list.

   List data is refreshed, now reflecting your color banding settings.

22.2.5.6.2 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 task flow header (Figure 22–56).

Figure 22–56 Personalize Icon on a List Viewer Task Flow Header



   The List Viewer enters personalize list mode.

3. From the **Banding** pick list, select **None**.
4. Click **Save** to save your settings and return to the list.

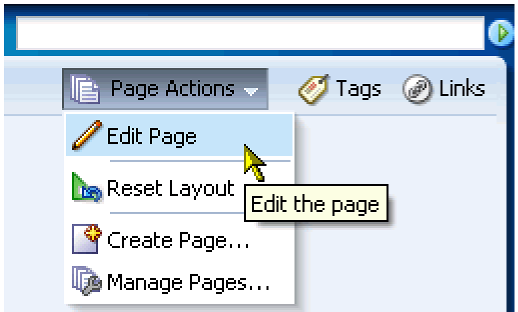
   List data is refreshed, now showing no color banding.

22.2.5.6.3 Applying Color Banding to Everyone's View of a List Instance When you want your color banding settings to affect everyone's view of a particular list instance, follow the steps in this section.

To apply color banding to everyone's view of a list instance:

1. Go to the list you want to customize with color banded rows or columns.
2. From the **Page Actions** menu, select **Edit Page** (Figure 22–57).

Figure 22–57 Edit Page Option on the Page Actions Menu



The page opens in Oracle Composer.

3. Go to the list instance you want to customize, and click the **Edit** icon on the task flow header (Figure 22–58).

Figure 22–58 Edit Icon on a List Viewer Task Flow Header

The list enters customize list mode (Figure 22–59).

Figure 22–59 List Viewer Customize List Mode

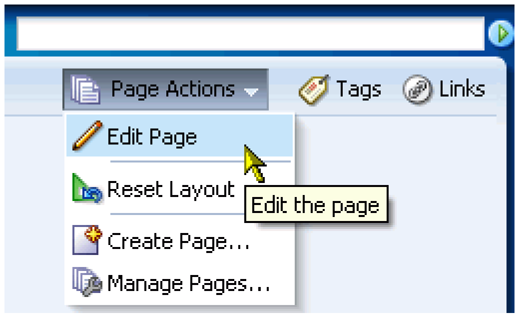
4. Configure color-banding settings as described in Section 22.2.5.6.1, "Applying Color Banding to Your Personal View of a List."

5. Click **Close** to exit Oracle Composer.

22.2.5.6.4 Removing Color Banding from Everyone's View of a List To remove color banding from everyone's view of a list instance:

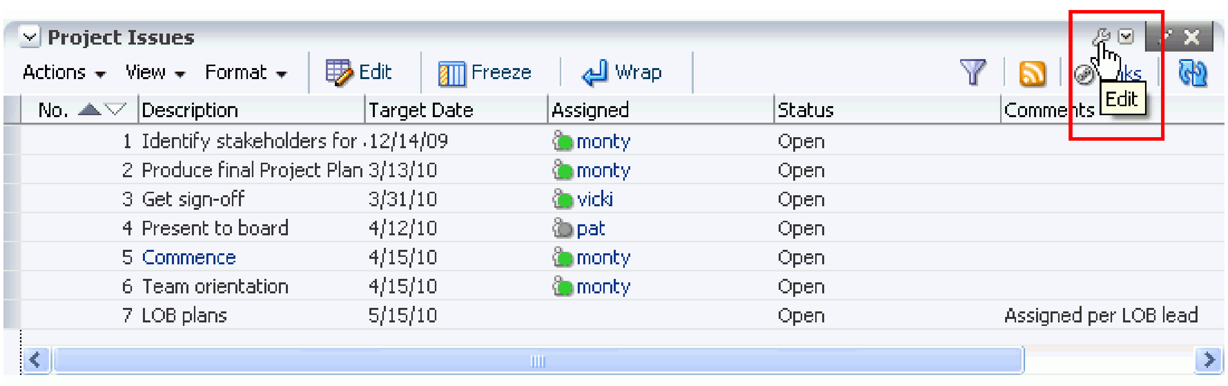
1. Go to the list from which to remove color banding.
2. From the **Page Actions** menu, select **Edit Page** (Figure 22–60) to open the page in Oracle Composer.

Figure 22–60 Edit Page Option on the Page Actions Menu



3. Go to the list instance you want to customize, and click the **Edit** icon on the task flow header (Figure 22–61).

Figure 22–61 Edit Icon on a List Viewer Task Flow Header



The List Viewer enters customize list mode.

4. From the **Banding** pick list, select **None**.
5. Click **Save** to save your changes and exit customize list mode.

   The list refreshes, with color banding removed.
6. Click **Close** to exit Oracle Composer.

22.2.5.7 Filtering List Data

The Lists service provides 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 List Manager task flows. Custom filtering that affects everyone's view of a list instance is available only with the List Viewer task flow.

This section describes the processes of applying ad hoc, permanent personal, and permanent list filters. It contains the following subsections:

- Section 22.2.5.7.1, "Applying an Ad Hoc Filter to a List Instance"
- Section 22.2.5.7.2, "Applying a Permanent, Personal Filter to a List Instance"
- Section 22.2.5.7.3, "Removing a Permanent, Personal List Filter"
- Section 22.2.5.7.4, "Applying Filters to Everyone's View of a List"
- Section 22.2.5.7.5, "Removing Filters from Everyone's View of a List"

22.2.5.7.1 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. This section describes how.

Note: *Ad hoc* list filtering applies only to *String* data-type values. 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:

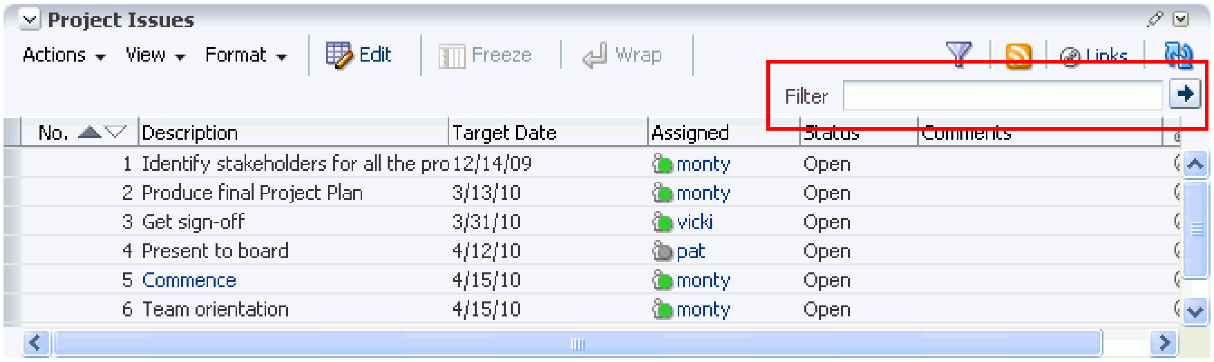
1. Go to the list that contains the data you want to temporarily filter.
2. Click the **Filter Rows** icon in the List toolbar (Figure 22–62).

   Tip: You can also select **Filter Rows** from the **Actions** menu.

Figure 22–62 The Filter Rows Icon

The **Filter** field opens (Figure 22–63).

Figure 22–63 The Filter Field



3. Enter your filtering criteria in the **Filter** field, and click the **Filter** icon to execute the filter.

   All row details that match the filtering criteria are shown.

4. Click the **Filter Rows** icon again to hide the **Filter** field and remove the temporary filter.

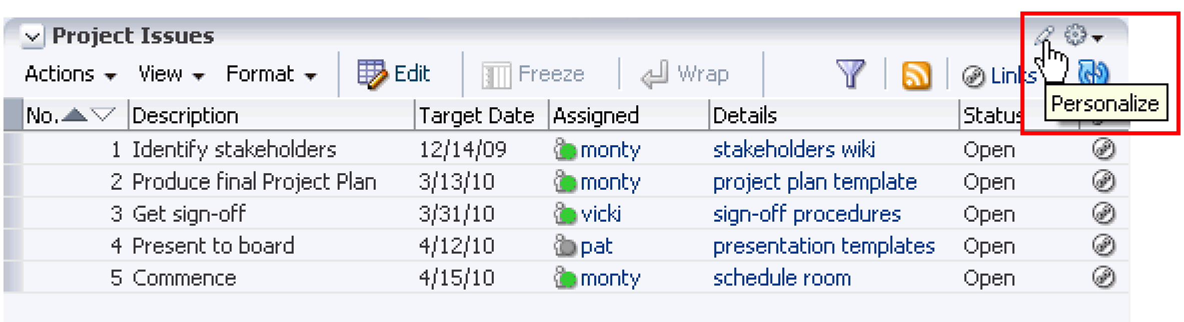
   Tip: You can also select **Cancel Filter** from the **Actions** menu.

22.2.5.7.2 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. We use the term *permanent* to convey the fact that you can keep your list filtered in a particular way for as long as you like. 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:

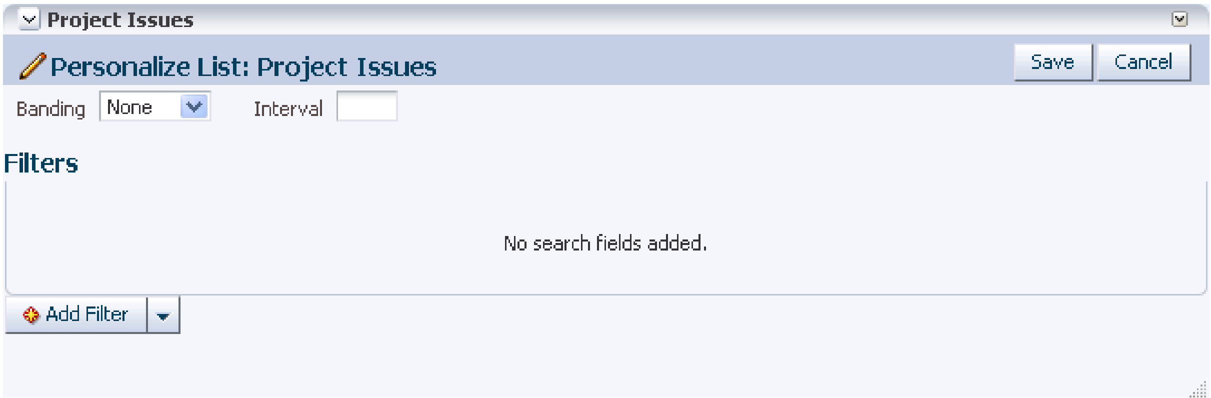
1. Go to the list that contains the data you want to permanently filter.
2. Click the **Personalize** icon on the task flow header (Figure 22–64).

Figure 22–64 Personalize Icon on a List Viewer Task Flow Header



The list enters personalize list mode (Figure 22–65).

Figure 22–65 List Viewer Personalize List Mode

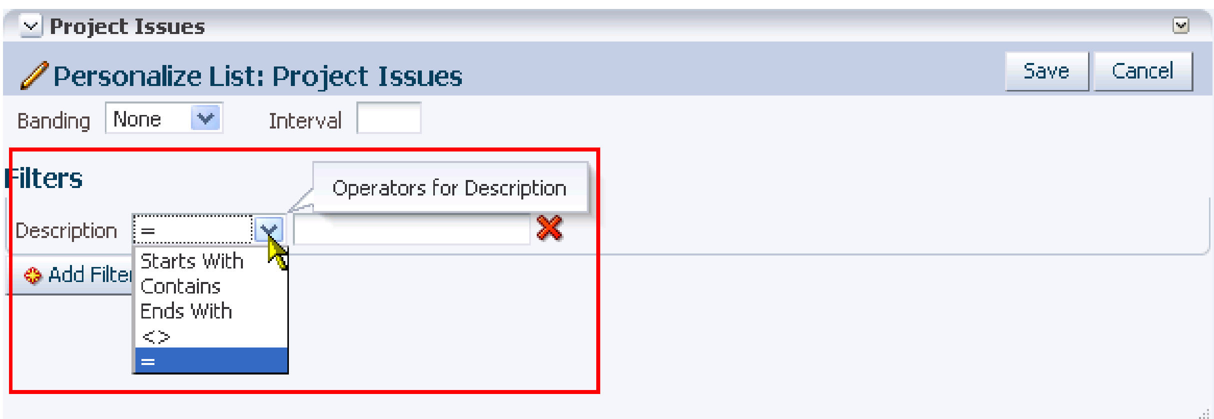


3. From the **Add Filter** dropdown list, select a column against which to apply a filter.

   The selected column appears, ready for a filter definition.

4. Select an operator from the dropdown list, and enter the filter content in the field provided (Figure 22–66).

Figure 22–66 Filter Operators on a List Column



The filter operators that appear on the dropdown list vary according to the data type of the selected column. Table 22–3 lists and describes filter operators as they apply to different data types.

Table 22–3 Filter Operators for List Data Types

Data Type	Description
`String`	Use `String` data type filter operators to specify that string values in the selected column must: ■ = —Match the characters you specify ■ Starts With—Start with the character(s) you specify ■ Contains—Include the character(s) you specify ■ Ends With—End with the character(s) you specify ■ <>—Contain any string other than the one you specify
`Number`	Use `Number` data type filter operators to specify that number values in the selected column must be: ■ = —Equal to the value you specify ■ >= —Equal to or greater than the value you specify ■ <>—Greater or lesser than the value you specify ■ >—Greater than the value you specify ■ <= —Equal to or lesser than the value you specify ■ <—Lesser than the value you specify
`DateTime`	Use `DateTime` data type filter operators to specify that date and time values in the selected column must be: ■ = —The same as the date or date and time that you specify ■ >= —More recent or the same as the date or date and time that you specify ■ <>—Any date or date and time other than the value you specify ■ >—More recent than the date or date and time that you specify ■ <= —Preceding or matching the date or date and time that you specify ■ <—Preceding the date or date and time that you specify
`Boolean`	Use `Boolean` data type filter operators to specify that Boolean values in the selected list column must: ■ = —Match the value you specify ■ <>—Not match the value you specify The Boolean value is expressed as a checkbox. A checked box means TRUE or YES; a cleared box means FALSE or NO.
`Person`	Use `Person` data type filter operators to specify that person values in the selected list column must: ■ = —Match the user name you specify ■ Starts With—Start with the character(s) you specify ■ Ends With—End with the character(s) you specify ■ Contains—Include the character(s) you specify ■ <>—Contain any user name other than the one you specify

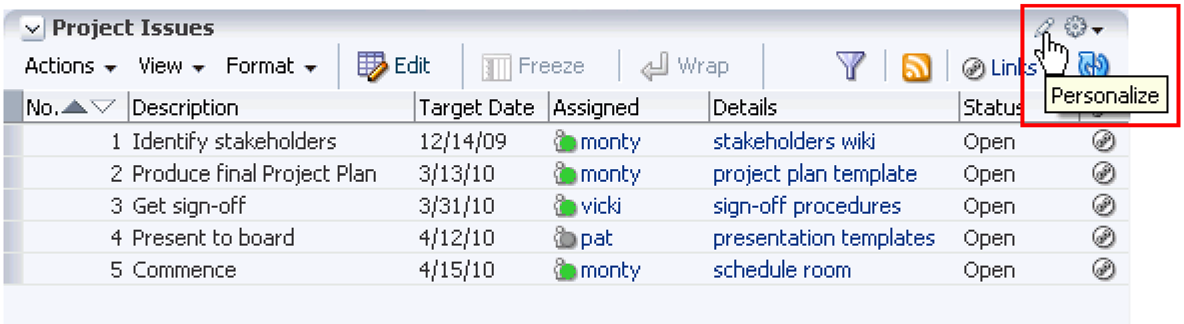
5. Click **Save** to save your filter criteria and return to the list.

   The list is refreshed, now displaying data that matches your filter criteria.

22.2.5.7.3 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 task flow header (Figure 22–67).

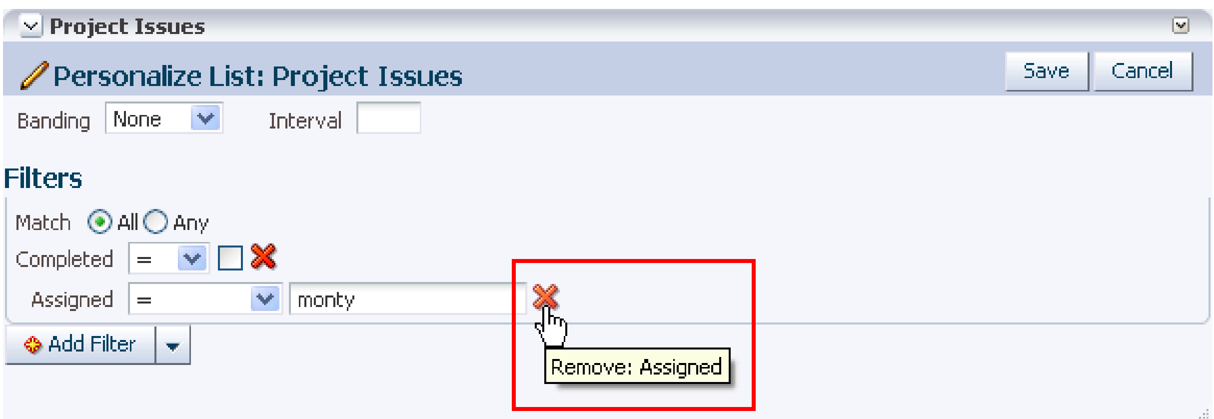
Figure 22–67 Personalize Icon on a List Viewer Task Flow Header



The List Viewer enters personalize list mode.

3. Click the **Remove** icon next to the filtering criteria you want to remove (Figure 22–68), and then click **Save**.

Figure 22–68 Remove Icon Next to a Filter



List data is refreshed, now displaying any data previously hidden by a filter.

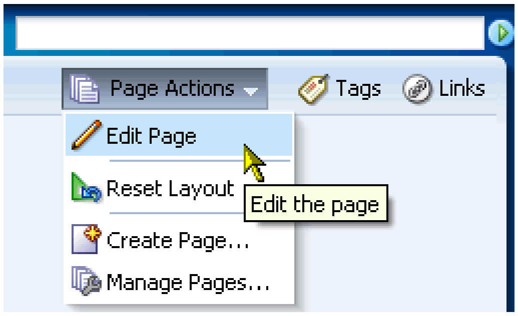
22.2.5.7.4 Applying Filters to Everyone's View of a List If you want the list filters you create to apply to all users' views of a particular list instance, simply create the filters in page edit mode.

> **See Also:** For information about removing a filter from everyone's view of a list instance, see Section 22.2.5.7.5, "Removing Filters from Everyone's View of a List."

To apply filters to everyone's view of a list:

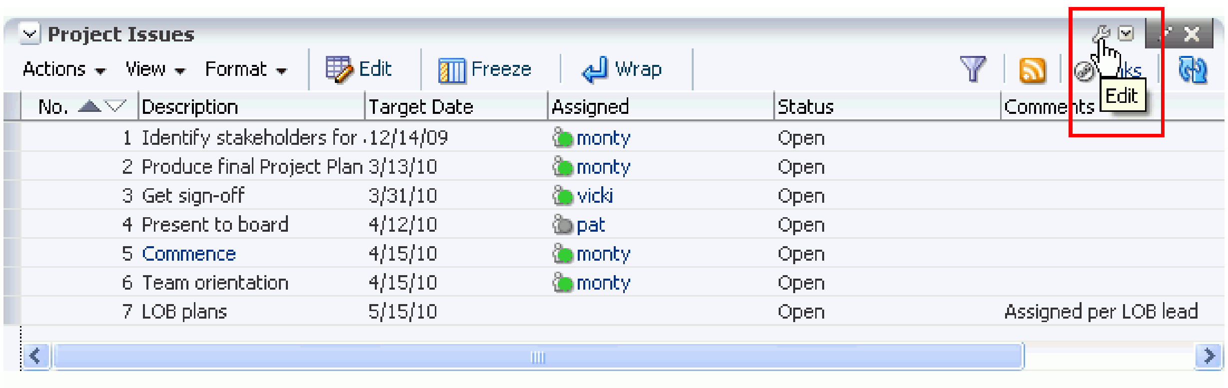
1. Go to the list that contains the data you want to filter from everyone's view.
2. From the **Page Actions** menu, select **Edit Page** (Figure 22–69) to open the page in Oracle Composer.

Figure 22–69 Edit Page Option on the Page Actions Menu



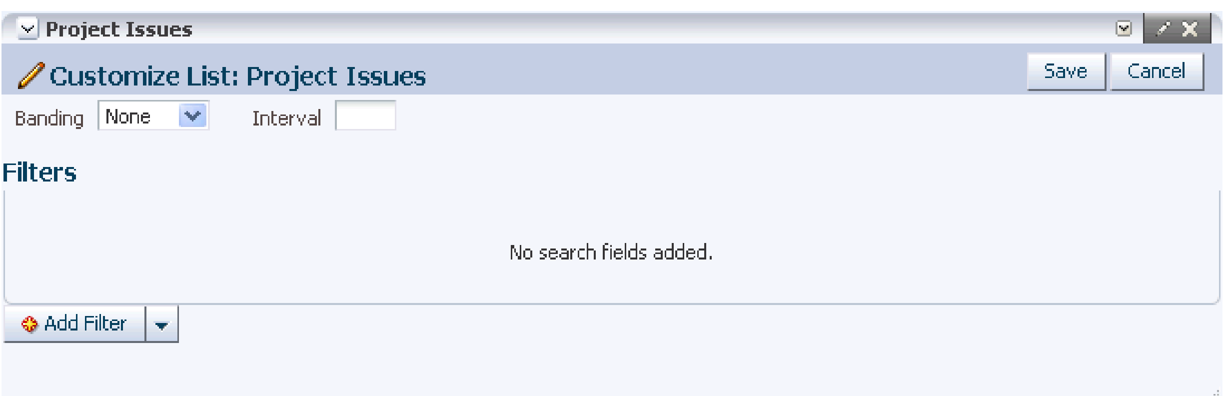
3. Go to the task flow instance you want to filter, and click the **Edit** icon on the task flow header (Figure 22–70).

Figure 22–70 Edit Icon on a List Viewer Task Flow Header



The list enters customize list mode (Figure 22–71).

Figure 22–71 List Viewer in Customize List Mode



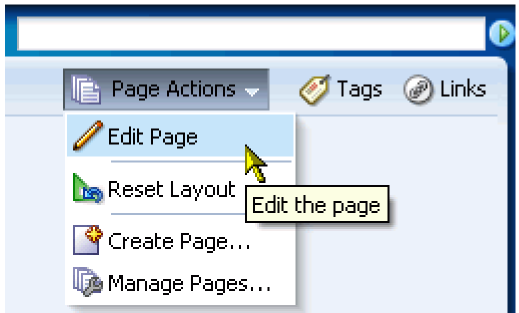
4. Create and apply filtering criteria as described in Section 22.2.5.7.2, "Applying a Permanent, Personal Filter to a List Instance."

5. Click **Close** to exit Oracle Composer.

22.2.5.7.5 Removing Filters from Everyone's View of a List To remove a filter from everyone's view of a list:

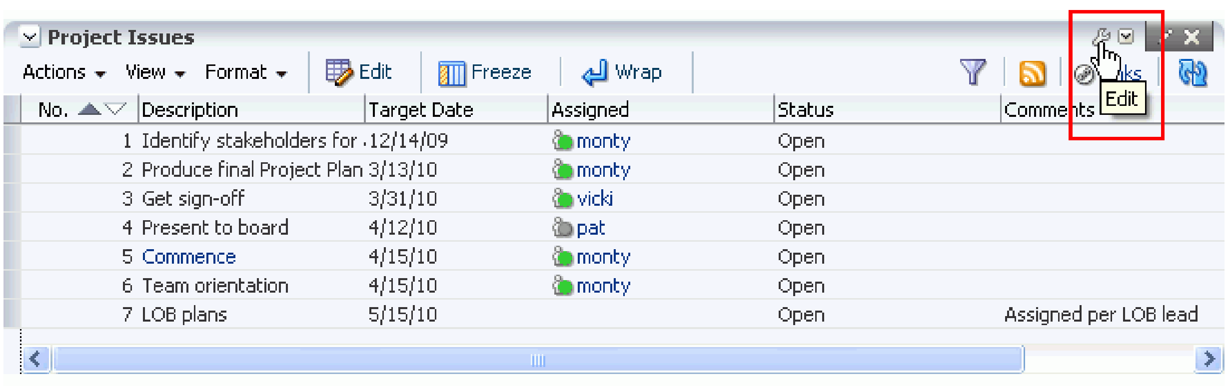
1. Go to the list from which to remove a filter.
2. From the **Page Actions** menu, select **Edit Page** (Figure 22–72) to open the page in Oracle Composer.

Figure 22–72 Edit Page Option on the Page Actions Menu



3. Go to the task flow instance from which you want to remove a filter, and click the **Edit** icon on the task flow header (Figure 22–73).

Figure 22–73 Edit Icon on a List Viewer Task Flow Header



The list enters customize list mode.

4. Click the **Remove** icon next to the filters you want to remove (Figure 22–74), and then click **Save**.

Figure 22–74 Remove Icon Next to a Filter

List data is refreshed, now displaying all unfiltered data.

5. Click **Close** to exit Oracle Composer.

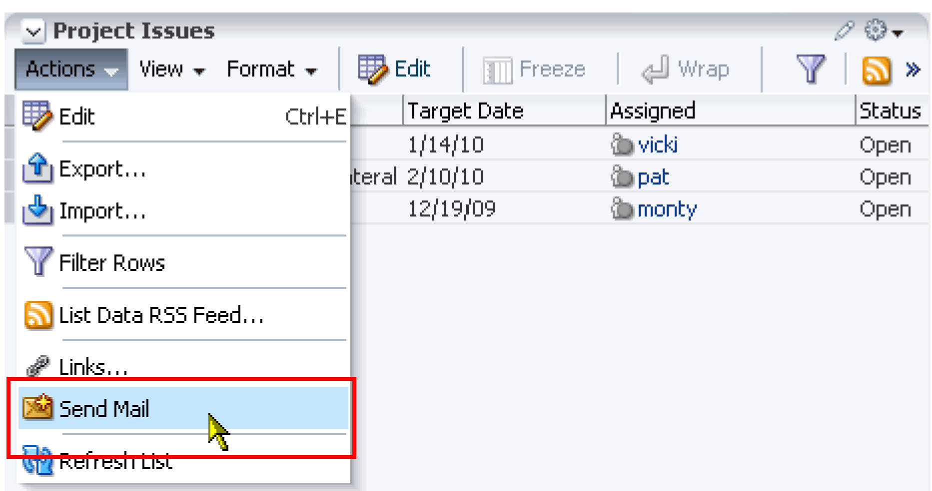
22.2.6 Sending a Link to a List to Other Users

The list **Actions** menu 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. Log in, and go to the list instance you want to send as a link through mail.
2. From the list **Actions** menu, select **Send Mail** (Figure 22–75).

Figure 22–75 Send Mail Option on a List Actions Menu



A compose message window opens with the following information:

- The name of the group space from which the list instance originates
- A link to the group space
- The list title and description
- 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 group space that contains the list instance.

3. Compose the message and send as you would any other mail message.

22.2.7 Exporting a List to a Spreadsheet and Importing an Exported List

The Lists service provides a means of exporting and importing lists. If you have `View` access to the list, you can export it to a Microsoft Excel 2007 format (`.xlsx`) and revise list data in Excel. If you have `Edit` access to the list, you can import the revised list back into WebCenter Spaces.

This section describes how to export and import lists and provides information about additional software that may be of use in this process. It contains the following subsections:

- Section 22.2.7.1, "What You Should Know About Exporting and Importing Lists"
- Section 22.2.7.2, "Exporting a List to a Spreadsheet"
- Section 22.2.7.3, "Importing an Exported List"

22.2.7.1 What You Should Know About Exporting and Importing Lists

Use list export and import to add and revise list rows in a Microsoft Excel spreadsheet. List structure is preserved during export and import, as are any links you may have associated with the list or list rows.

If, in WebCenter Spaces, you add a link to a row of an exported list, then import the list, the link is preserved. When you export a list with links, only the list is exported, not the links. The list takes with it identifiers that preserve the association of the list with its links. However, if you delete a link on a row in WebCenter Spaces, the link is not restored when the list is imported.

After you export a list, other changes to content in WebCenter Spaces are overwritten when you import the list. Before content is overwritten, a confirmation dialog provides you with an opportunity to stop the import and preserve the WebCenter Spaces changes.

Importing a spreadsheet cannot be used to create a list or modify list structure. You can import a spreadsheet only into the list from which it was exported. However, you can export a rowless list to a spreadsheet, add rows in Excel, and then import it.

You must take care when you export a list not to revise list structure in Excel nor in WebCenter Spaces. You cannot import a spreadsheet if the list structure is changed in WebCenter Spaces after export. You can add and remove list rows in the spreadsheet; such changes are reflected in the list on import.

Adding and removing list columns in the spreadsheet does not affect the list structure. Consequently, when you import a spreadsheet with columns that were removed through Excel, the import succeeds. The columns continue to appear in the imported list; though the deleted column data does not.

When you export a list from WebCenter Spaces, the exported spreadsheet file is in Microsoft Excel 2007 format (.xlsx). To import a spreadsheet, it must also be in this format. If you have Excel 2007 installed, you may export list data to a spreadsheet, edit and save the data in Excel 2007, and then import the spreadsheet.

If you have an older version of Excel installed, you may still use the export/import spreadsheet feature by installing the Microsoft Office Compatibility Pack for Word, Excel, and PowerPoint 2007 File Formats.

You can find the compatibility pack at the following location:

`http://www.microsoft.com/downloads/details.aspx?FamilyId=941B3470-3AE9-4AEE-8F43-C6BB74CD1466&displaylang=en`

You can find instructions for using the compatibility pack at the following location:

`http://support.microsoft.com/kb/924074`

The compatibility pack enables you to save spreadsheets in `.xlsx` format directly in Excel versions 2000 and 2003. It enables you to convert Excel 2002 spreadsheets in `.xlsx` format through Windows Explorer.

> **Note:** It is possible to open a spreadsheet in `.xlsx` format directly in Excel in read-only mode and then save the file in `.xls` format from Excel. However, this conversion results in data loss that does not occur with the compatibility pack. The resulting file is missing data that is required to import the spreadsheet. Thus a subsequent import of the spreadsheet fails even after conversion back to `.xlsx` format.

To convert to `.xls` after export, right-click the exported spreadsheet (an `.xlsx` file) in Windows Explorer, select **Save As**, and choose the Microsoft Office Excel 97-2003 Worksheet (`*.xls`) in the Save as type dialog. Open the `.xls` file in Excel, edit, and save.

To convert the `.xls` spreadsheet to `.xlsx` before import, right-click the spreadsheet (an `.xls` file) in Windows Explorer, select **Save As**, and choose the Microsoft Office Excel 2007 Workbook (`*.xlsx`) in the Save as type dialog. Now you can import the new `.xlsx` file.

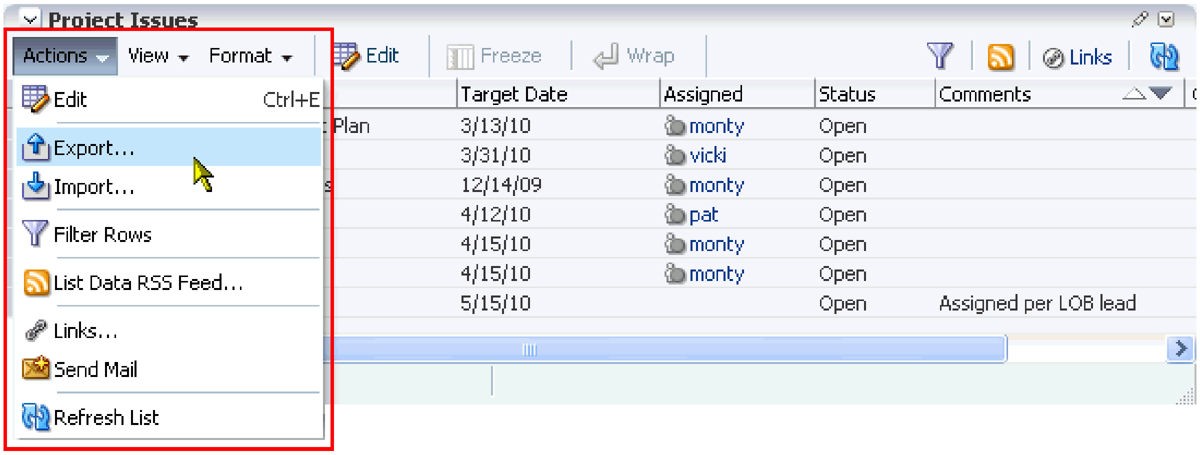
22.2.7.2 Exporting a List to a Spreadsheet

When you have *View* access to a list, you can export the list to a Microsoft Excel 2007 formatted file (`.xlsx`). Exporting enables you to use your Excel skills to easily add to and revise list data. Controls for exporting lists are available in both the List Viewer and List Manager task flows.

To export a WebCenter Spaces list:

1. Go to the list you want to export, and select **Export** from the **Actions** menu.

Figure 22–76 Export Button on a List



2. Follow your browser's prompts to save the exported `.xlsx` file to your local file system.

Note: If you are using Excel 2007, then you can either open the file directly in Excel or save it to the file system. If you are using Excel 2000, then you must save the file to the file system and convert the file in Windows Explorer using the compatibility pack.

According to the Microsoft support Web site (`http://support.microsoft.com/kb/924074`), you can now use Excel 2002 and 2003 to create, open, edit, and save files to the Excel 2007 (`*.xlsx`) format.

The list is saved as an `.xlsx` file. The file name is the list name, with underscores in lieu of character spaces. For example, `my list` becomes `my_list.xlsx`.

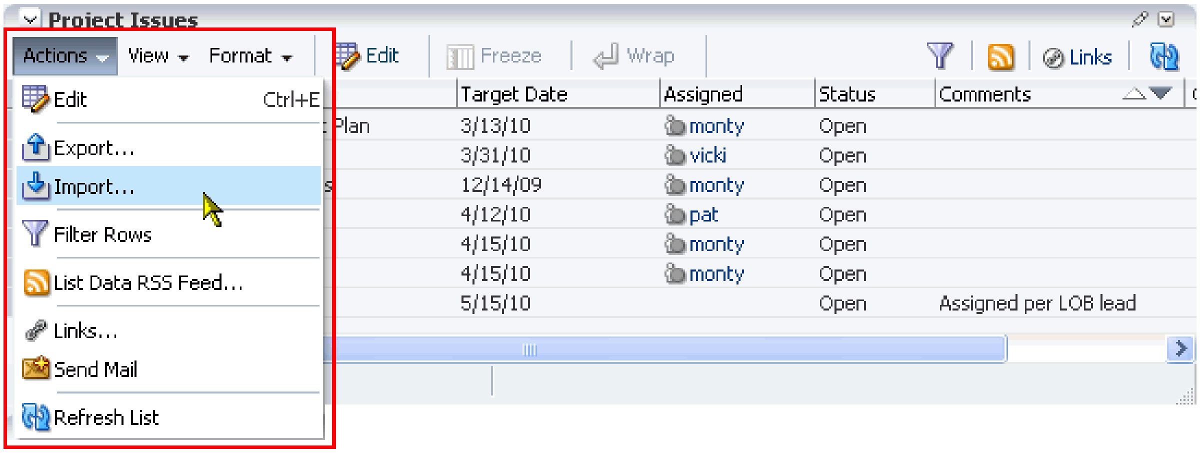
22.2.7.3 Importing an Exported List

After you have created or revised list data and saved it in Excel 2007 (`*.xlsx`) format, you can import it using controls available in both the List Viewer and List Manager task flows. To import list data, you must have, minimally, `Edit` permission on the list.

To import an exported list:

1. Go to the list into which to import a spreadsheet, and select **Import** from the **Actions** menu (Figure 22–77).

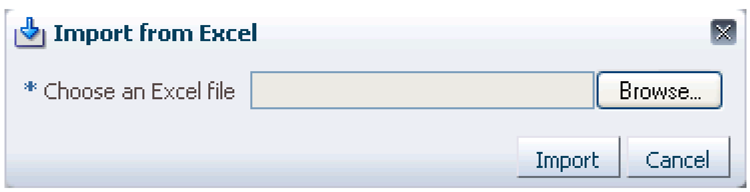
Figure 22–77 Import Button on a List



2. In the Import from Excel dialog (Figure 22–78), click the **Browse** button and navigate to and select the relevant spreadsheet.

   The file must be in Excel 2007 format (`*.xlsx`).

Figure 22–78 Import from Excel Dialog



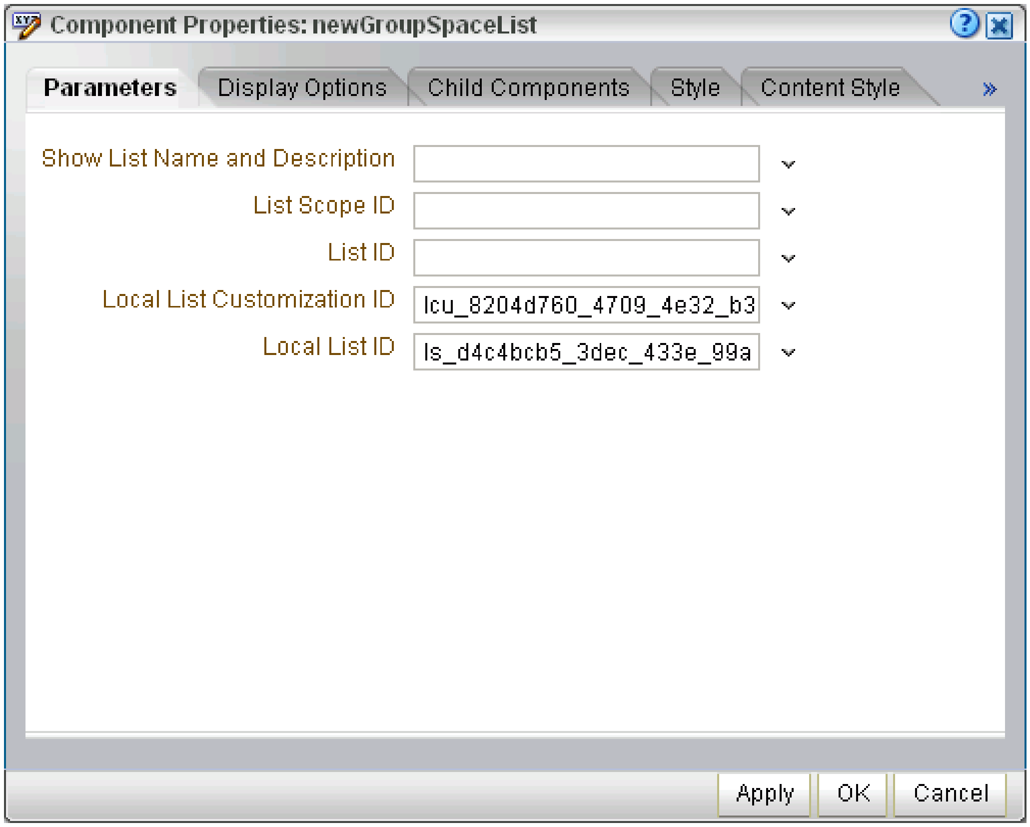
3. Click **Import**.

   The list is refreshed, now displaying the imported data. List data is validated on import. If any rows contain validation errors, such errors are presented in a dialog and the import is terminated. You can correct validation errors in the spreadsheet and import again.

22.3 Setting Lists Service Task Flow Properties

The List service task flows have associated properties, which users with sufficient privileges can access through the Component Properties dialog in Oracle Composer (Figure 22–79). Many properties are common to all task flows, and the method for accessing task flow properties is the same from task flow to task flow. Common task flow properties and how to access them are discussed in Section 10.4, "Setting Properties on Page Content."

Figure 22–79 Lists Service Task Flow Component Properties



The properties on the **Parameters** tab of the Component Properties dialog control the default task flow content and facilitate the wiring of the task flow to page parameters and page definition variables. These properties are unique to the task flow type. For more information, see Section 10.4.3, "Working with Component Parameters." For information about wiring pages and components, see Chapter 11, "Wiring Pages, Task Flows, Portlets, and UI Components."

Changes to the properties on the **Display Options**, **Style**, and **Content Style** tabs affect the appearance and behavior of the task flow for all users. These properties are common to all task flows. For more information, see Section 10.4.4, "Working with Component Display Options," and Section 10.4.7, "Working with Style and Content Style Properties."

The content of the **Events** tab depends on the events supported by the task flow. For more information, see Section 10.4.8, "Working with Component Contextual Events."

The **Child Components** tab displays all of the components contained within the current component. It provides controls for rearranging, showing, and hiding child components. Not all components contain children. So you may find this tab devoid of content. For more information, see Section 10.4.6, "Working with Child Components."

All properties on the **Parameters** and **Display Options** tabs provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the **Edit** icon next to a property field to open the editor. For more information about using the editor and for descriptions of common EL expressions, see Section 10.4.5, "Using Expression Language (EL) Expressions with Component Properties."

Table 22–4 describes the properties that are unique to the Lists service task flows. Note that list parameter values are set automatically and should not be changed.

Table 22–4 List Service Task Flow Properties: Parameters Tab

Property	Description
`List ID`	A unique identifier for the list to show Either `List ID` or `Local List ID` must have a value. This value is set automatically. Do not edit this value. This parameter appears in the properties for the Lists (List Viewer) task flow.
`List Scope ID`	A unique identifier for the scope containing the list If no value is present, the current scope is used. This value is set automatically. Do not edit this value. This parameter appears in the properties for the Lists (List Viewer) task flow.
`Local List Customization ID`	A unique identifier within the scope for the list customization This value is set automatically. Do not edit this value. This parameter appears in the properties for the Lists (List Viewer) task flow.
`Local List ID`	A unique identifier within the scope for the list to show Either `List ID` or `Local List ID` must have a value. This value is set automatically. Do not edit this value. This parameter appears in the properties for the Lists (List Viewer) task flow.
`Show List Name and Description`	A Boolean value representing whether to display the list name and description If no value is present, the list name and description are not shown. Values include `true` and `false`. This value is set automatically. Do not edit this value. This parameter appears in the properties for the Lists (List Viewer) task flow.

23 Working with the Mail Service

This chapter describes how to use the Send Mail feature and also the features provided through the Mail service. The Send Mail feature does not require the Mail service. That is, even if the Mail service has not been configured in your application, you can use the Send Mail feature with your local mail client.

This chapter includes the following sections:

- Section 23.1, "What You Should Know About the Send Mail Feature"
- Section 23.2, "What You Should Know About the Mail Service"
- Section 23.3, "Working with the Mail Service Task Flow"
- Section 23.4, "Setting Mail Service Task Flow Properties"

Audience

This chapter is intended for WebCenter Spaces users interested in viewing, creating, and managing mail. Much of this information also applies to custom WebCenter applications, though it is written with WebCenter Spaces users in mind. (For information about custom WebCenter applications, see "Integrating the Mail Service" in *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter*.)

For information about WebCenter Spaces seeded user roles, see *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter*.

Your application administrator has the authority to expose or hide task flows from a particular service. Tasks discussed in this chapter are not available to you if the relevant service is hidden.

23.1 What You Should Know About the Send Mail Feature

Throughout the WebCenter application, you can click the **Send Mail** icon to mail directly from that resource (Figure 23–1).

Figure 23–1 Send Mail Icon

For example, from an announcement, click the **Send Mail** icon to open a mail window prepopulated with information including the announcement text, author, date created, and location. You can edit and add to the mail, as necessary.

The way the mail window is prepopulated depends on the resource sending it. For example, from your Buddies list, click the **Send Mail** icon to open a mail window prepopulated only with the address of that person.

With group spaces, the mail can be addressed to the individual members of the group space, and, if the group space is configured with a distribution list, then it can be addressed to the distribution list. Group space moderators (and anyone granted the `Manage` or `Configure` permission on the group space) set this on the **Settings - Services - Mail** page. For more information, see Section 14.3.2, "Configuring a Custom Group Space Mail Distribution List."

If the number of recipients is so large that the mail cannot be prepopulated with the addresses, then you must either enter the addresses manually or set up a distribution list for the group space.

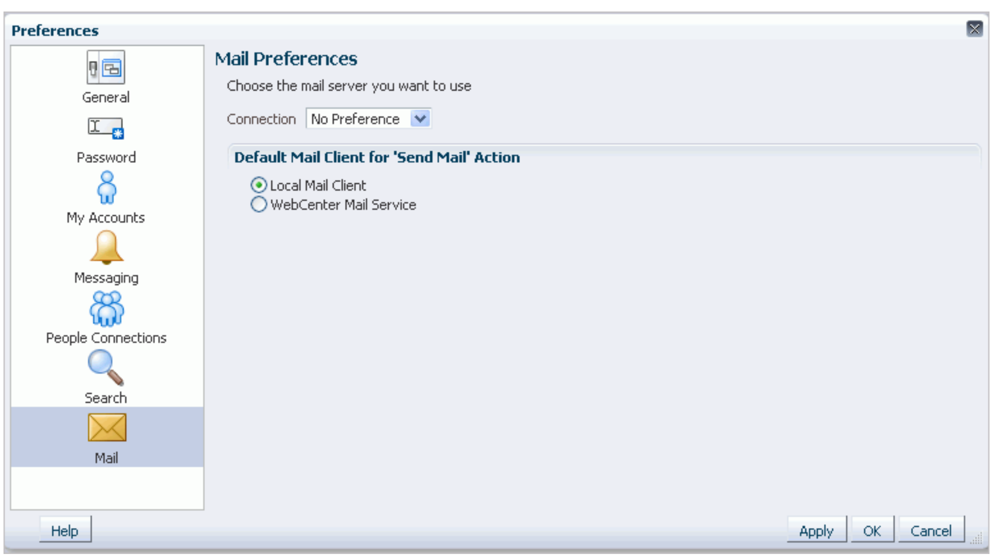
> **Tips:** With the Microsoft Outlook local mail client, you must configure Outlook to support comma-delimited mail addresses; that is, select the **Allow comma as address separator** checkbox on the **Tools - Options - Preferences - E-mail Options - Advanced E-mail Options** page.

23.1.1 Configuring the Send Mail Feature

The Send Mail feature does not require the WebCenter Mail service. That is, even if the Mail service has not been configured in your application, the Send Mail feature is available using your local mail client.

Your administrator determines the mail client that the Send Mail feature uses: either the WebCenter Mail service or a local mail client. The default value is a local mail client. If your administrator enabled users to override this mail client setting, then you can select to use a different mail client on the Mail Preferences page (Figure 23–2).

Figure 23–2 Mail Preferences for Send Mail



23.2 What You Should Know About the Mail Service

The Mail service conveniently exposes familiar mail functionality in your WebCenter application interface. The Mail service runs against the same mail server that provides your regular business mail, and the mail messages exposed in your WebCenter application 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 service does not replace your company mail, but rather enhances it by making it accessible within WebCenter.

The 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.

The Mail service fetches mails from the inbox folder only. It does not support fetching mails from other folders or moving messages.

The Mail service supports any mail server based on IMAP4 and SMTP protocol. A WebCenter Spaces application provides access to multiple mail connections. You can use a different mail connection by selecting it in the application's Preferences settings. For more information, see Section 3.10, "Selecting Your Preferred Mail Connection."

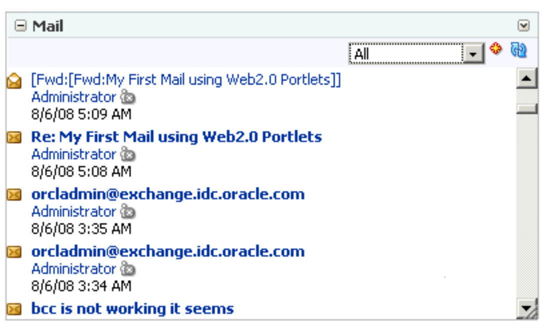
Note: You can add a Mail task flow to your page from the Catalog dialog in Oracle Composer. For information about adding a task flow, see Section 10.1.4, "Adding Task Flows to a Page."

However, all instances of the Mail task flow in an application run against the same mail server and it serves no purpose to add multiple Mail task flow instances. This is true for all service task flows that require connections to back-end servers, for example, task flows from Discussions, Announcements, and IMP services.

The Mail service exposes features from your mail server through the Mail task flow, which can be accessed in two ways:

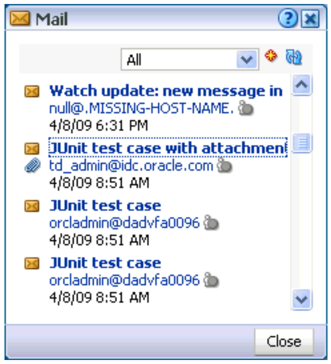
- The Mail task flow, available to both custom WebCenter applications and WebCenter Spaces (Figure 23–3)

Figure 23–3 The Mail Task Flow



- The **Mail** panel in the WebCenter Spaces Sidebar (WebCenter Spaces only) (Figure 23–4)

Figure 23–4 The Mail Panel in the WebCenter Spaces Sidebar



The Mail panel is simply the Mail task flow provided in the fixed location of the WebCenter Spaces Sidebar.

The Mail task flow presents the following features:

- A menu for specifying which messages to display
- A **Compose** icon for starting the process of creating a new message
- A **Refresh** icon for updating the task flow with new messages

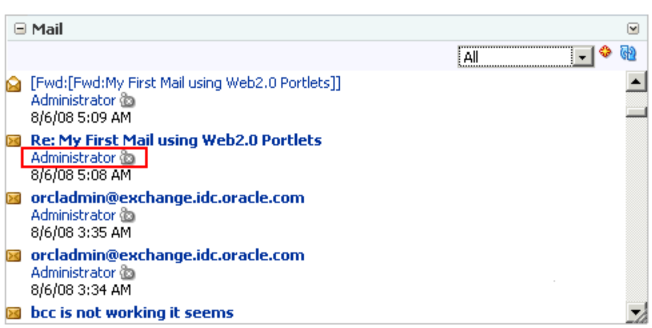
Within WebCenter Spaces, a group space moderator can configure the Mail service to automatically create a mailing list of all group space members. Once configured, as members are added to or deleted from the group, the mailing list is updated automatically. For more information, see Section 14.3.2, "Configuring a Custom Group Space Mail Distribution List." All mails sent to a group space mailing list are also posted to the group space discussion forum.

Use the Mail service to mail other WebCenter application users or any user recognized by the back-end server that supports the Mail service.

The Mail service is integrated with the Instant Messaging and Presence (IMP) service to provide additional options for contacting others. Each mail message includes the sender's user name and status icon (Figure 23–5), which you can click to open a context menu with options for starting a chat session, calling over VoIP, and so on.

Note: If the IMP service is not configured in your application, the status icons are grayed out and do not provide context menus.

Figure 23–5 User Name and Status Icon



For more information, see Chapter 20, "Working with the Instant Messaging and Presence Service (IMP)."

Users with page-edit privileges can access the task flow's region parameter through the Component Properties dialog in Oracle Composer. For information about accessing the Component Properties dialog and editing properties, see Section 10.4.2, "Setting Component Properties."

For more information about setting the Mail service task flow properties, see Section 23.4, "Setting Mail Service Task Flow Properties."

23.3 Working with the Mail Service Task Flow

The Mail task flow exposes your company's mail server features within the context of your application. Use the Mail task flow to view, respond to, and manage your personal mail.

This section provides information on how to use the Mail task flow. It contains the following subsections:

- Section 23.3.1, "Adding the Mail Service Task Flow to a Page."
- Section 23.3.2, "Logging in to Mail"
- Section 23.3.3, "Personalizing Your View of the Mail Task Flow"
- Section 23.3.4, "Opening Mail Messages"
- Section 23.3.5, "Downloading Mail Attachments"
- Section 23.3.6, "Composing and Sending Mail Messages"
- Section 23.3.7, "Sending Mail with Attachments"
- Section 23.3.8, "Removing Attachments from the Add Attachment Window"
- Section 23.3.9, "Replying to and Forwarding Mail"
- Section 23.3.10, "Refreshing Mail"
- Section 23.3.11, "Deleting Mail"

23.3.1 Adding the Mail Service Task Flow to a Page

For the steps to add a Mail service task flow to a page, see Section 10.1.4, "Adding Task Flows to a Page."

23.3.2 Logging in to Mail

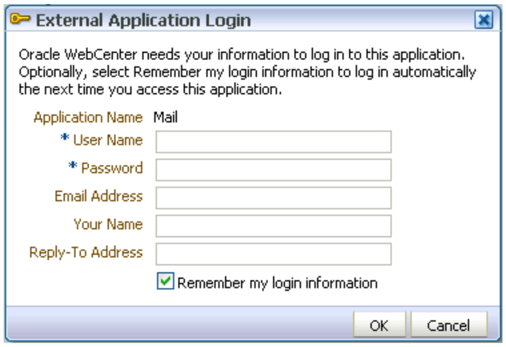
Before you can access your mail in a WebCenter application, you must provide your mail login credentials. The first time you access a Mail task flow, it displays the message depicted in Figure 23–6.

Figure 23–6 Login Message in a Mail Task Flow

To log in to a Mail task flow:

1. Go to a Mail task flow, and click the **Login to Mail** link (Figure 23–6) to open an External Application Login dialog (Figure 23–7).

Figure 23–7 External Application Login Dialog



Note: The External Application Login dialog may include additional fields and information, depending on the requirements of the service that provides it. For more information about external applications and storing your login credentials in a WebCenter Spaces application, see Section 3.6, "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, select **Remember my login information** to store your credentials.

   The next time you log in to the application, your mail credentials are retrieved from storage and you are logged in.

4. Click **OK**, and the Mail task flow displays mails from your inbox.

23.3.3 Personalizing Your View of the Mail Task Flow

You can personalize your view of the Mail task flow by filtering the number of displayed messages. For example, you can select to display only the messages that were delivered **Today**, **Since Yesterday**, **This Week**, or **This Month**. Additionally, you can select to display **All** messages in your inbox.

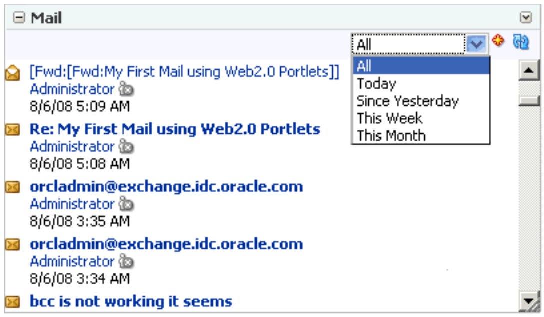
Note: By default, the Mail service displays the 50 most recent mail messages from your mail server inbox folder. However, if required, your Fusion Middleware administrator can configure this to a higher value, if your server supports the increase in memory cache that fetching additional mail requires. Care should be taken to have a value suitable to your environment. This value impacts all users. That is, if the Mail service is configured to read 200 recent mail messages, then the Mail service reads 200 recent mail messages for all users.

Personalizations affect only your view of the Mail task flow. No other user's view is changed because of your selection.

To personalize your view of the Mail task flow:

1. Go to the Mail task flow.
2. Open the menu at the top of the task flow (Figure 23–8).

Figure 23–8 The Mail Personalization Menu



3. Select a display option.

   Choose from:

   - **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 task flow redraws, displaying only those messages that match your selection.

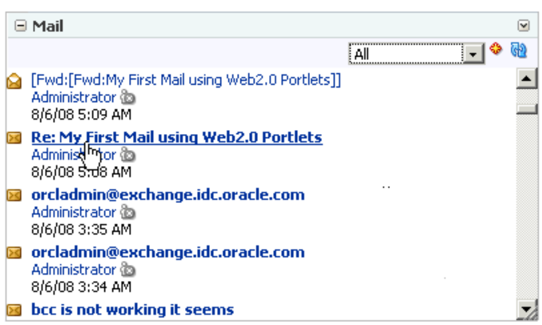
23.3.4 Opening Mail Messages

The messages that display in your Mail task flow are the same messages that display in your regular mail application inbox. You open them in much the same way, too.

To open a mail message:

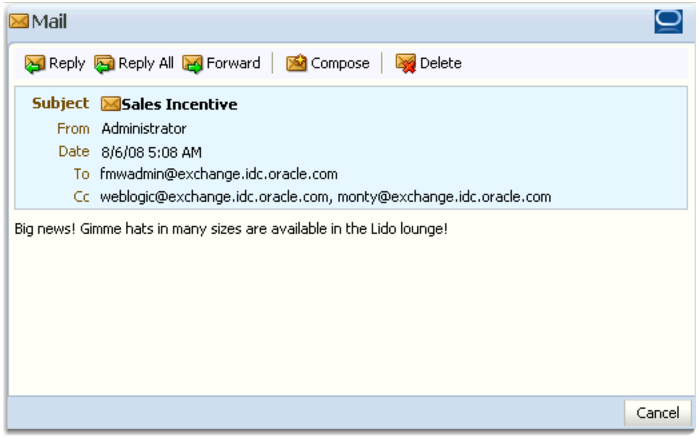
1. Go to a Mail task flow, and click the link to the message you want to open (Figure 23–9).

Figure 23–9 A Mail Message Link



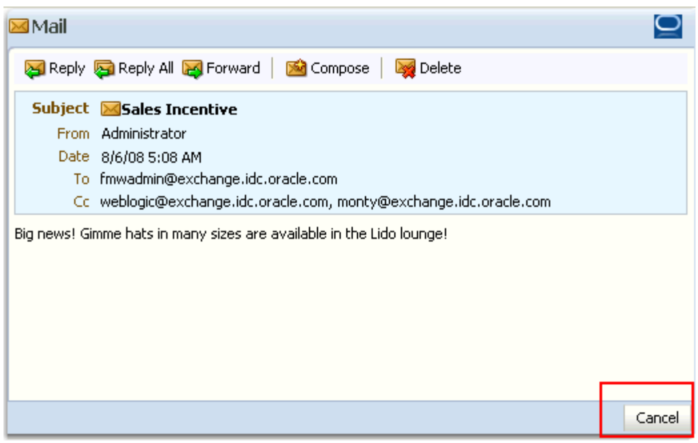
   The message opens (Figure 23–10).

Figure 23–10 A Mail Message



2. After reading the message click the **Cancel** button to close the message (Figure 23–11).

Figure 23–11 The Cancel Button on a Mail Message



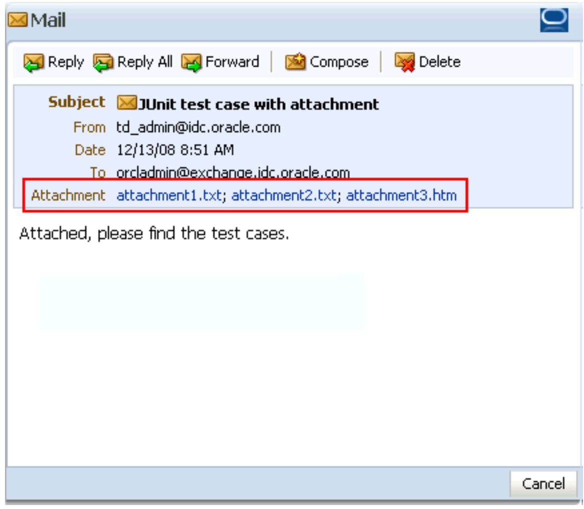
Note: HTML reports, tables, images that are inlined (copy paste), and fonts viewed in a mail message may not render correctly. The Mail service requires HTML data to be well-formed to display as expected in a mail message.

The mail should show everything that your browser supports. However, some tags, like `<script>`, are encoded and disabled from execution.

23.3.5 Downloading Mail Attachments

Attachments display in mail messages as links (Figure 23–12).

Figure 23–12 Mail Attachments



Accessing files associated with attachments is the same as accessing a file from any browser window: simply 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 local drive. This is browser behavior, so the way you follow through depends on the browser you use.

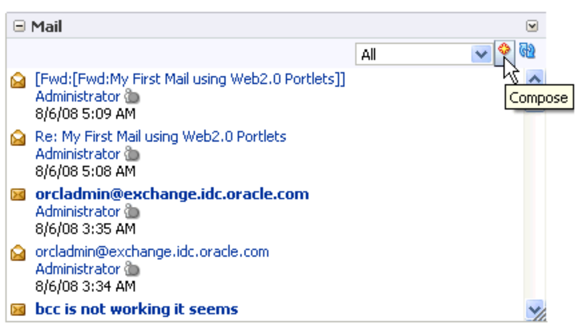
23.3.6 Composing and Sending Mail Messages

Composing and sending messages through the Mail service in a WebCenter application is very much like doing so in your regular mail.

To compose and send a mail message:

1. In a Mail task flow, click the **Compose** icon (Figure 23–13).

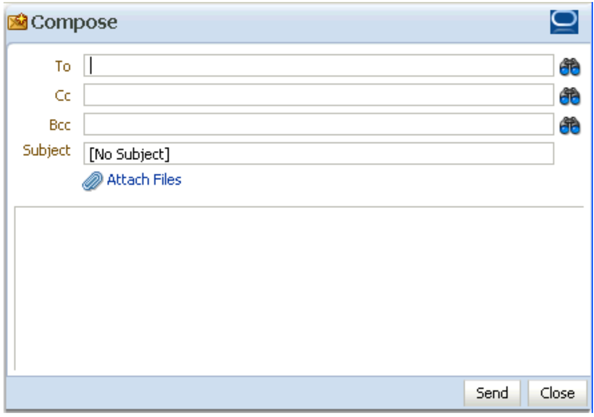
Figure 23–13 The Compose Icon on a Mail Task Flow



2. In the **Compose** window (Figure 23–14), enter recipients in the **To**, **Cc**, and **Bcc** fields as you require.

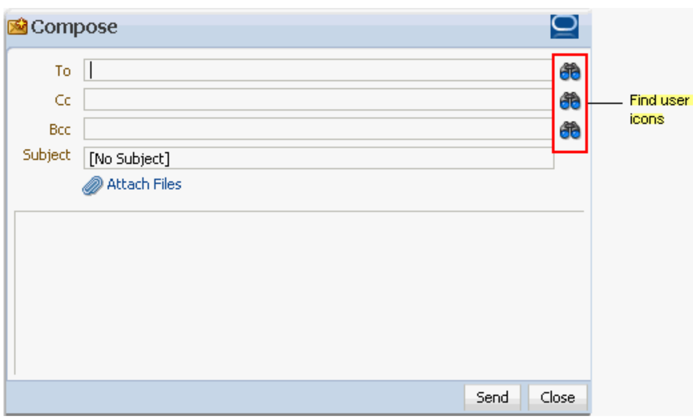
   In a given field, separate multiple entries with a comma (,).

Figure 23–14 Compose Window



The **Compose** window is directly connected to your mail server, so you can use the **Find User** icons (Figure 23–15) to find mail addresses and contacts.

Figure 23–15 Find User Icons in a Compose Window



Click the **Find User** icon and, in the resulting dialog, enter—minimally—the first two characters of the user name for which you are searching. Click the **Search** button, and all names matching your search criteria appear in the results area.

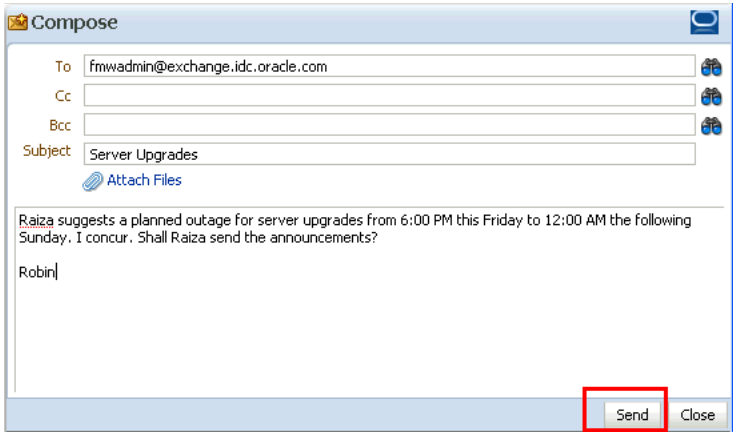
3. In the **Subject** field, enter a subject for your message.

   Enter up to 255 characters.

4. Compose your message. The Mail service supports only plain text messages.

5. Click the **Send** button (Figure 23–16).

Figure 23–16 The Send Button in a Compose Window



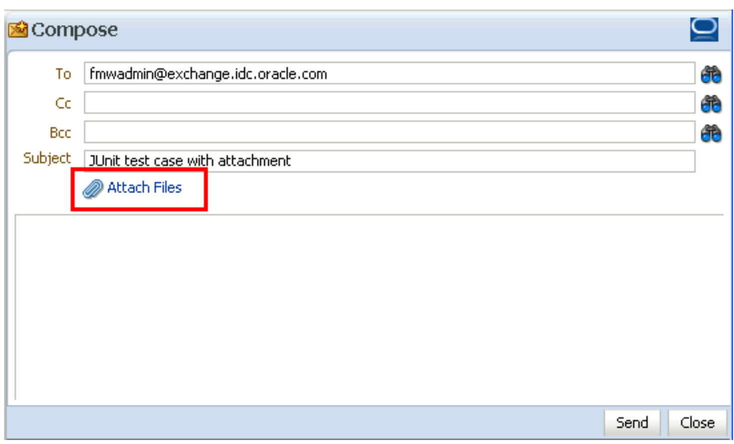
23.3.7 Sending Mail with Attachments

Just like your regular mail, you can use the Mail task flow to send messages with attachments.

To send a mail with attachments:

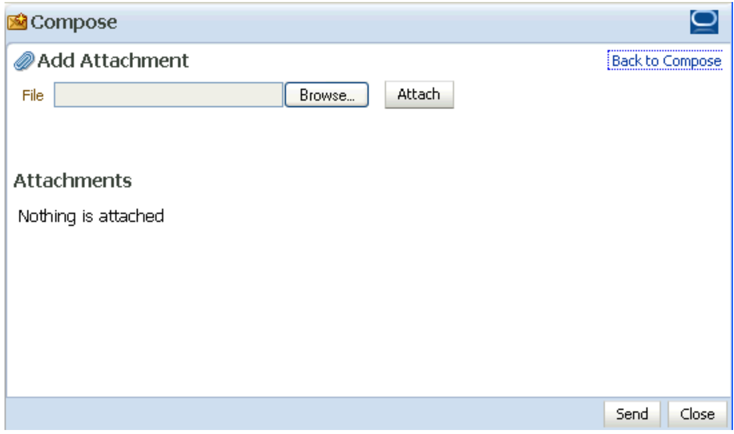
1. Create a mail message as described in Section 23.3.6.
2. In the **Compose** window, click the **Attach Files** link (Figure 23–17).

Figure 23–17 The Attach Link



The **Add Attachment** window opens (Figure 23–18).

Figure 23–18 The Add Attachment Window



3. Click the **Browse** button to locate and select an attachment.
4. Click the **Attach** button 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.

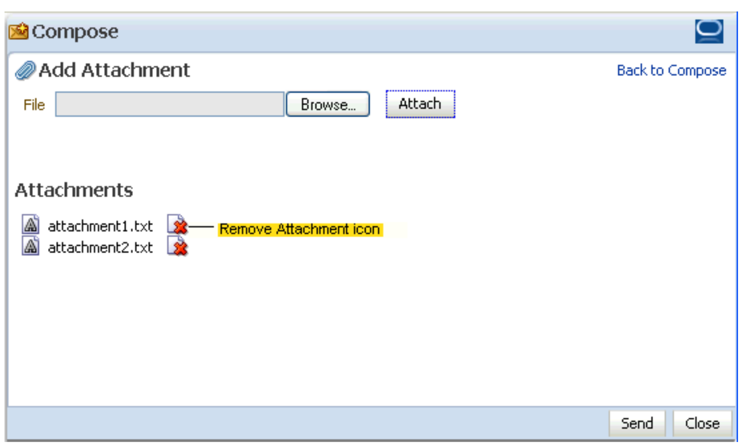
   Note: It is recommended that you avoid attaching large files, as this causes the server to slow down or not respond. If you attach large files (greater than 2MB), then because of how the HTTP protocol handles attachments, the system reports an error only after reading all of the 2MB characters.

   ---

5. Repeat steps 3 and 4 to add additional attachments.

   Attachments are listed under the **Attachments** heading in the **Add Attachment** window (Figure 23–19).

Figure 23–19 Attachments in the Add Attachment Window



   A **Remove Attachment** icon appears next to each attachment (Figure 23–19). Click this to remove a selected attachment from the window.

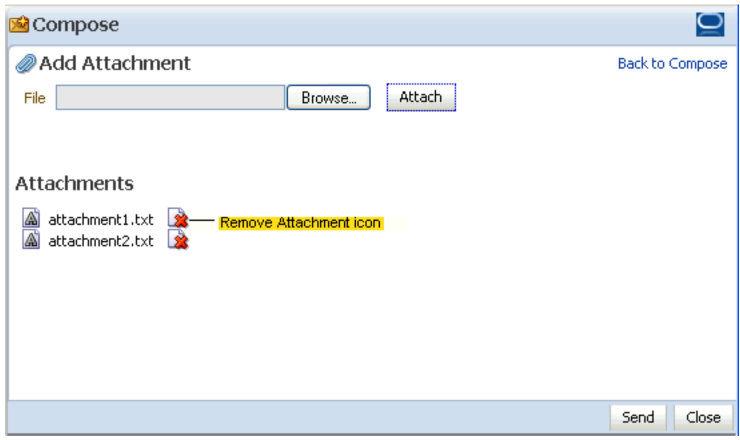
6. Click the **Back to Compose** link to go back to the Compose window.
7. Click the **Send** button.

23.3.8 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 23–20).

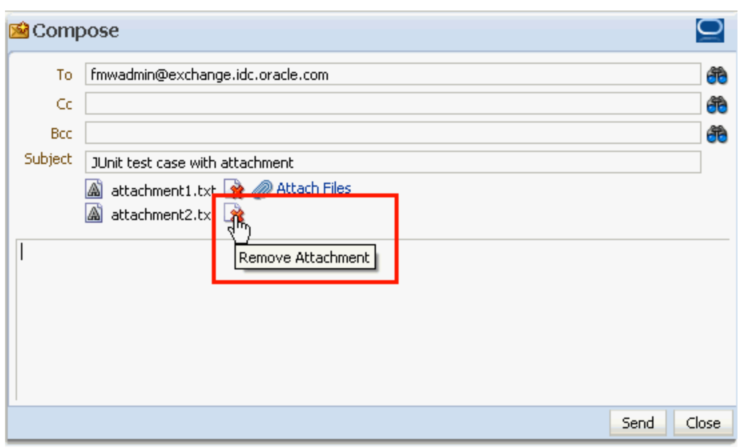
Figure 23–20 Attachments in the Add Attachment Window



  For information about accessing the **Add Attachment** window, see Section 23.3.7, "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 23–21).

Figure 23–21 Remove Attachment Icon in the Compose Window



  For information about accessing the **Compose** window, see Section 23.3.6, "Composing and Sending Mail Messages."

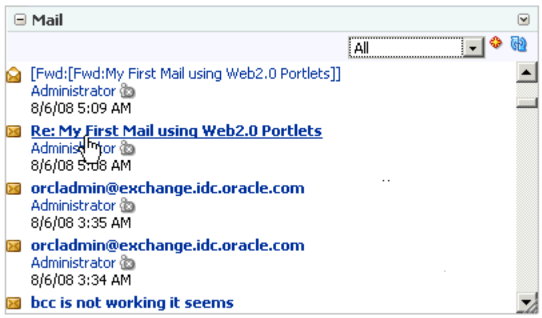
23.3.9 Replying to and Forwarding Mail

When you reply to or forward a mail, the mail content is sent as an attached HTML file instead of being displayed in the mail message window. Replying to and forwarding mail is as straightforward as in your regular mail application.

To reply to or forward a mail message:

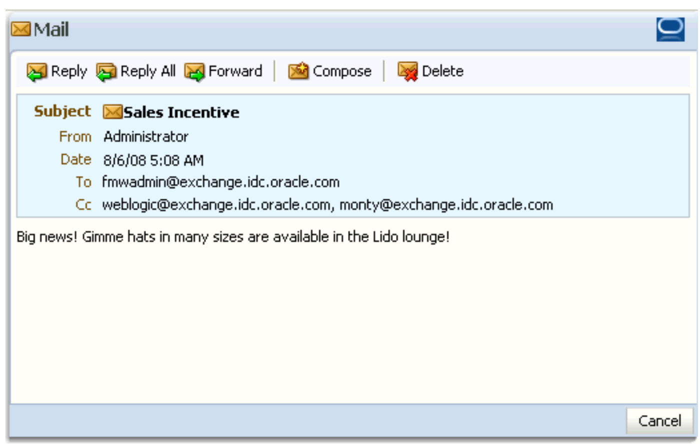
1. Go to a Mail task flow.
2. Click the link to the message you want to reply to or forward (Figure 23–22).

Figure 23–22 A Mail Message Link



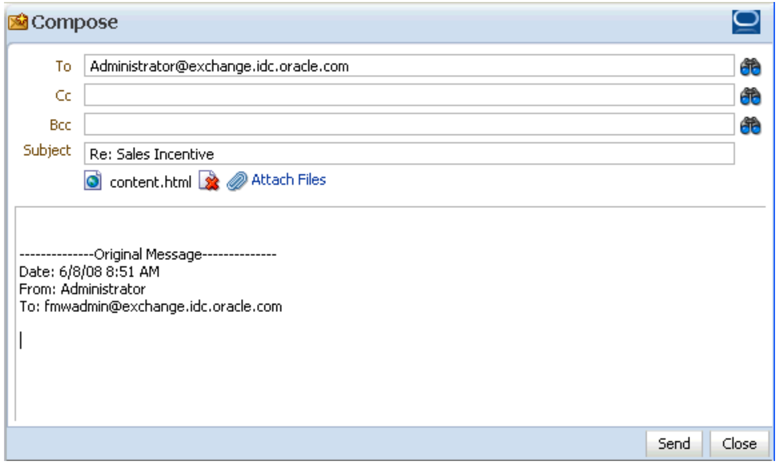
The message opens (Figure 23–23).

Figure 23–23 A Mail Message



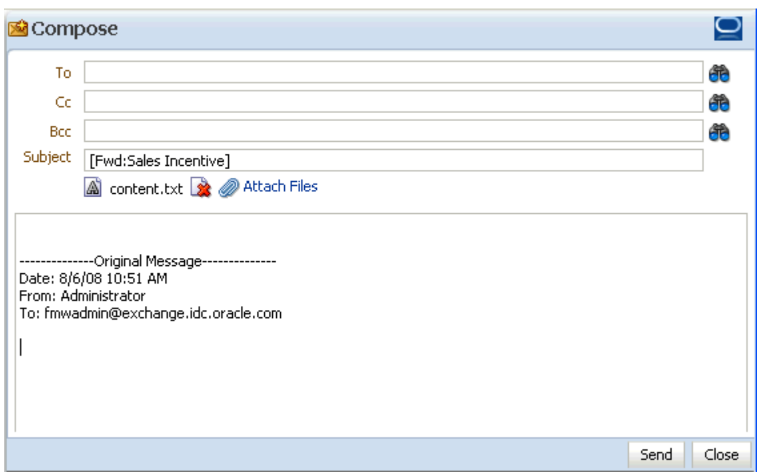
3. Select one from the following options:
   - Click the **Reply** button to reply to the sender. Figure 23–24 shows the resulting Mail window.

Figure 23–24 A Reply Mail Message Window



- Click the **Reply All** button to reply to all recipients (including users who received a blind copy).
- Click the **Forward** button to send the message on to a third party. Figure 23–25 shows the resulting window.

Figure 23–25 A Forwarded Mail Message Window



4. In the resulting **Compose** window, enter recipients in the **To**, **Cc**, and **Bcc** fields as you require.

   In a given field, separate multiple entries with a comma (,).

   The **Compose** window is directly connected to your mail server, so you can use the **Find User** icons, next to the **To**, **Cc**, and **Bcc** fields, to find mail addresses and contacts.

   Click the **Find User** icon and, in the resulting dialog, enter—minimally—the first two characters of the user name for which you are searching. Click the **Search** button, and all names matching your search criteria appear in the results area.

5. Optionally, revise the subject in the **Subject** field.
6. In the Mail's message area, enter your reply or any forwarding message before or after the original message.

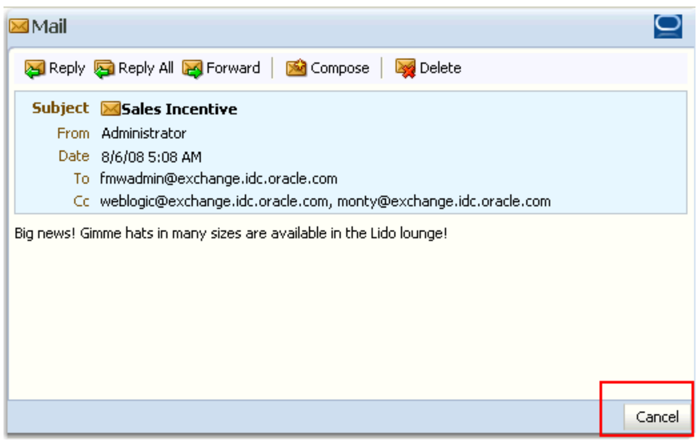
7. Optionally, add attachments as described in Section 23.3.7, "Sending Mail with Attachments."

8. Click **Send**.

   The message is sent, and the original message reappears.

9. Click the **Cancel** button at the bottom of the original message to close the window (Figure 23–26).

Figure 23–26 The Cancel Button



23.3.10 Refreshing Mail

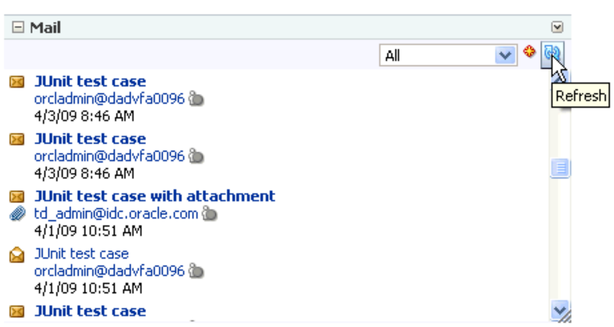
You must perform a refresh to check for new mail messages. Because the refresh operation triggers an event to the server to check for new mails, it may take a while to get new messages. Therefore, you may have to refresh a couple of times to display new mails in the Mail task flow.

To refresh Mail:

1. Go to the Mail task flow.

2. Click the **Refresh** icon (Figure 23–27) on the task flow.

Figure 23–27 The Refresh Icon on the Mail Task Flow



   The Mail task flow displays the latest mails.

23.3.11 Deleting Mail

You can easily remove a message from your inbox.

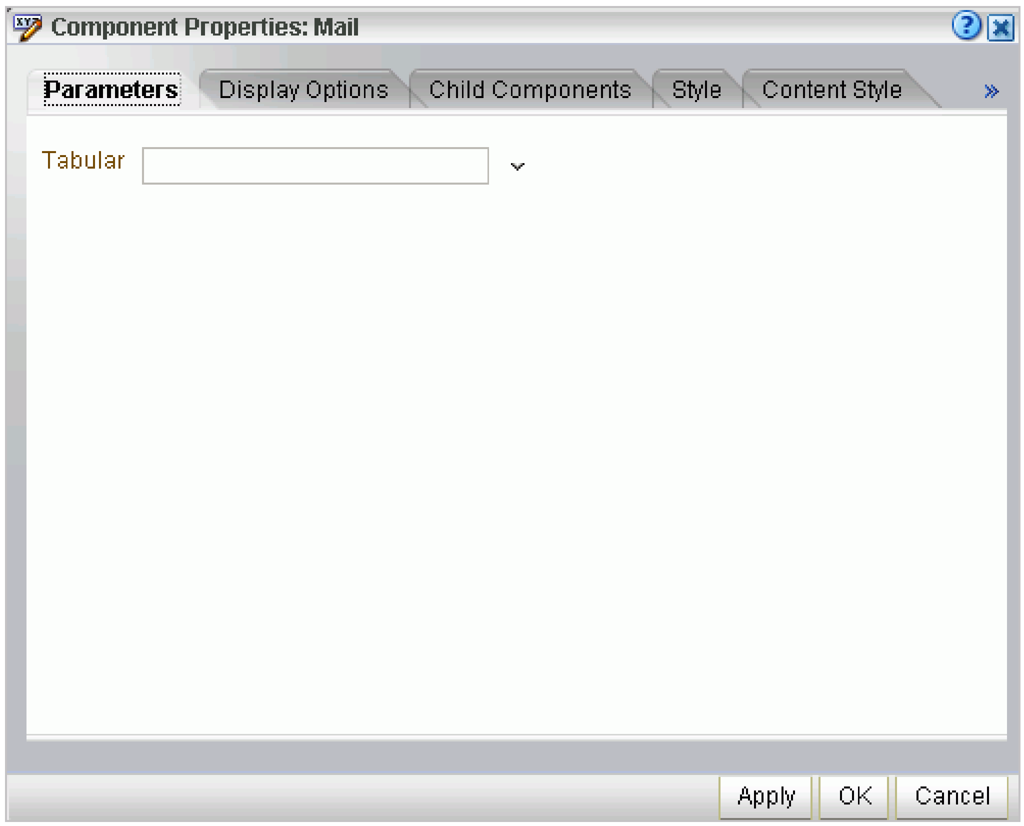
To delete a Mail message:

1. Open the message you want to delete as described in Section 23.3.4, "Opening Mail Messages."
2. Click the **Delete** button at the top of the message.

23.4 Setting Mail Service Task Flow Properties

The Mail service task flow has associated properties, which users with sufficient privileges can access from the Component Properties dialog in Oracle Composer (Figure 23–28). Many properties are common to all task flows, and the method for accessing task flow properties is the same from task flow to task flow. Common task flow properties and how to access them are discussed in Section 10.4, "Setting Properties on Page Content."

Figure 23–28 Mail Task Flow Component Properties



The properties on the **Parameters** tab of the Component Properties dialog control the default task flow content and facilitate the wiring of the task flow to page parameters and page definition variables. These properties are unique to the task flow type. For more information, see Section 10.4.3, "Working with Component Parameters." For information about wiring pages and components, see Chapter 11, "Wiring Pages, Task Flows, Portlets, and UI Components."

Changes to the properties on the **Display Options**, **Style**, and **Content Style** tabs affect the appearance and behavior of the task flow for all users. These properties are common to all task flows. For more information, see Section 10.4.4, "Working with Component Display Options" and Section 10.4.7, "Working with Style and Content Style Properties."

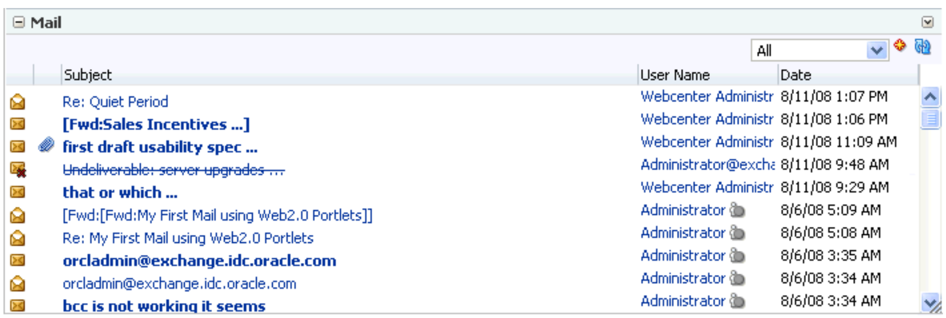
The content of the **Events** tab depends on the events supported by the task flow. For more information, see Section 10.4.8, "Working with Component Contextual Events."

The **Child Components** tab displays all of the components contained within the current component. It provides controls for rearranging, showing, and hiding child components. Not all components contain children. So you may find this tab devoid of content. For more information, see Section 10.4.6, "Working with Child Components."

All properties on the **Parameters** and **Display Options** tabs provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the **Edit** icon next to a property field to open the editor. For more information about using the editor and for descriptions of common EL expressions, see Section 10.4.5, "Using Expression Language (EL) Expressions with Component Properties."

The Mail task flow has one associated region parameter: `Tabular`. Using the EL value type, enter a value of `true` to display the information associated with a mail message, such as its subject, sender, and, date sent, in a tabular format. Figure 23–29 illustrates a tabular format Mail task flow.

Figure 23–29 A Mail Task Flow where the Region Parameter Tabular Is Set to True



24

Working with the Notes Service

This chapter describes the features and functions of the Notes service, and provides specific how-to information about creating personal notes.

Note: The Notes service is available only in the WebCenter Spaces application, not in custom WebCenter applications.

This chapter includes the following sections:

- Section 24.1, "What You Should Know About the Notes Service"
- Section 24.2, "Working with the Notes Service Task Flow"
- Section 24.3, "Setting Notes Service Task Flow Properties"

Audience

This chapter is intended for WebCenter Spaces users interested in creating personal notes within a WebCenter Spaces application.

The WebCenter Spaces application administrator has the authority to expose or hide a particular service's task flows. Tasks discussed in this chapter are not available to you if the relevant service is hidden.

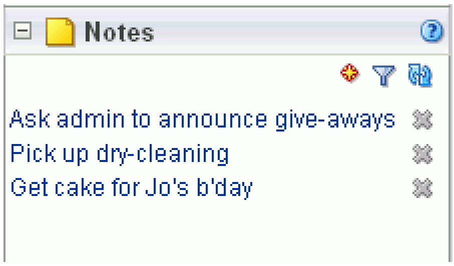
24.1 What You Should Know About the Notes Service

The Notes service provides useful features for writing yourself reminders in the form of personal notes. Only the notes you create are displayed in the Notes task flow. No other user sees your notes, and you do not see any other user's notes. As you move between spaces, the notes in your view of the Sidebar stay the same.

The Notes service provides two views:

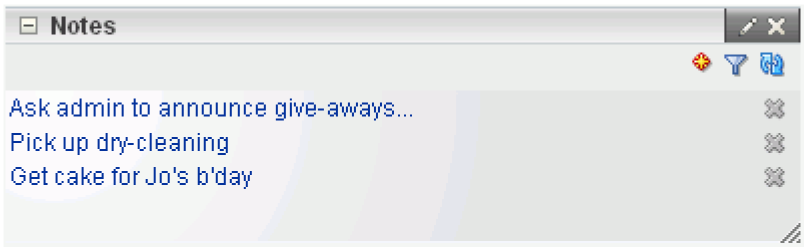
- The **Notes** panel in the Sidebar (Figure 24–1)

Figure 24–1 Notes Panel in the WebCenter Spaces Sidebar



- The Notes task flow, which you can add to pages (Figure 24–2)

Figure 24–2 A Notes Task Flow



If you add the Notes task flow to a page in a group space, the task flow displays the personal notes of the currently logged in user.

You can filter your Notes list by note titles. Filtering enables you to narrow the focus of your Notes to just the notes that match your filtering criteria. Consider devising a naming scheme for your notes to make the most of filtering.

24.2 Working with the Notes Service Task Flow

Every work day brings new things that you, and only you, must remember: I before E except after C. Use only bonded 25# paper for your report. John hides his candy in the coffee room stir-stick drawer. WebCenter Spaces offers a way for you to keep track of these useful, sometimes vital, bits of information through Notes.

This section describes how to use the Notes task flow. It contains the following subsections:

- Section 24.2.1, "Adding a Notes Service Task Flow to a Page"
- Section 24.2.2, "Creating a Note"
- Section 24.2.3, "Filtering and Clearing Filters on Notes"
- Section 24.2.4, "Editing Note Details"
- Section 24.2.5, "Refreshing Your View of Notes"
- Section 24.2.6, "Deleting Notes"

24.2.1 Adding a Notes Service Task Flow to a Page

For the steps to add a Notes service task flow to a page, see Section 10.1.4, "Adding Task Flows to a Page."

24.2.2 Creating a Note

Create notes to track personally relevant bits of information, such as your favorite route to the fifth floor, the place to find the most plentiful desk supplies, and so on. This section describes how to create a note.

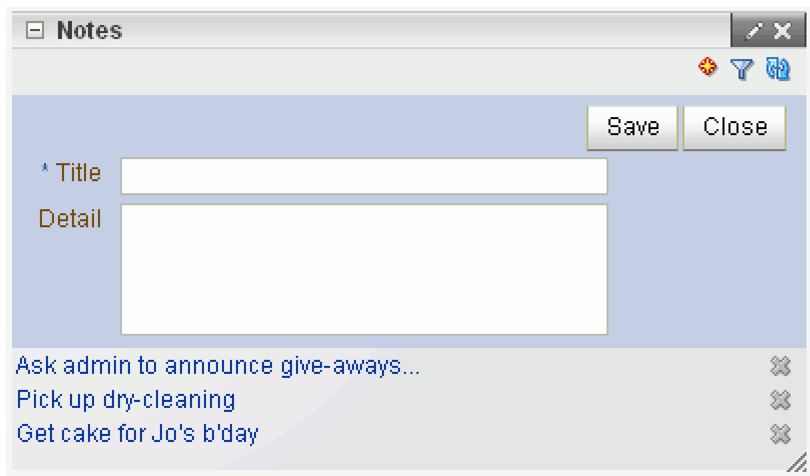
To create a note:

1. Go to a Notes task flow, and click the **Create a new note** icon (Figure 24–3).

Figure 24–3 Create a New Note Icon in a Notes Task Flow

A panel opens with fields for entering your note (Figure 24–4).

Figure 24–4 Panel for Creating a New Note



2. 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. For more information about filtering, see Section 24.2.3, "Filtering and Clearing Filters on Notes."

3. In the **Detail** field, enter note content.

4. Click the **Save** button to save the note.

   When you click **Save**, the detail panel remains open, allowing you to create additional notes. Once you finish, click **Close** to exit the panel.

24.2.3 Filtering and Clearing Filters on Notes

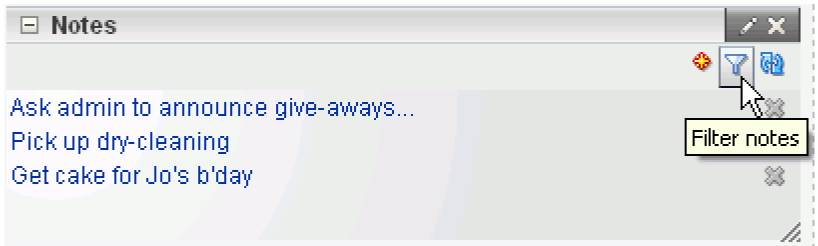
Your note list may become lengthy, making it a challenge to find a particular note. In a given session with the Notes task flow, you can shorten the list by filtering out all but the note titles that contain your filtering criteria. Enter a filtering value to temporarily limit display to notes that match the value. You can filter the Notes list against whole or partial words. Filtering looks for matches anywhere in the title.

To clear the filter, click the filtering icon again.

To filter notes:

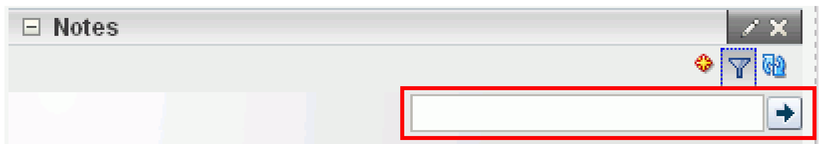
1. Go to a Notes task flow, and click the **Filter notes** icon (Figure 24–5).

Figure 24–5 The Filter Notes Icon



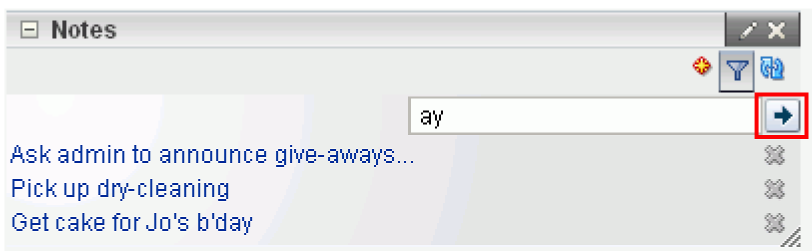
A filtering toolbar opens (Figure 24–6).

Figure 24–6 Filtering Toolbar



2. Enter your filtering term in the field provided, and then click the **Filter** icon, next to the field, to apply the filter (Figure 24–7).

Figure 24–7 The Filter Icon



Note: Filtering terms are not case sensitive. Use whole or partial words. Filtering looks for matches anywhere in the title.

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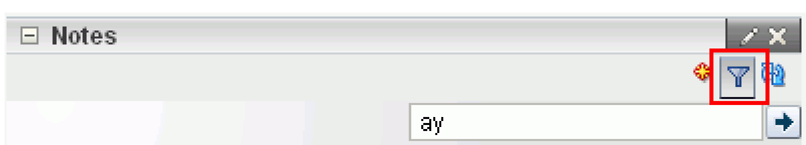
3. Click the **Cancel Filter** icon to remove the filter and display all notes (Figure 24–8).

Figure 24–8 The Cancel Filter Icon



24.2.4 Editing Note Details

Things change. This truism may apply to the details you have entered about a particular note. If so, it's an easy matter to revise note details. This section tells you how.

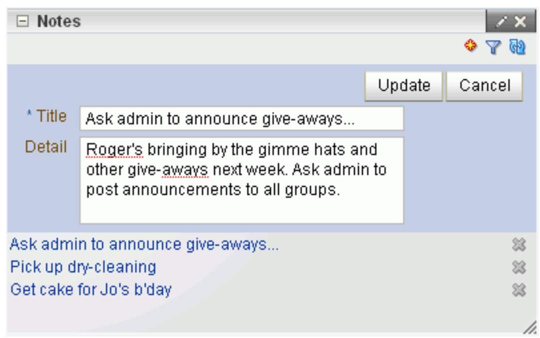
To edit note details:

1. Go to a Notes task flow, click a note title (Figure 24–9).

Figure 24–9 A Note Title in the Notes Task Flow

Note details display at the top of the task flow (Figure 24–10).

Figure 24–10 Note Details



2. Edit the details in the **Title** and **Detail** fields as you prefer.
3. Click the **Update** button to save your changes and exit the edit panel.

24.2.5 Refreshing Your View of Notes

The Notes task flow includes a **Refresh notes** icon that you can use to refresh your display of notes (Figure 24–11).

Figure 24–11 The Refresh Notes Icon on a Notes Task Flow

This comes in handy for updating your view of the task flow with any recent changes. Click the **Refresh notes** icon, and the Notes task flow redraws, reflecting recent changes.

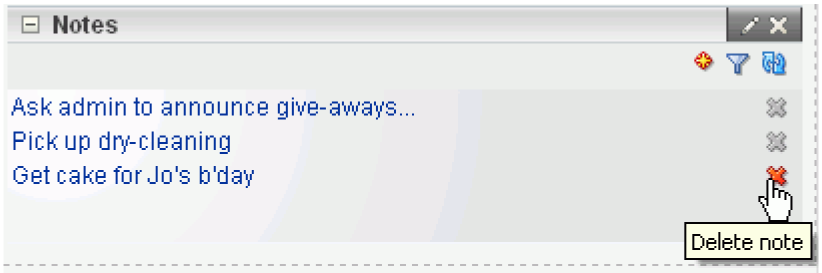
24.2.6 Deleting Notes

When a note has outlived its usefulness, you can remove it from the Notes task flow. Each note comes equipped with its own **Delete note** icon. This section describes how to delete a note.

To delete a note:

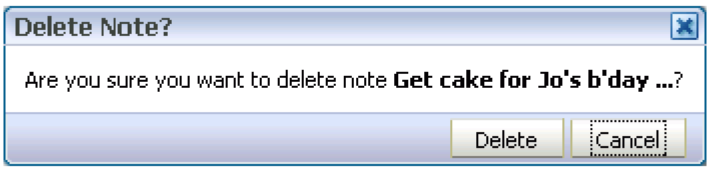
1. Go to a Notes task flow, and click the **Delete note** icon next to the note you want to delete (Figure 24–12).

Figure 24–12 Delete Note Icon



A Delete Note dialog opens (Figure 24–13).

Figure 24–13 Delete Note Dialog

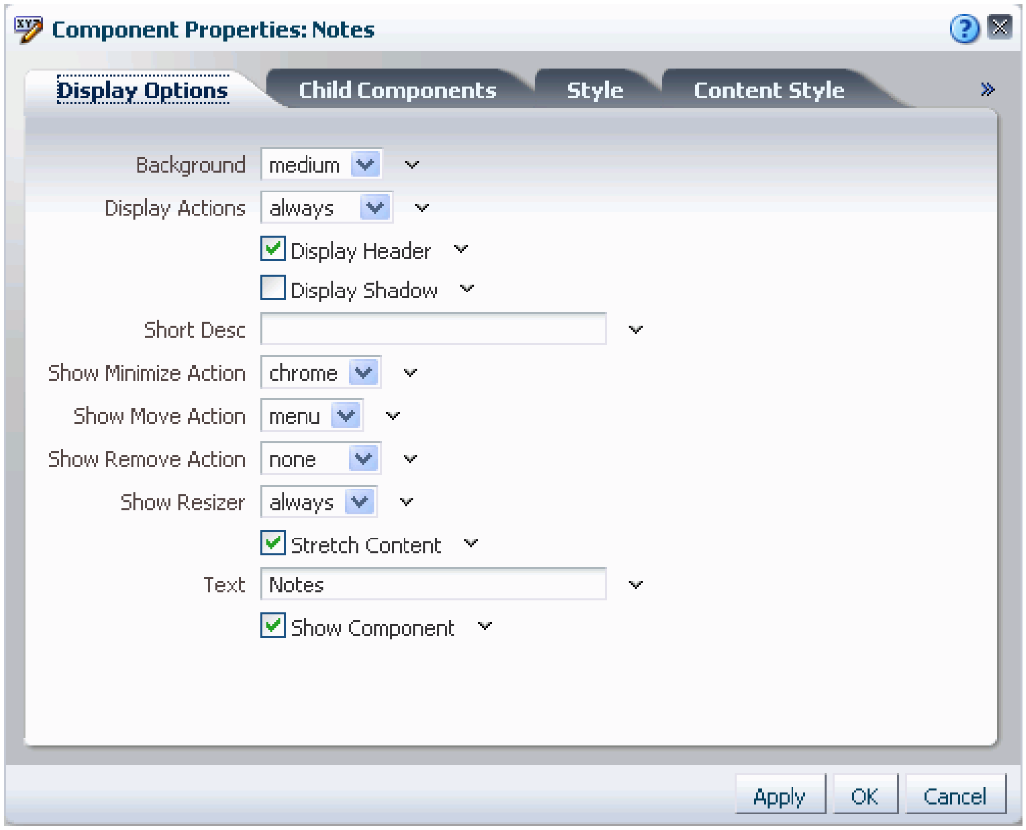


2. Click the **Delete** button to delete the selected note.

24.3 Setting Notes Service Task Flow Properties

The Notes service task flow has associated properties, which users with sufficient privileges can access through the Component Properties dialog in Oracle Composer (Figure 24–14). Many properties are common to all task flows, and the method for accessing task flow properties is the same from task flow to task flow. Common task flow properties and how to access them are discussed in Section 10.4, "Setting Properties on Page Content."

Figure 24–14 Notes Service Task Flow Component Properties



The Notes service task flow does not have any unique properties, and therefore no **Parameters** tab in the Component Properties dialog.

Changes to the properties on the **Display Options**, **Style**, and **Content Style** tabs affect the appearance and behavior of the task flow for all users. These properties are common to all task flows. For more information, see Section 10.4.4, "Working with Component Display Options" and Section 10.4.7, "Working with Style and Content Style Properties."

The content of the **Events** tab depends on the events supported by the task flow. For more information, see Section 10.4.8, "Working with Component Contextual Events."

The **Child Components** tab displays all of the components contained within the current component. It provides controls for rearranging, showing, and hiding child components. Not all components contain children. So you may find this tab devoid of content. For more information, see Section 10.4.6, "Working with Child Components."

All properties on the **Display Options** tab provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the **Edit** icon next to a property field to open the editor. For more information about using the editor and for descriptions of common EL expressions, see Section 10.4.5, "Using Expression Language (EL) Expressions with Component Properties."

Part V

Services P Through W

Part V of this guide provides information about Oracle WebCenter Services (P through W). It provides an overview of each service and describes how to use service task flows and how to configure task flow properties. It and contains the following chapters:

25 Working with the People Connections Service

The People Connections service provides a rich set of social networking tools for creating a personal profile and connecting with other users. People Connections exposes these features through task flows that assist you in viewing user profiles, adding and maintaining personal connections, viewing application activities, viewing and posting messages, and providing feedback to your connections.

This chapter discusses the People Connections service and provides information about its task flows. It contains the following sections:

- Section 25.1, "What You Should Know About the People Connections Service"
- Section 25.2, "Working with People Connections Service Task Flows"
- Section 25.3, "Setting People Connections Service Task Flow Properties"

Audience

This chapter is for users who want to leverage social networking services, such as connections and profiles, to work collaboratively within the WebCenter Spaces environment.

Much of this information also applies to custom WebCenter applications, though it is written with WebCenter Spaces users in mind. (For information about the People Connections service in custom WebCenter applications, see the chapter "Integrating the People Connections Service" in *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter*.)

Your application administrator has the authority to expose or hide a particular service's task flows. Tasks discussed in this chapter are not available to you if the relevant service is hidden.

25.1 What You Should Know About the People Connections Service

The People Connections service exposes its features in main views and quick views. The main views include available information for a given feature. The quick views provide a summary view of available information. You can use Preferences settings to determine the type of information that is shown and control other users' access to your views.

> **See Also:** For more information about People Connections Preferences, see Section 3.8, "Setting People Connections Preferences."

People Connections configuration settings are exposed at the administrative level—which affects People Connections application-wide; at the individual user level—through Preferences; and at the task flow instance level, through customization and personalization settings on the specific instance. All of these levels of configuration are subject to an order of precedence:

- Administrative settings affect all users' views of People Connections features.
- Preferences settings affect the view of the user who set them, and they override administrative settings.
- Settings on a particular task flow affect just that task flow instance, and they override Preference settings:
  - Values set in page edit mode (customization) affect all users' views of that task flow instance.
  - Values set in page view mode (personalization) affect only that user's view of that task flow instance, and they override task flow customizations.

> **See Also:** For information about setting application-wide preferences for the People Connections service, see "Managing the People Connections Service," in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter*.

Once you place a People Connections task flow onto a page, you can use its properties to control the appearance and behavior of that particular task flow instance. For example, use task flow properties to specify how much information to show, whether the instance has a header or a footer, your preferred layout style, and the like. For more information, see Section 25.3, "Setting People Connections Service Task Flow Properties."

People Connections features fall into five groups. These are discussed in the following subsections:

- Section 25.1.1, "What You Should Know About Profile"
- Section 25.1.2, "What You Should Know About Connections"
- Section 25.1.3, "What You Should Know About Feedback"
- Section 25.1.4, "What You Should Know About Message Board"
- Section 25.1.5, "What You Should Know About Activity Stream"

25.1.1 What You Should Know About Profile

The Profile feature provides a variety of views into your own and other users' personal profile information. Such information can include your mail address, phone number, office location, department, manager, direct reports, and so on. Profile takes the bulk of its information from the back-end identity store that provides your WebCenter application with its users. Additionally, Profile may offer opportunities for altering some of this information and for providing additional data not included in the identity store.

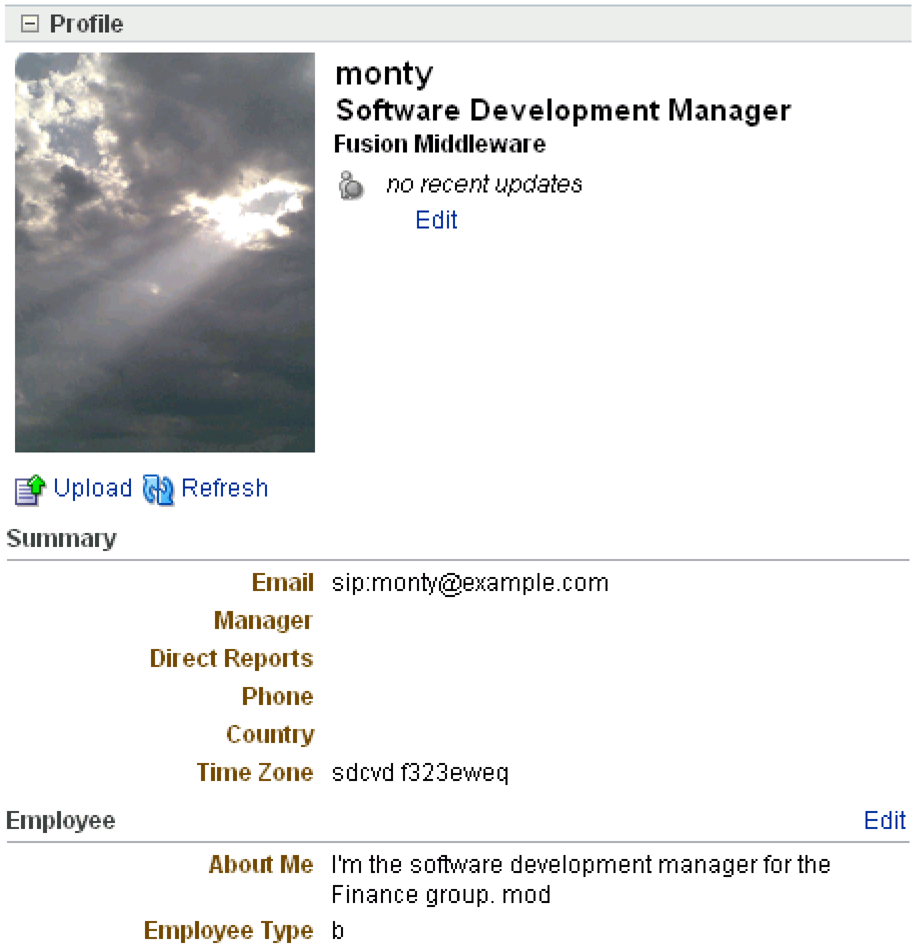
When you connect with other users, you give them access to your Profile, and gain access to theirs. You can control how much of your Profile a connection can view through People Connections Preferences.

> **See Also:** For information about setting your Profile Preferences, see Section 3.8.3, "Setting Profile Preferences."

WebCenter Spaces provides five Profile task flows:

- **Profile** for displaying a user's profile details and uploading a photo (Figure 25–1)

Figure 25–1 Profile Task Flow

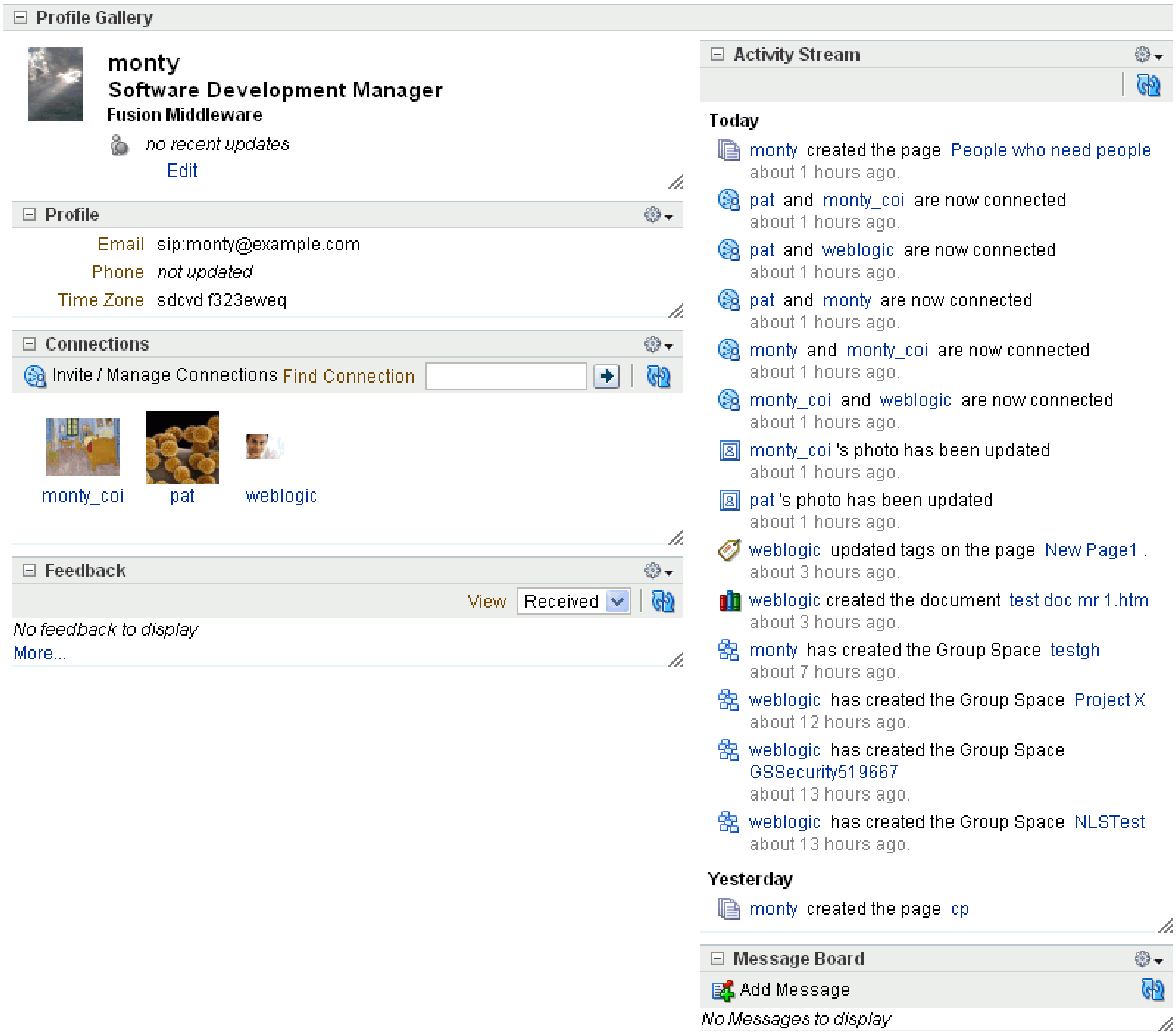


- **Profile - Actions** for accessing quick links to actions associated with contacting another user (Figure 25–2).

Figure 25–2 Profile - Actions Task Flow

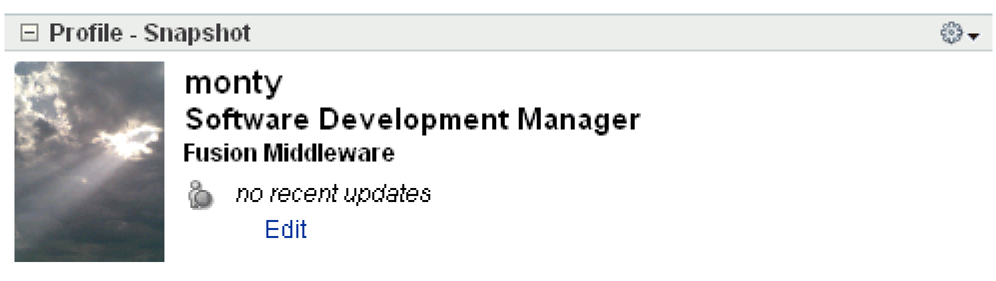
- **Profile Gallery** for accessing all of your social networking information from one view (Figure 25–3)

Figure 25–3 Profile Gallery Task Flow



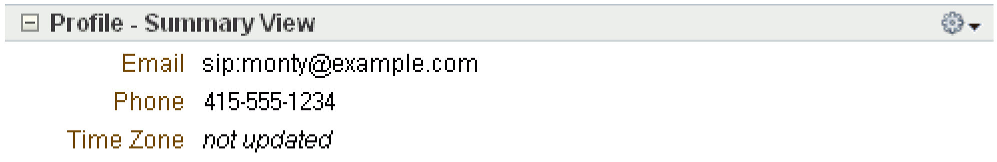
- **Profile - Snapshot** for viewing a user photo and status message (Figure 25–4)

Figure 25–4 Profile - Snapshot Task Flow



- **Profile - Summary View** for a summary of user contact information (Figure 25–5).

Figure 25–5 Profile - Summary View Task Flow



For information about using Profile features, see Section 25.2.2, "Working with Profile Task Flows."

25.1.2 What You Should Know About Connections

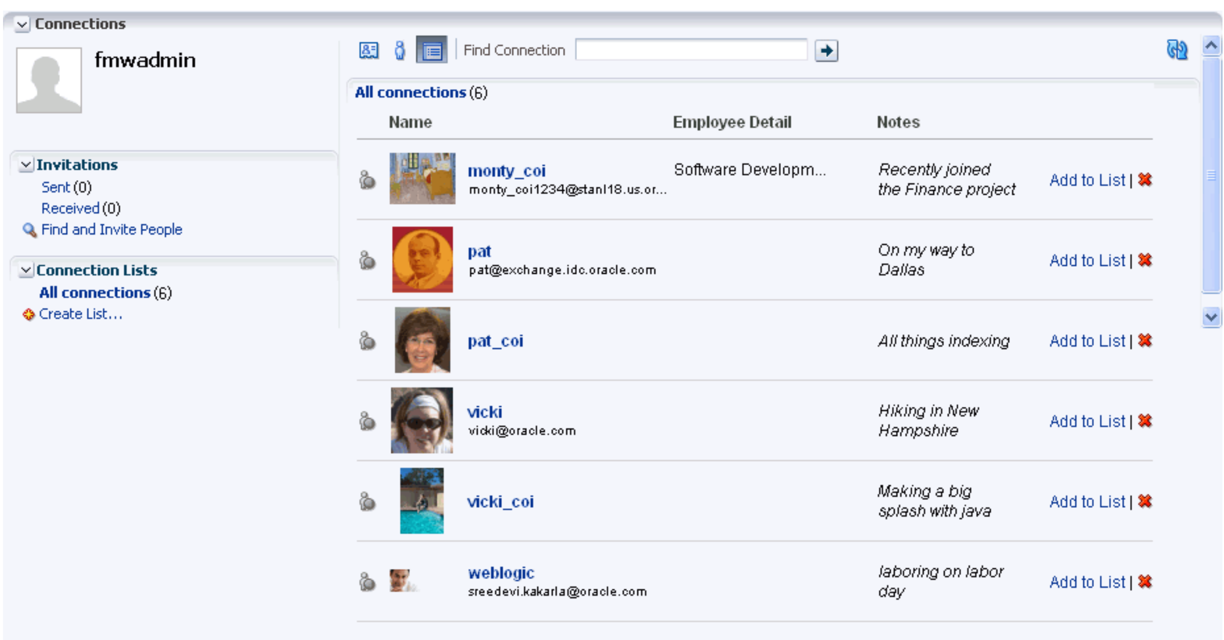
The Connections feature provides a means of collecting your business friends and contacts into a social network and tools for managing your own connections and viewing the connections of others. Using People Connections Preferences, you can grant differing levels of access to those who are and are not your connections. For example, you can enable your connections to offer Feedback and those who are not your connections only to view it.

Note: For information about setting your People Connections Preferences, see Section 3.8, "Setting People Connections Preferences."

WebCenter Spaces provides three Connections task flows:

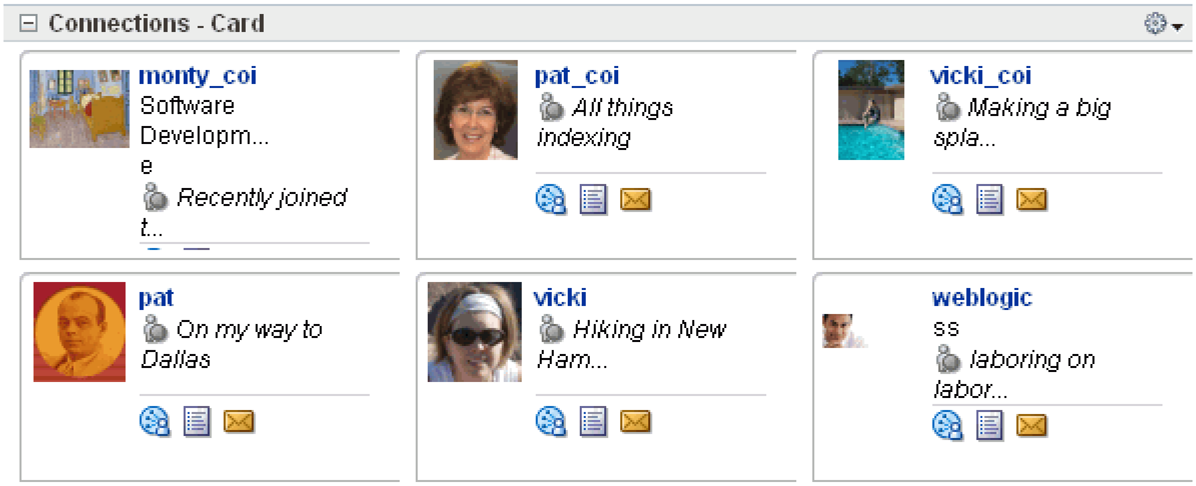
- **Connections** for viewing and managing your connections, creating connections lists, and sending and responding to invitations to connect (Figure 25–6)

Figure 25–6 Connections Task Flow in List View



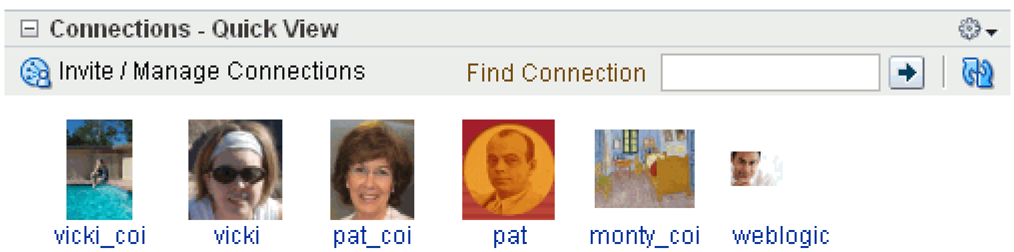
- **Connections - Card** for photos, status messages, and instant contact options to your connections (Figure 25–7)

Figure 25–7 Connections - Card Task Flow



- **Connections - Quick View** for photos and quick access to your connections (Figure 25–8)

Figure 25–8 Connections - Quick View Task Flow



The Connections - Quick View task flow includes an **Invite/Manage Connections** button for navigating to the main Connections page where you can invite and manage your connections.

For information about using Connections features, see Section 25.2.3, "Working with Connections Task Flows."

25.1.3 What You Should Know About Feedback

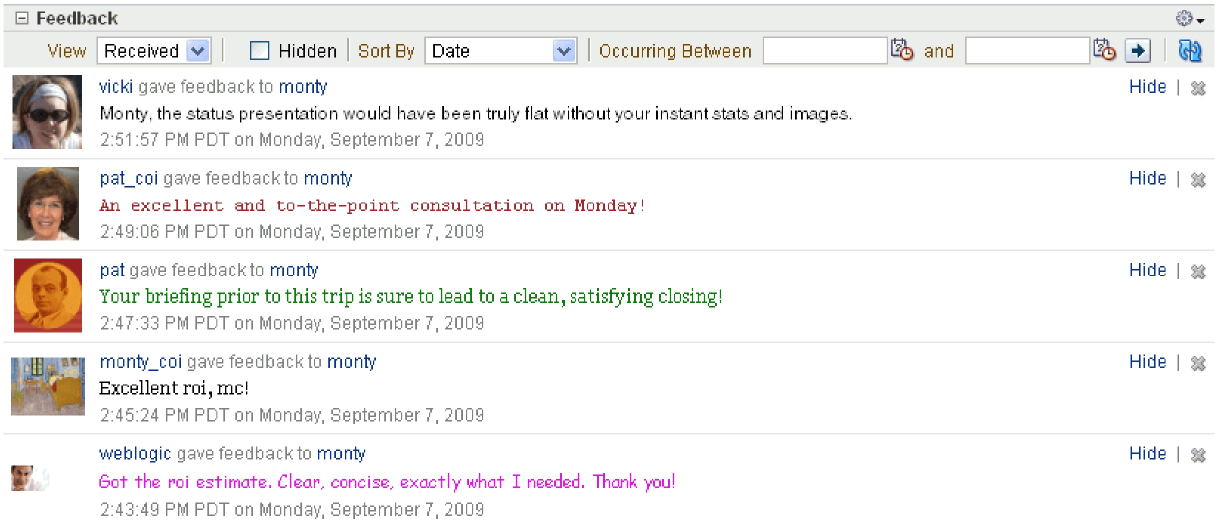
The Feedback feature provides a means of viewing, posting, and managing feedback. By default, you can view feedback in your own Feedback view. You can view and post feedback in other users' Feedback views—provided they have granted you access.

Note: You can grant access to your Feedback through Preferences. For more information, see Section 3.8.5, "Setting Feedback Preferences."

WebCenter Spaces provides two Feedback task flows:

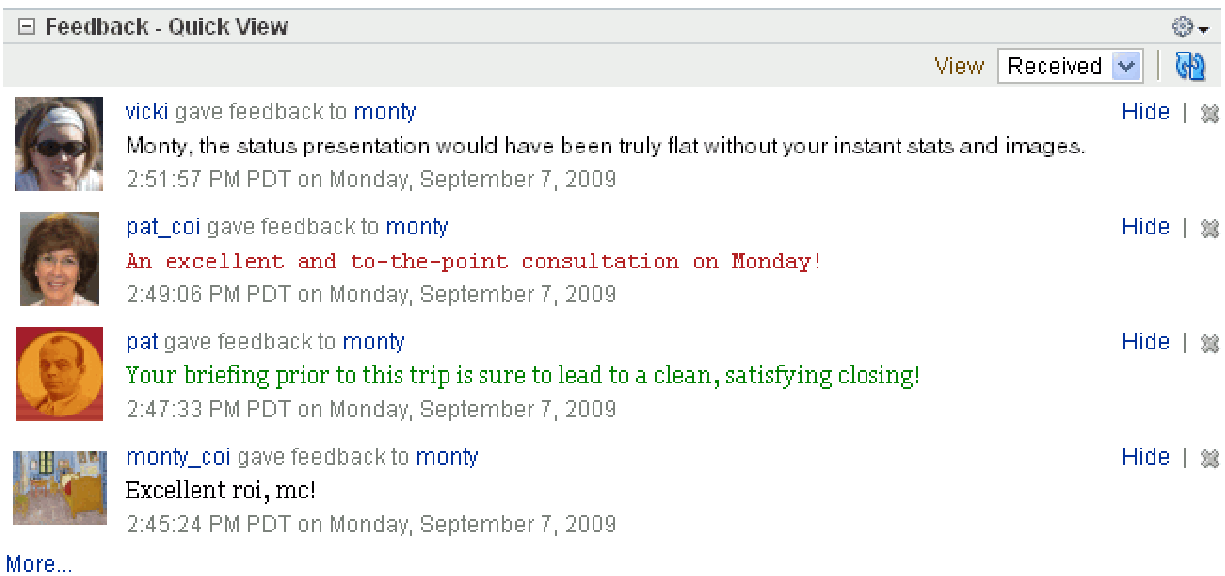
- **Feedback** for viewing, posting, and managing feedback (Figure 25–9)

Figure 25–9 Feedback Task Flow



- **Feedback - Quick View** for viewing and posting feedback (Figure 25–10)

Figure 25–10 Feedback - Quick View Task Flow



For information about using Feedback features, see Section 25.2.4, "Working with Feedback Task Flows."

25.1.4 What You Should Know About Message Board

The Message Board feature provides a means of viewing and posting messages. By default, in your personal space you can view and post messages in your own Message Board. You can view and post messages on other users' Message Boards, provided they have granted you access to them.

Note: You can grant access to your Message Board through People Connections Preferences. For more information, see Section 3.8.4, "Setting Message Board Preferences."

In a group space, the Message Board feature provides a means of viewing and posting messages within the scope of the group space. Every instance of a Message Board task flow shows the same content: messages left by authorized users who are members of the group space. The group space Message Board leverages Page service permissions as its permission model.

The following table illustrates who can do what for the group space Message Board.

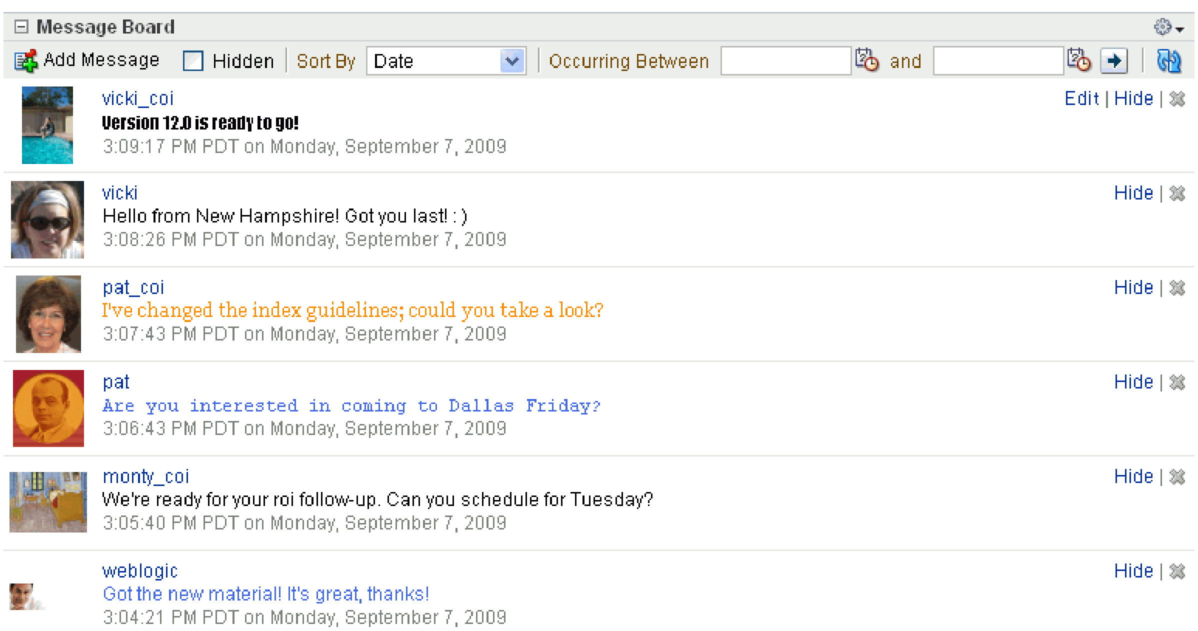
Table 25–1 Page Permissions for Viewing, Posting, and Managing a Group Space Message Board

Page Permission	Post	View	Update	Delete
View Page	No	Yes	No	No
Personalize Page	Yes	Yes	Yes for messages posted by this user	Yes for messages posted by this user
Perform All Page Actions	Yes	Yes	Yes for all messages	Yes for all messages

WebCenter Spaces provides two Message Board task flows:

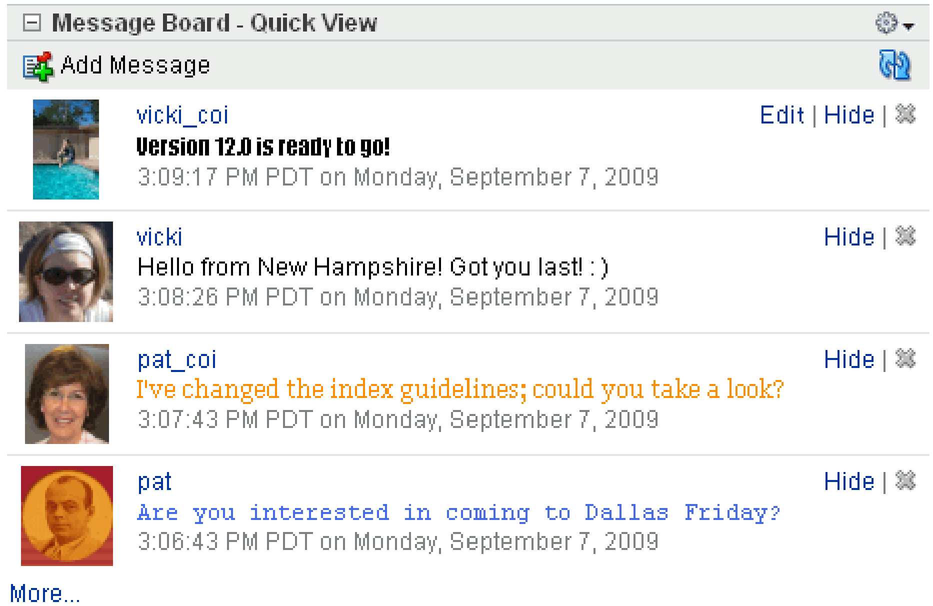
- **Message Board** for adding, updating, hiding, deleting, and managing your view of messages (Figure 25–11)

Figure 25–11 Message Board Task Flow



- **Message Board - Quick View** for adding, viewing, hiding, and deleting messages (Figure 25–12)

Figure 25–12 Message Board - Quick View Task Flow



For information about Message Board features, see Section 25.2.5, "Working with Message Board Task Flows."

25.1.5 What You Should Know About Activity Stream

The Activity Stream feature can track and report on all the application activity of you and your connections for the services you specify in your personal space and the group spaces to which you belong. For example, Activity Stream can note when you or a connection posts feedback, uploads a document, and creates a discussion forum.

Table 25–2 lists and describes the types of activities that can be reported through Activity Stream.

Table 25–2 Activities Tracked by Activity Stream

Service	Tracked Activities	Scope	Activities Shared or Private
Announcements	■ Create announcement ■ Edit announcement ■ Delete announcement	Group space	Shared with other group space members
Discussions	■ Create forum ■ Delete forum ■ Create topic ■ Delete topic ■ Reply to topic ■ Delete reply	Group space	Shared with other group space members
Documents	■ Create document ■ Edit document ■ Delete document ■ Add tag ■ Remove tag	■ Group space ■ Personal space	■ Activities on group space documents are shared with other group space members. ■ Activities on personal space documents are private to user. ■ Activities on public page documents are shared with all users.
Group Space Event	■ Create an event ■ Edit an Event ■ Delete an event	Group space	Shared with other group space members
Group Spaces Management	■ Create group space ■ Join group space ■ Delete group space	Group space	Shared with other group space members
Lists	■ Create a list ■ Add a row to a list ■ Edit a list row ■ Delete a list	Group space	Shared with other group space members
Page	■ Create page ■ Edit page ■ Delete page ■ Add tag ■ Remove tag	■ Group space ■ Personal space	■ Activities on group space pages are shared with other group space members. ■ Activities on personal space pages are private to user. ■ Activities on public pages are shared with all users.

Table 25–2 (Cont.) Activities Tracked by Activity Stream

Service	Tracked Activities	Scope	Activities Shared or Private
People Connections	■ People are connected ■ Message Board post ■ Feedback post ■ Photo updated ■ Profile updated ■ Personal status note updated ■ Add tag to People Connections pages ■ Remove tag from People Connections pages	Personal space	Shared with whomever is permitted to view such activities (for more information, see Chapter 3, "Setting Your Personal Preferences." and the section, "Configuring the People Connections Service in WebCenter Spaces" in the *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter*)
Tagging	■ Add tag ■ Remove tag	Group space	■ Activities in a group space are shared with all group space members. ■ Activities in a personal space are shared with whomever is permitted to view such activities (for more information, see Chapter 3, "Setting Your Personal Preferences." and the section, "Configuring the People Connections Service in WebCenter Spaces" in the *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter*)
Wiki and Blog	■ Create wiki ■ Edit wiki ■ Add wiki comment ■ Delete wiki ■ Create blog entry ■ Edit blog entry ■ Add blog entry comment ■ Delete blog entry	■ Group space ■ Personal space	■ Activities in a group space are shared with all group space members. ■ Activities in a personal space are shared with whomever is permitted to view such activities (for more information, see Chapter 3, "Setting Your Personal Preferences." and the section, "Configuring the People Connections Service in WebCenter Spaces" in the *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter*)

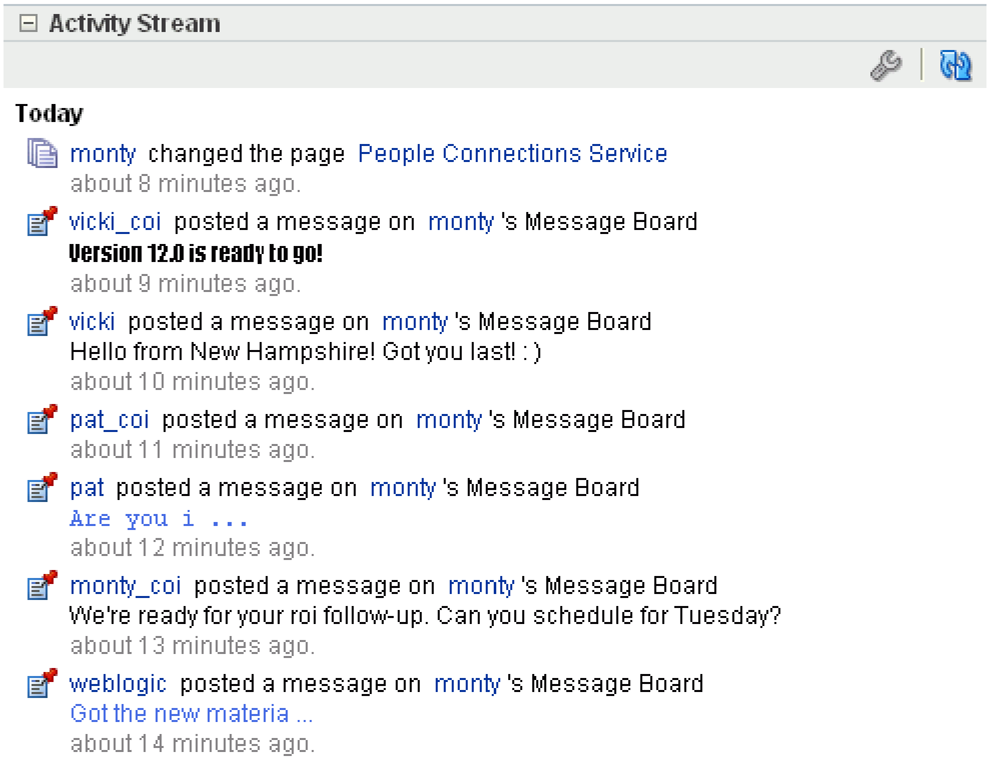
Use Activity Stream Preferences to specify who can view your Activity Stream details and which activities to show.

> **See Also:** For more information about Preferences relating to Activity Stream task flows, see Section 3.8.1, "Setting Activity Stream Preferences."

WebCenter Spaces provides one Activity Stream task flow:

- **Activity Stream** for viewing application activities and the activities of your connections (Figure 25–13)

Figure 25–13 Activity Stream Task Flow



Clicking an object in an Activity Stream opens the object. For example, clicking the name of a newly created document in an Activity Stream opens the document. Additionally, clicking a user name in an Activity Stream opens a user profile pop-up.

For more information, see Section 25.2.6, "Working with the Activity Stream Task Flow."

25.2 Working with People Connections Service Task Flows

This section provides details about using the features offered through the People Connections task flows. It contains the following subsections:

- Section 25.2.1, "Adding a People Connections Service Task Flow to a Page"
- Section 25.2.2, "Working with Profile Task Flows"
- Section 25.2.3, "Working with Connections Task Flows"
- Section 25.2.4, "Working with Feedback Task Flows"
- Section 25.2.5, "Working with Message Board Task Flows"
- Section 25.2.6, "Working with the Activity Stream Task Flow"

25.2.1 Adding a People Connections Service Task Flow to a Page

For the steps to add a People Connections service task flow to a page, see Section 10.1.4, "Adding Task Flows to a Page."

25.2.2 Working with Profile Task Flows

Profile task flows provide quick access to contact and status information about you and your connections. Additionally, they offer a means of making instant contact with your connections and uploading a picture to include with your personal profile.

Note: The level of access you have to a profile is determined by the People Connections defaults set by the application administrator and a given connection's People Connections Preference settings.

For information about People Connections Preferences, see Chapter 3, "Setting Your Personal Preferences." For information about People Connections defaults set by the application administrator, see the chapter, "Managing the People Connections Service," in the *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter*.

This section describes how to use the features offered through Profile task flows. It contains the following subsections:

- Section 25.2.2.1, "Viewing Profile Details"
- Section 25.2.2.2, "Setting Your Personal Status Note"
- Section 25.2.2.3, "Uploading and Updating a Personal Profile Picture"
- Section 25.2.2.4, "Editing Your Personal Profile"

See Also: Advanced users can extend WebCenter Spaces by customizing user Profile attributes. For more information, see the white paper, "*Extending WebCenter Spaces (11.1.1.2.0)*" on the Oracle Technology Network: http://www.oracle.com/technology/products/webcenter/white_papers.html.

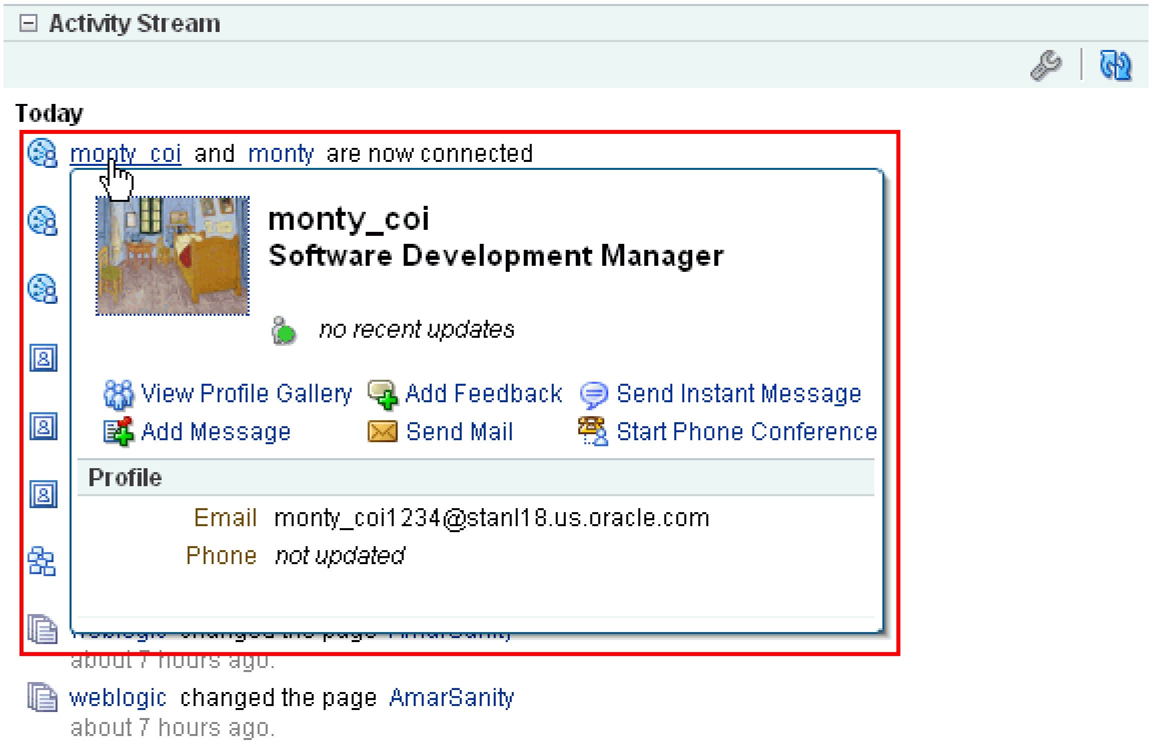
25.2.2.1 Viewing Profile Details

You can view your full profile details by clicking your user name at the top of the application (Figure 25–14) and then, on the resulting page, clicking the **Profile** tab to bring it forward.

Figure 25–14 User Name at Top of Application

You can view summary profile details for yourself and all of your connections simply by clicking a name wherever it appears in any People Connections task flow. Clicking a name opens a Profile dialog (Figure 25–15).

Figure 25–15 Profile Dialog

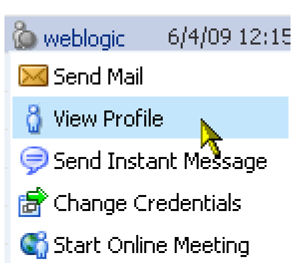


Click the **View Profile Gallery** link in the dialog to access your connection's Profile Gallery.

This dialog also opens when you click a user name in Search results, in Buddies and Members task flows, and on the **Members** tab of a group space **Settings** page.

Where user names appear in the application in places other than those mentioned, you can access a user's profile by clicking the user name and selecting **View Profile** from the resulting context menu (Figure 25–16).

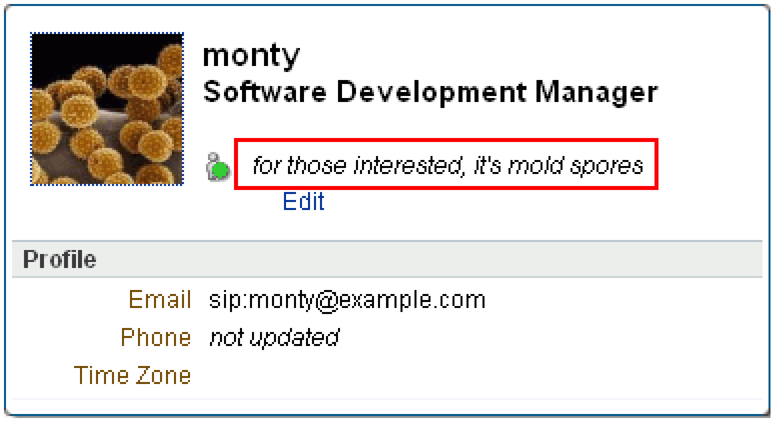
Figure 25–16 View Profile Option on the Presence Context Menu



25.2.2.2 Setting Your Personal Status Note

Your personal status note is a type of flag that alerts your connections, and any other users you have enabled to view your profile, to your current activities, state of mind, availability, and the like (Figure 25–17).

Figure 25–17 A Personal Status Message



Anywhere you see an **Edit** link under your personal status message, you can revise its content.

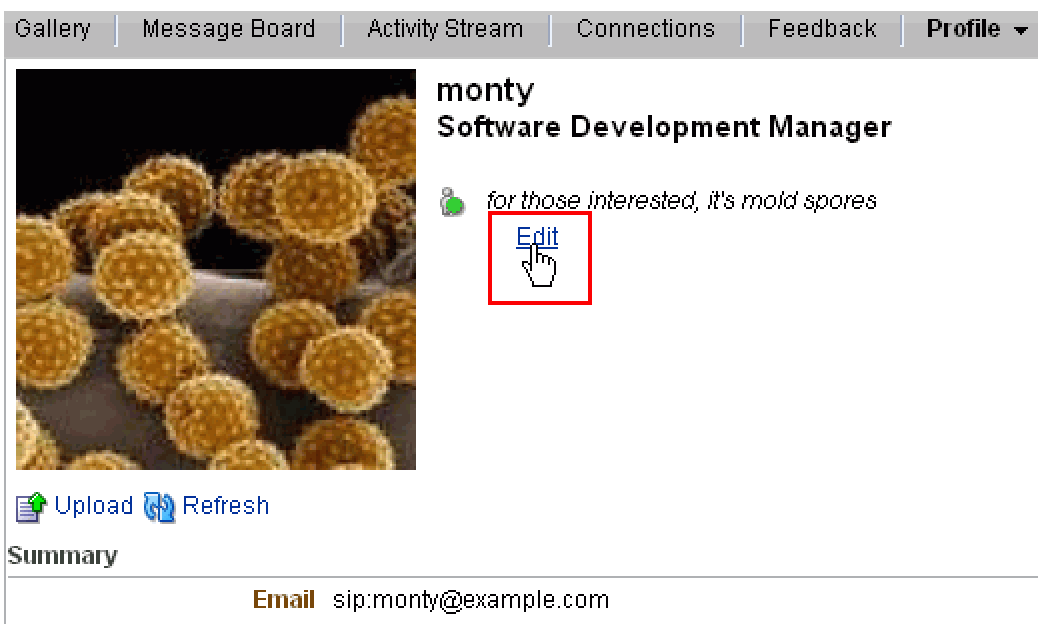
To revise a personal status message:

1. Log in, and click your user name at the top of the application, and then click the **Profile** tab to bring it forward.

   Tip: You can also edit your personal status message from the Profile Gallery, which is the default page that opens when you click your user name at the top of the application.

2. Click the **Edit** link under your personal status message (Figure 25–18).

Figure 25–18 Edit Icon Under Profile Status Message



3. In the resulting field, revise your personal status message, and click **Done**.

25.2.2.3 Uploading and Updating a Personal Profile Picture

Any user with a personal profile can upload an image file to his or her own profile, or update an existing image. This section describes how.

Note: The file must have the mime-type *image*, and cannot have the extension `*.ico`.

To upload or update your profile image:

1. Log in, and click your user name at the top of the application (Figure 25–19).

Figure 25–19 User Name at Top of Application

2. On the resulting page, click the **Profile** tab to bring it forward.
3. Click the **Upload** link (Figure 25–20) to open the Upload Photo dialog (Figure 25–21).

Figure 25–20 An Upload Link on a Personal Profile Page

Figure 25–21 Upload Photo Dialog

4. Click the **Browse** button to locate and select a photo.
5. Click **OK** to complete the upload.

When you update your profile photo, additional dialogs may come into play. When you click the **Upload** link, the Upload Photo dialog opens, displaying the name of the current file along with an **Update** button (Figure 25–22).

Figure 25–22 Update Button in an Upload Photo Dialog

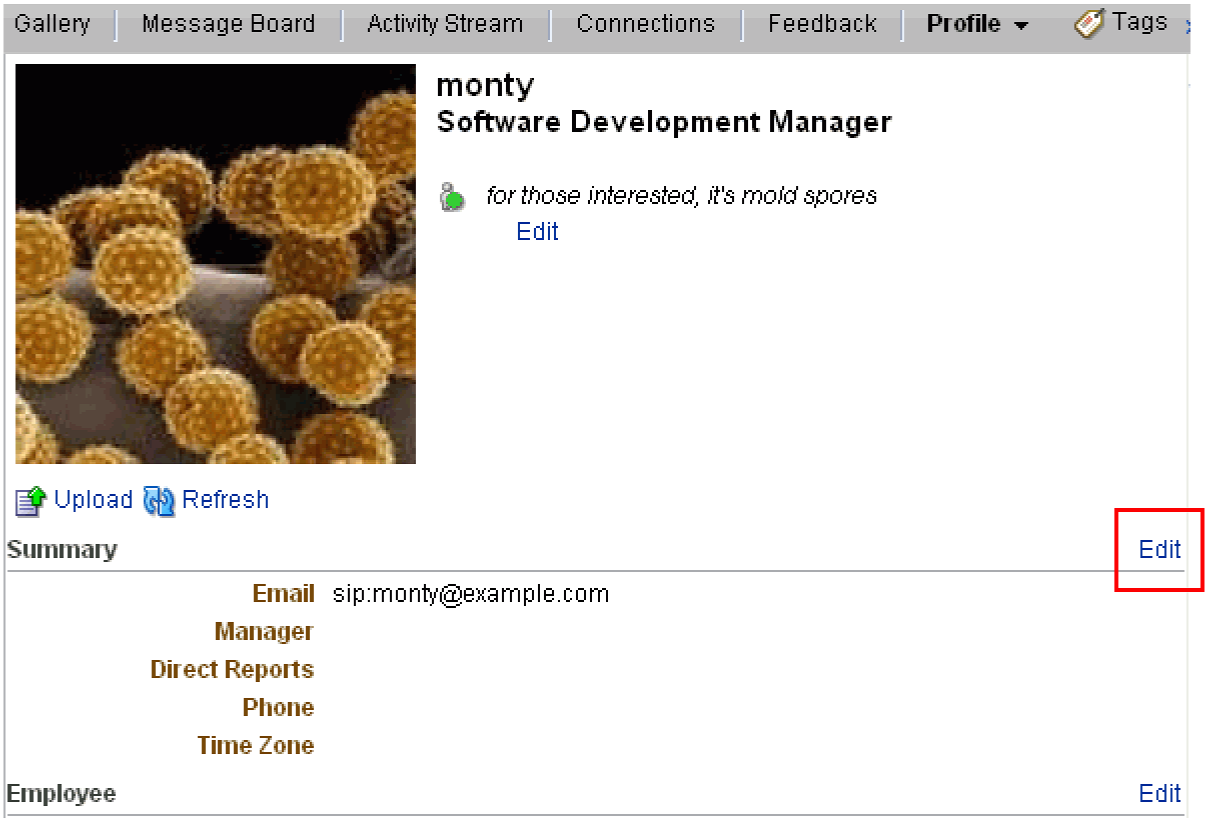
Click **Update** to open the Upload Photo dialog depicted in Step 3. Follow Steps 4 and 5, and then click **OK** in the Upload Photo (Update) dialog.

Note: If your new image does not display immediately, click the **Refresh** icon under the stale image. The new image will appear.

25.2.2.4 Editing Your Personal Profile

Your application administrator has discretion over how much of your personal profile you may revise (for more information, see the section, "Configuring Profiles," in the *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter*). Wherever you have permission to revise a profile section, an **Edit** link displays to the right of the section name (Figure 25–23).

Figure 25–23 Edit Link on a Personal Profile (In This Example, Only Employee Section Is Editable)



Click this link to open an edit view of your personal profile.

Note: Even when your application administrator has enabled the editing of a particular section, all fields in that section may not be editable.

To edit your personal profile:

1. Log in, and open your personal profile.
2. Click the **Edit** link to the right of the profile section you want to revise (see Figure 25–23).
3. Make your changes, and click **Save**.

25.2.3 Working with Connections Task Flows

Connections provides the core features for building and visualizing your social network. Use Connections task flows to invite other users to connect, to accept connection invitations, to create connections lists, and to remove obsolete connections.

Note: The level of access you have to a connection is determined by the People Connections defaults set by the application administrator, a given connection's People Connections Preference settings, and properties set on a Connections task flow instance.

For information about People Connections Preferences, see Chapter 3, "Setting Your Personal Preferences." For information about People Connections defaults set by the application administrator, see the chapter, "Managing the People Connections Service," in the *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter*. For information about Connections task flow properties, see Section 25.3, "Setting People Connections Service Task Flow Properties."

This section provides information about working with Connections. It contains the following subsections:

- Section 25.2.3.1, "Viewing Your Connections"
- Section 25.2.3.2, "Personalizing Your View of Connections"
- Section 25.2.3.3, "Inviting Others to Connect"
- Section 25.2.3.5, "Responding to Invitations to Be a Connection"
- Section 25.2.3.6, "Creating and Managing Connections Lists"
- Section 25.2.3.7, "Deleting a Connection"

25.2.3.1 Viewing Your Connections

You can view your connections in any Connections task flow. One of these is always available on the **Connections** page that becomes available when you click your user name at the top of the application. In large lists of connections, you can use the search feature to locate a particular connection.

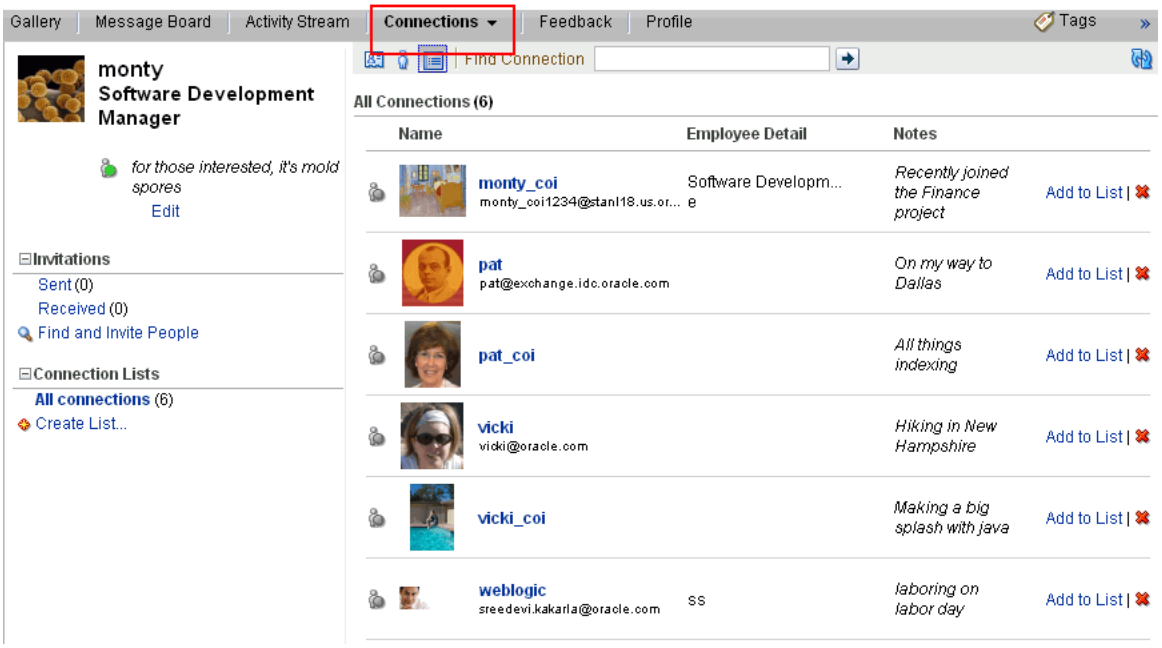
This section describes how to access the Connections page and view or search through your connections. It includes the following subsections:

- Section 25.2.3.1.1, "Viewing Your Connections"
- Section 25.2.3.1.2, "Searching Through Your Connections"

25.2.3.1.1 Viewing Your Connections To view your connections:

1. Log in, and click your user name at the top of the application.
2. On the resulting page, click the **Connections** tab to bring it forward (Figure 25–24).

Figure 25–24 The Connections Tab

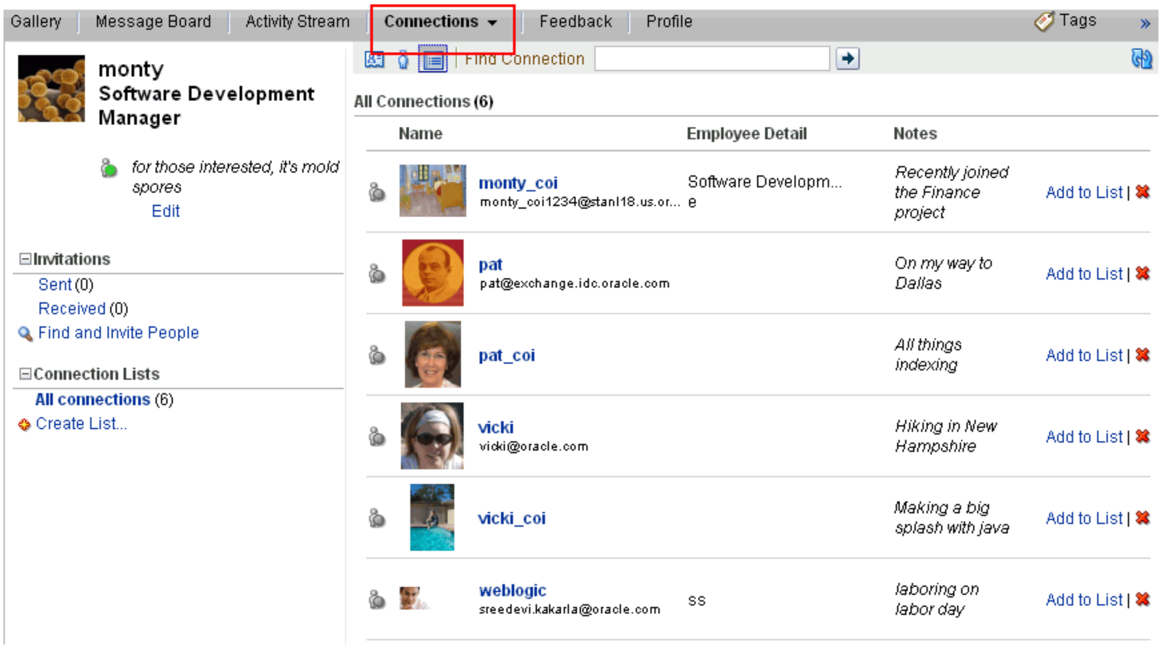


The **Connections** page displays all of your current connections. Click a connection name to open a Profile dialog and view profile details.

25.2.3.1.2 Searching Through Your Connections The People 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. Log in, and click your user name at the top of the application.
2. On the resulting page, click the **Connections** tab to bring it forward (Figure 25–25).

Figure 25–25 The Connections Tab



The **Connections** page displays all of your current connections.

3. Under **Connection Lists**, click the name of the connections list you want to search through, or click **All connections** to search through all of your connections.

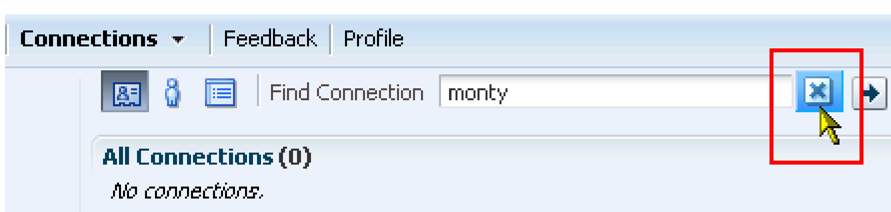
   The connections on the selected list appear to the right.

4. In the **Find Connection** field, enter the user name of the connection for which to search, and click the **Find connection** icon next to the field.

   Results appear to the right. Click a connection name to open a Profile dialog and view profile details.

To exit the search, click the **Close** icon that appears to the right of the **Find Connection** field (Figure 25–26).

Figure 25–26 Close Icon



25.2.3.2 Personalizing Your View of Connections

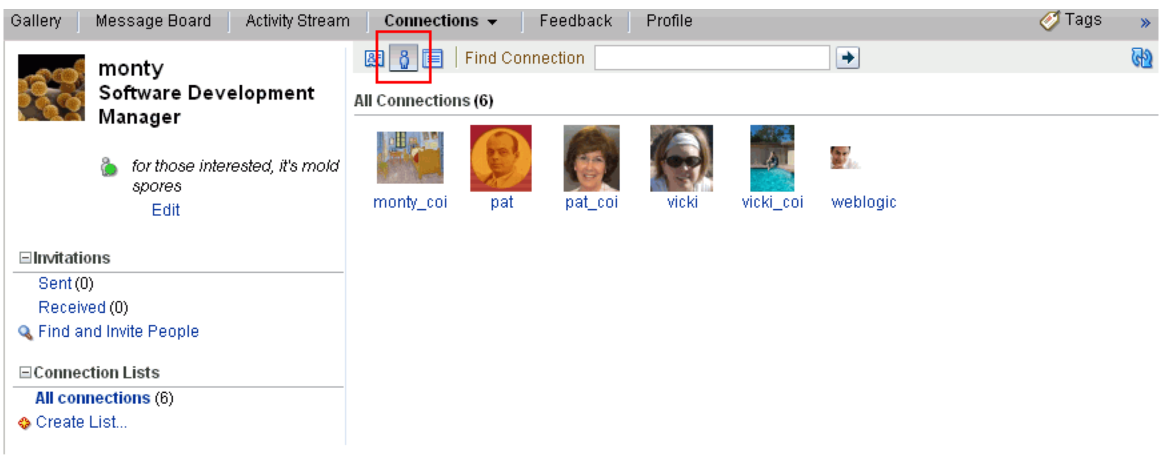
You can toggle your view of the main Connections task flow between Card Style, Iconic, and List Style.

Card Style displays each connection in a virtual business card and includes the connection's user name and status message and quick-access buttons for interacting with your connections (Figure 25–27).

Figure 25–27 Card Style View of Connections

Iconic displays the connection's personal profile photo and user name (Figure 25–28).

Figure 25–28 Iconic View of Connections



List Style displays the connection's personal profile photo, user name, job title, and personal status message (Figure 25–29)

Figure 25–29 List View of Connections

Additionally, you can select which connections to show. Choose from showing all connections or a custom list of connections that you created (see Section 25.2.3.6.1, "Creating a Connections List").

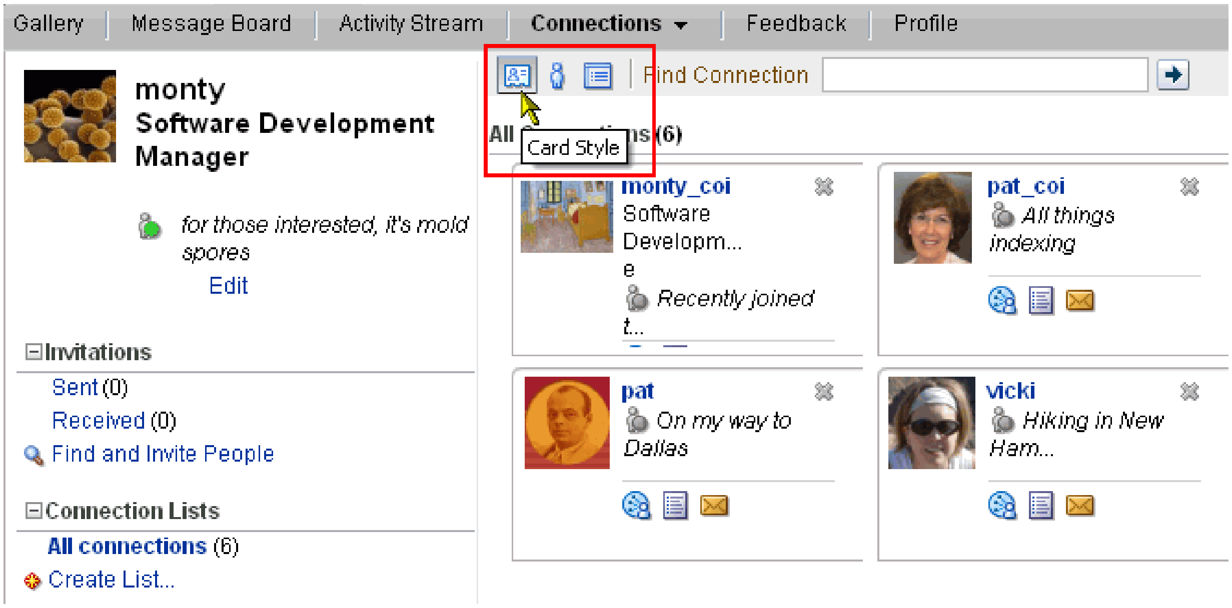
To personalize your view of the Connections task flow:

1. Log in, and click your user name at the top of the application.
2. On the resulting page, click the **Connections** tab to bring it forward.
3. Click the icon associated with your preferred view of Connections.

   Select from:

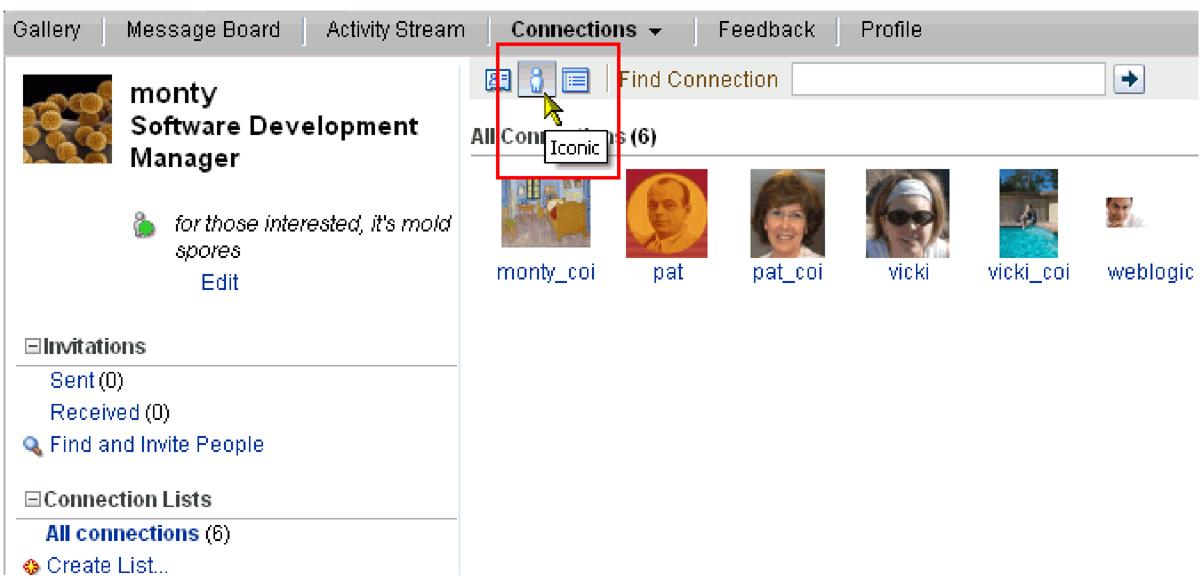
   - **Card Style** (Figure 25–30)

Figure 25–30 Card Style Icon



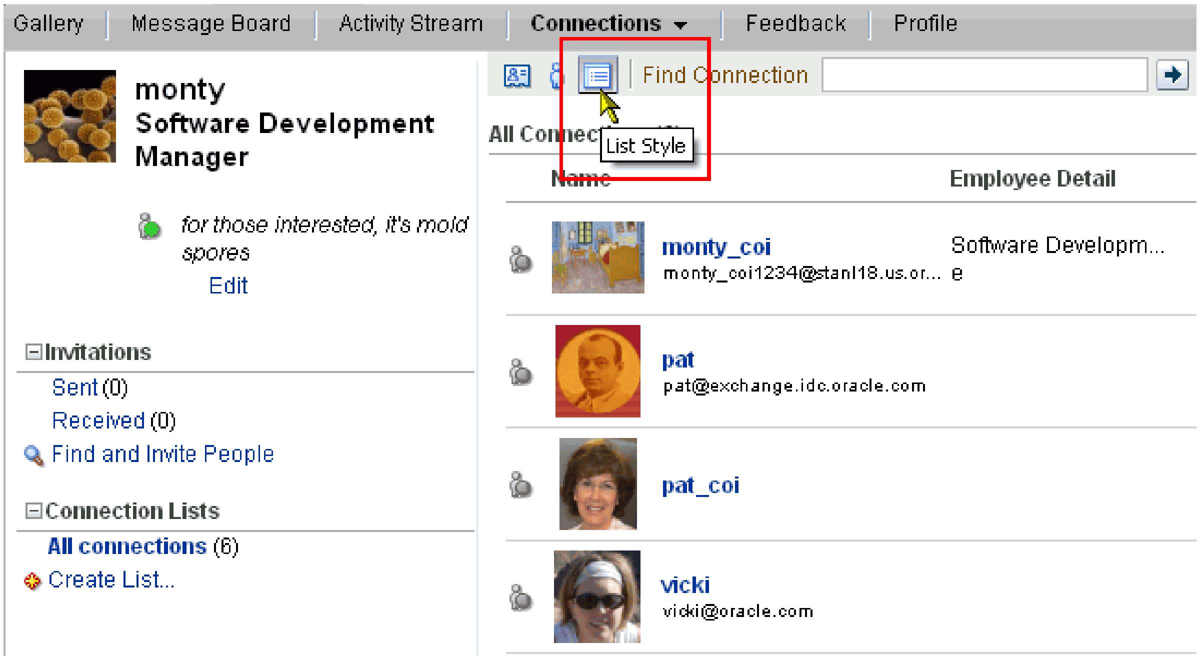
- **Iconic** (Figure 25–31)

Figure 25–31 Iconic Icon



- **List Style** (Figure 25–32)

Figure 25–32 List Style Icon



25.2.3.3 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 Feedback and Message Board. The level of access you have to a connection is determined by the People Connections defaults set by the application administrator, the individual user's People Connections Preference settings, and properties set on the task flow instance.

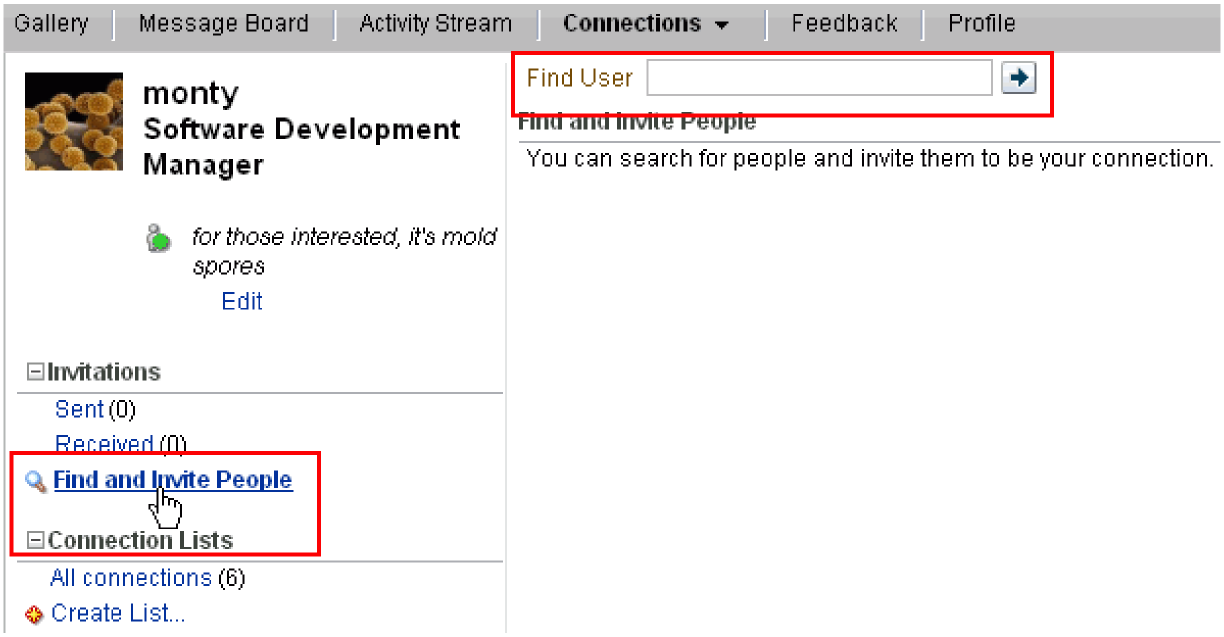
> **See Also:** For information about People Connections Preferences, see Chapter 3, "Setting Your Personal Preferences." For information about People Connections defaults set by the application administrator, see the chapter, "Managing the People Connections Service," in the *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter*. For information about Connections task flow properties, see Section 25.3, "Setting People Connections Service Task Flow Properties."

You can issue invitations from the Connections and Connections - Quick View task flows and from the **Connections** page that you access through your user name. This section describes the **Connections** page method.

To invite another user to connect:

1. Log in, and click your user name at the top of the application.
2. On the resulting page, click the **Connections** tab to bring it forward.
3. On the **Connections** page, click the **Find and Invite People** link to access the **Find User** field (Figure 25–33).

Figure 25–33 Find and Invite People Link and the Find User Field

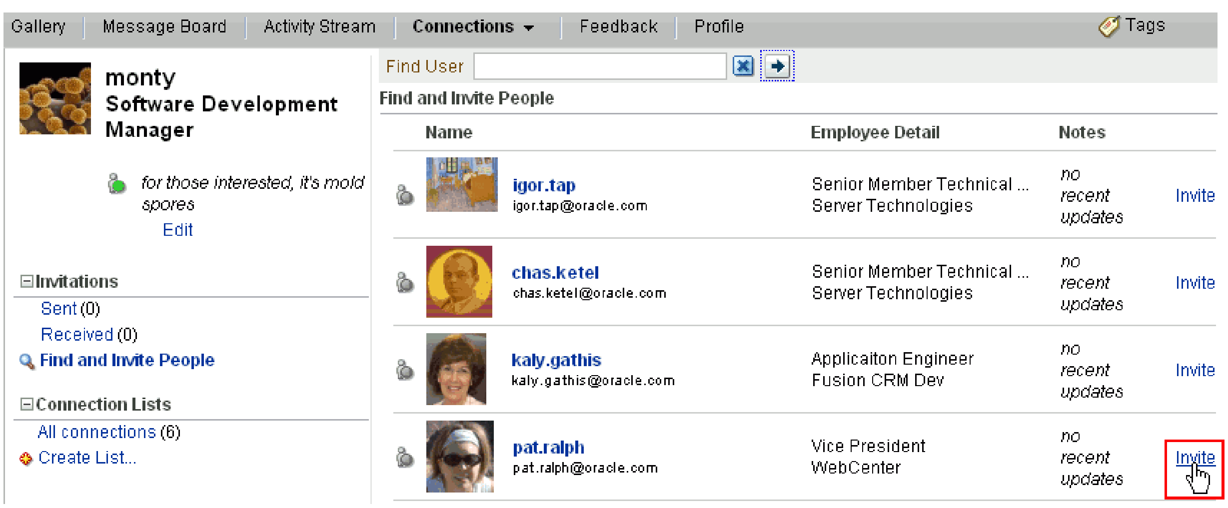


4. In the **Find User** field, enter the user name of the person you want to invite to be your connection and click the **Search** icon.

   Results are shown in a list format.

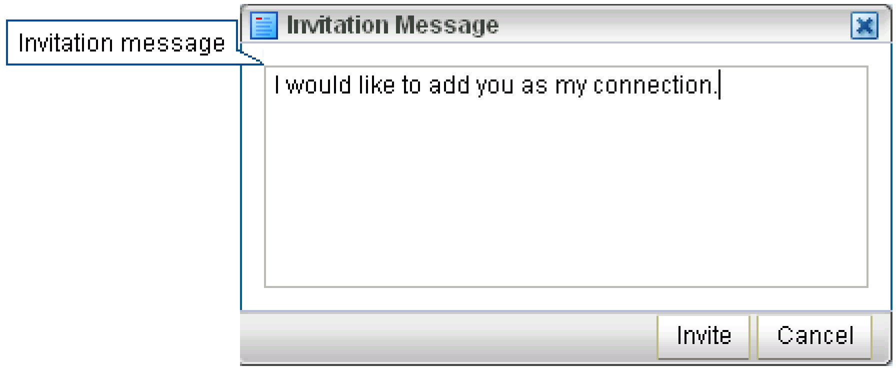
5. Click the **Invite** link next to the name of user to invite to be your connection (Figure 25–34).

Figure 25–34 An Invite Link Next to a Find User Result



6. In the resulting Invitation Message dialog, enter a connection invitation or use the default message (Figure 25–35).

Figure 25–35 Invitation Message Dialog Showing Default Message



7. Click **Invite**.

   If the person you have invited set Preferences to automatically accept all invitations, you are connected immediately. Otherwise, the invitation appears in the person's view of the **Connections** page. You can also view invitations from the Connections task flow, and you can navigate to them from the Connections - Quick View task flow (click **Manage Connections** to open the **Connections** page). For more information, see Section 25.2.3.4, "Viewing Invitations to Connect."

   See Also: For information about People Connections Preferences, see Chapter 3, "Setting Your Personal Preferences."

25.2.3.4 Viewing Invitations to Connect

You can view the invitations you have sent and received in the Connections task flow and on the Connections page. This section describes the **Connections** page case. It includes the following subsections:

- Section 25.2.3.4.1, "Viewing Invitations You Have Sent"
- Section 25.2.3.4.2, "Viewing Invitations You Have Received"

25.2.3.4.1 Viewing Invitations You Have Sent To view invitations you have sent:

1. Log in, and click your user name at the top of the application.
2. On the resulting page, click the **Connections** tab to bring it forward.
3. On the **Connections** page under **Invitations**, click **Sent**.

> **Note:** The number next to **Sent** represents the number of unanswered invitations you have sent.

25.2.3.4.2 Viewing Invitations You Have Received To view invitations you have received:

1. Log in, and click your user name at the top of the application.
2. On the resulting page, click the **Connections** tab to bring it forward.
3. On the **Connections** page under **Invitations**, click **Received**.

> **Note:** The number next to **Received** represents the number of unanswered invitations you have received.

25.2.3.5 Responding to Invitations to Be a Connection

The People Connections service provides two methods for responding to an invitation to connect:

- You can set your Connections Preferences to automatically accept such invitations.

  See Also: For information about setting Connections Preferences, see Chapter 3, "Setting Your Personal Preferences."

- You can manually accept, decline, or delete such invitations through the main Connections task flow or on the **Connections** page associated with your user name.

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

To respond to invitations to connect:

1. Log in, and click your user name at the top of the application.
2. On the resulting page, click the **Connections** tab to bring it forward.
3. On the **Connections** page under **Invitations**, click **Received**.

   A list of the invitations to which you have not responded appears.
4. To the right of a given invitation, click your desired response.

   Choose from:

   - **Accept** link—Make the connection.
   - **Decline** link—Refuse the connection, with notification. When you decline an invitation to connect, the issuer becomes aware of this by watching his sent invitations.
   - **Delete** icon—Remove the connection, without responding. When you delete 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** page.

25.2.3.6 Creating and Managing Connections Lists

The People Connections service 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 your **Connections** page.
- You can configure a Connections - Card task flow instance to display only the connections on a specified list (for more information, see Section 25.3, "Setting People Connections Service Task Flow Properties").
- You can configure Activity Stream Preferences to show activities only from specified connections lists (for more information, see Section 3.8.1, "Setting Activity Stream Preferences").
- You can configure a particular instance of an Activity Stream to show activities only from specified connections (for more information, see Section 25.2.6, "Working with the Activity Stream Task Flow").

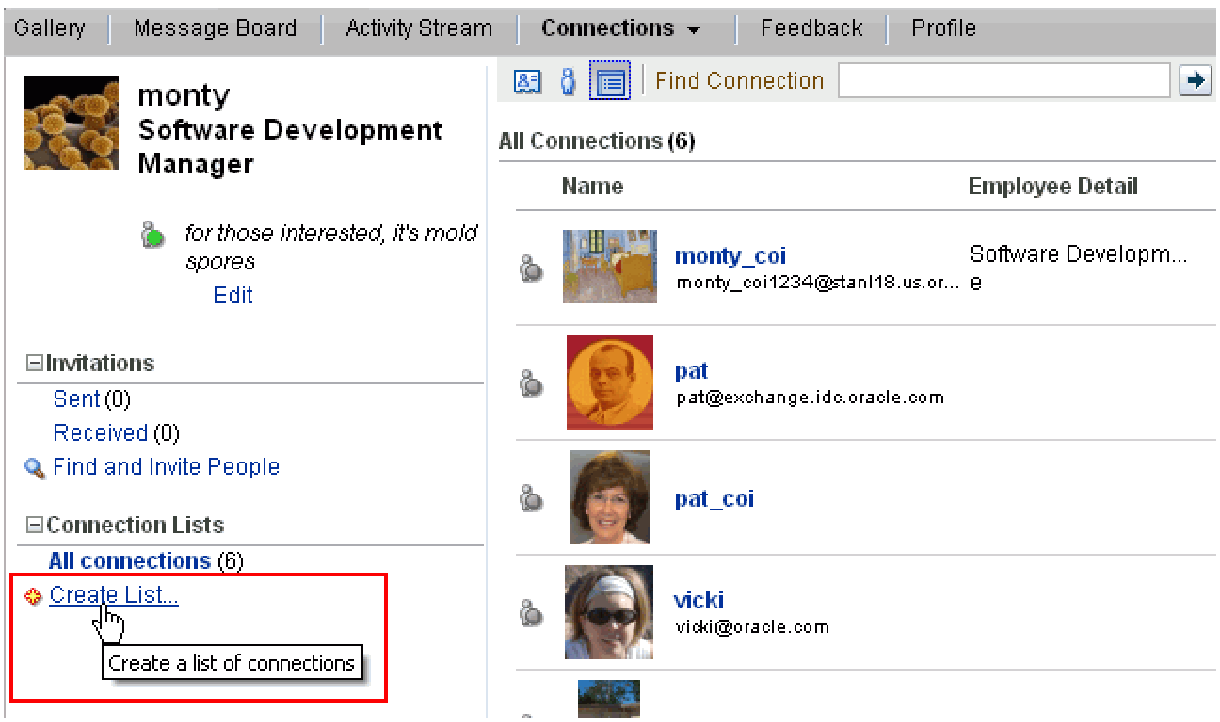
This section describes how to create and manage lists of connections. It contains the following subsections:

- Section 25.2.3.6.1, "Creating a Connections List"
- Section 25.2.3.6.2, "Adding a Connection to a List"
- Section 25.2.3.6.3, "Removing a Connection from a List"
- Section 25.2.3.6.4, "Deleting a Connections List"

25.2.3.6.1 Creating a Connections List To create a list of connections:

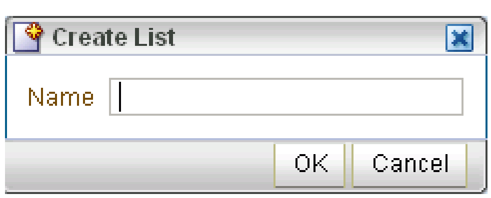
1. Log in, and click your user name at the top of the application.
2. On the resulting page, click the **Connections** tab to bring it forward.
3. On the **Connections** page under **Connection Lists**, click **Create List** (Figure 25–36).

Figure 25–36 Create List Link



4. Click **Create List** to open the Create List dialog (Figure 25–37).

Figure 25–37 Create List Dialog



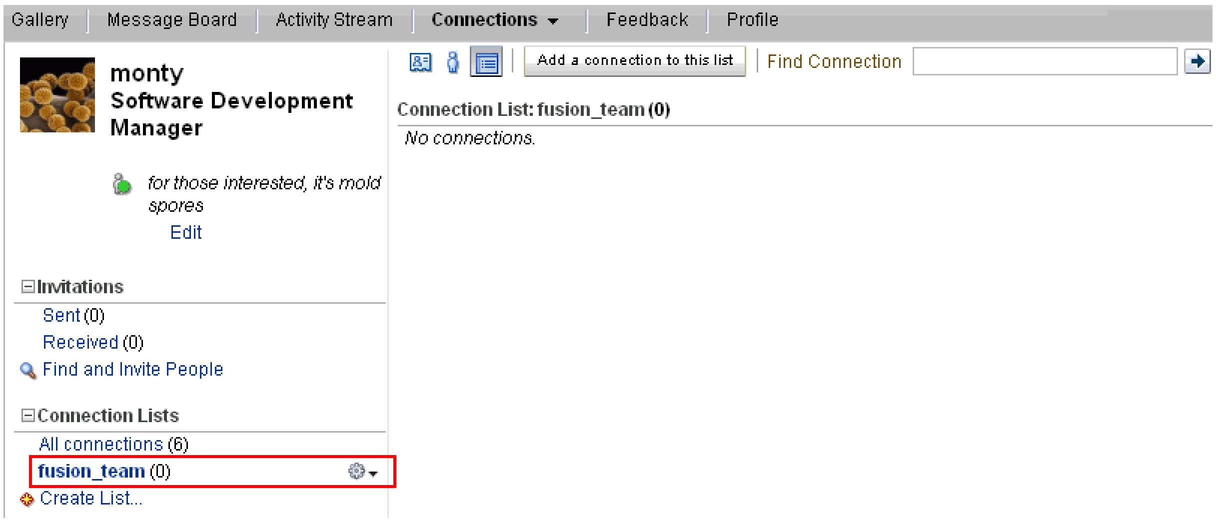
5. In the **Name** field, enter a name for your list of connections.

6. Click **OK**.

   See Also: For more information, Section 25.2.3.6.2, "Adding a Connection to a List."

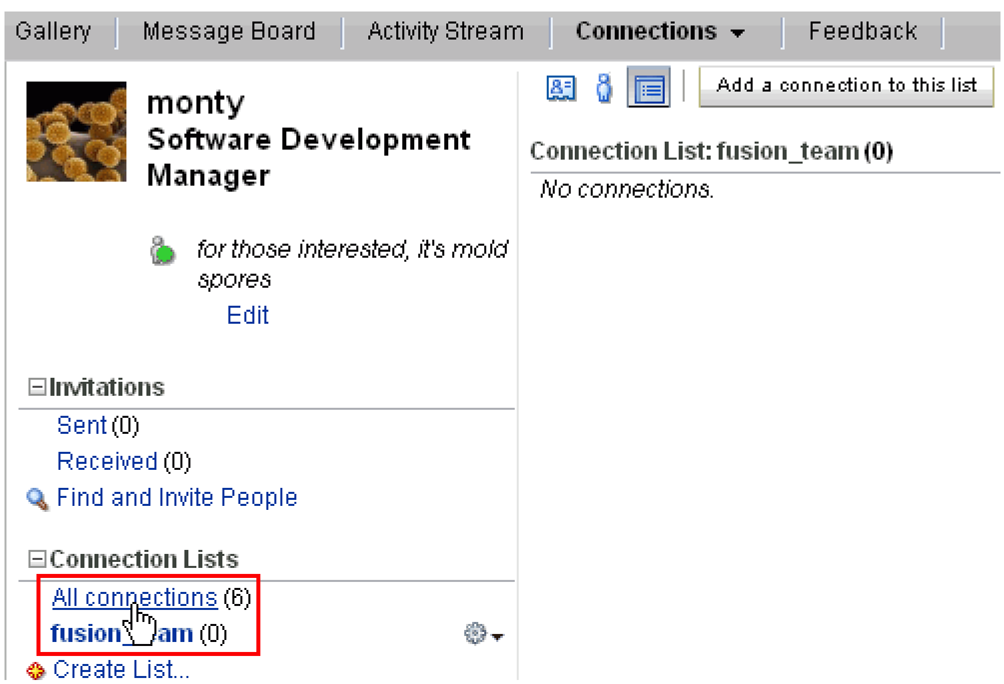
   Once you create a list, the **Connections** page presents a view of that list (Figure 25–38).

Figure 25–38 View of a Newly Created Connections List (fusion_team)



To view all of your connections, click the **All connections** link that appears under the **Connection Lists** heading (Figure 25–39).

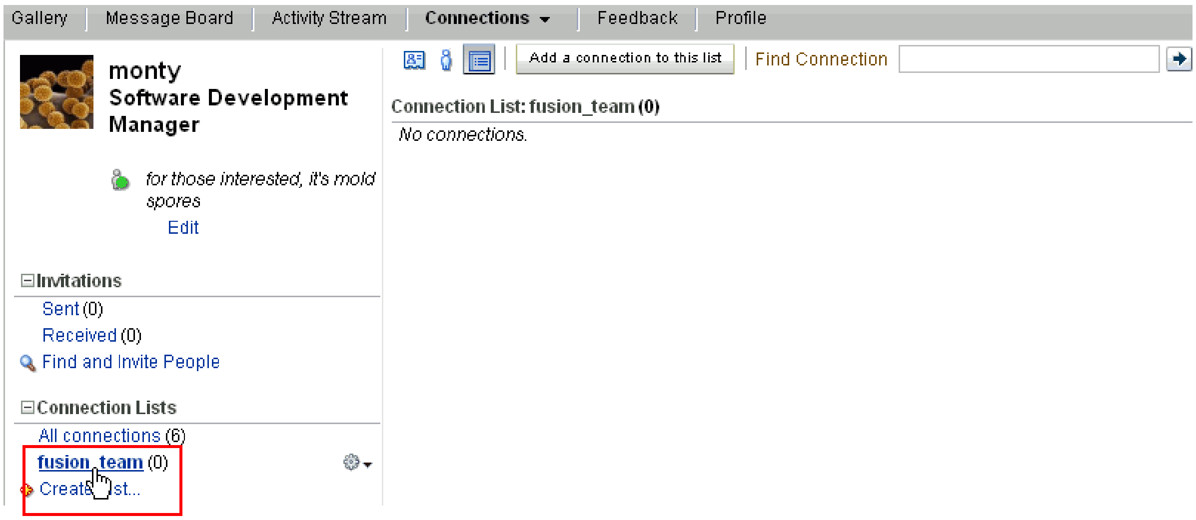
Figure 25–39 The All connections Link



25.2.3.6.2 Adding a Connection to a List To add a connection to a connections list:

1. Log in, and click your user name at the top of the application.
2. On the resulting page, click the **Connections** tab to bring it forward.
3. On the **Connections** page under **Connection Lists**, click the name of the list you want to populate to open a view of the list (Figure 25–40).

Figure 25–40 Opening a View of the fusion_team List



4. In the list view, click **Add a connection to this list** (Figure 25–41) to open the Add Member dialog (Figure 25–42).

Figure 25–41 Add a connection to this list Button

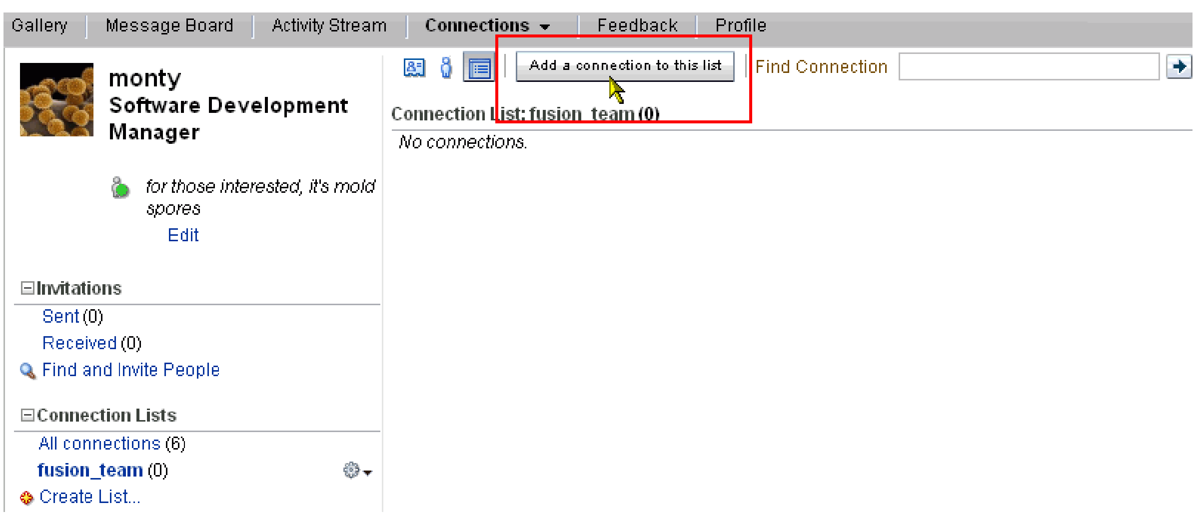
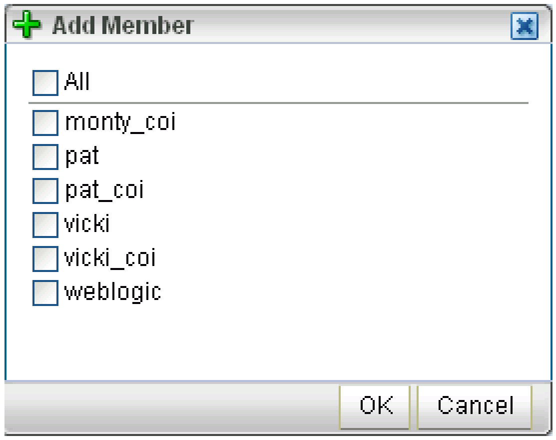


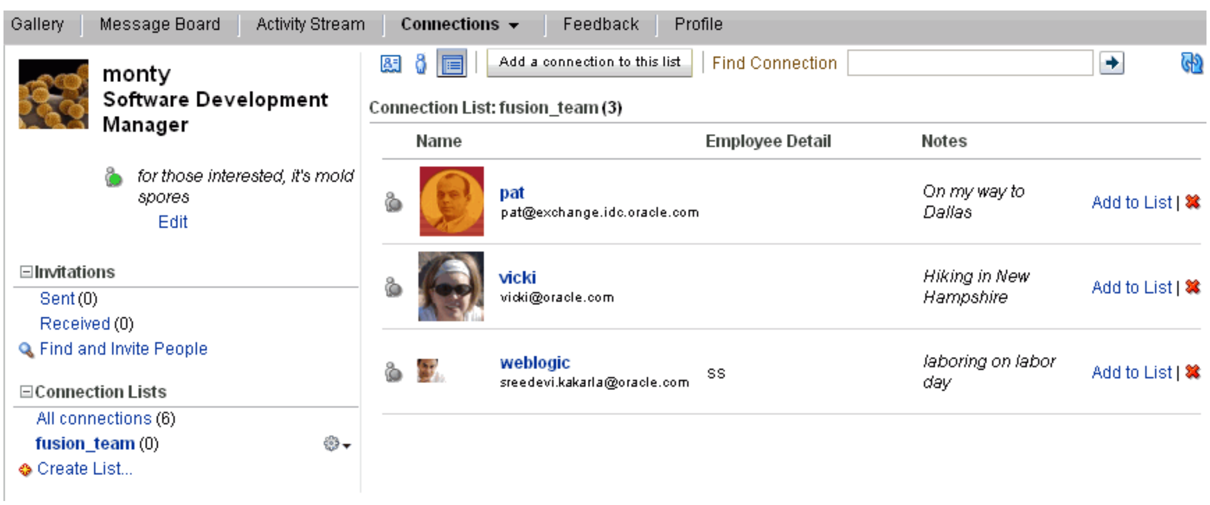
Figure 25–42 Add Member Dialog



5. Select **All** to add all of your connections to the list, or select individual connections to add.
6. Click **OK**.

   The list is populated, and selected members appear to the right of the list (Figure 25–43).

Figure 25–43 A Newly Populated List



7. To exit the list, click **All connections** under Connection Lists.

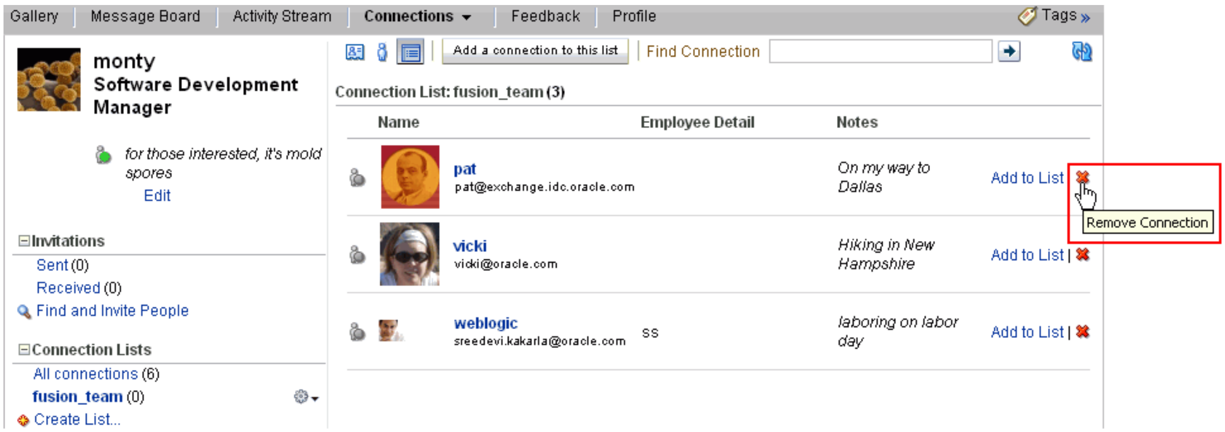
You can use the **Add to List** link to the right of a list member to add them or remove them from other lists. For more information, see Section 25.2.3.6.3, "Removing a Connection from a List."

25.2.3.6.3 Removing a Connection from a List To remove a connection from a list:

1. Log in, and click your user name at the top of the application.
2. On the resulting page, click the **Connections** tab to bring it forward.
3. On the **Connections** page under **Connection Lists**, click the list from which to remove connections.

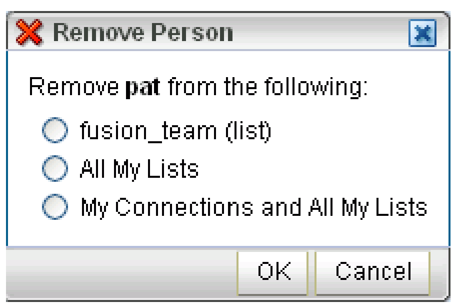
4. Click the **Remove Connection** icon next to the name of the connection you want to remove from the list (Figure 25–44).

Figure 25–44 Remove Connection Icon



5. In the resulting Remove Person dialog, select the option that best suits how you want to remove the connection (Figure 25–45).

Figure 25–45 Remove Person Dialog



Choose from:

- ***list_name* (list)**—Remove the selected connection from the current list.
- **All My Lists**—Remove the selected connection from all of your lists.
- **My Connections and All My Lists**—Remove the selected connection from all of your lists, and sever your connection with this user.

6. Click **OK**.

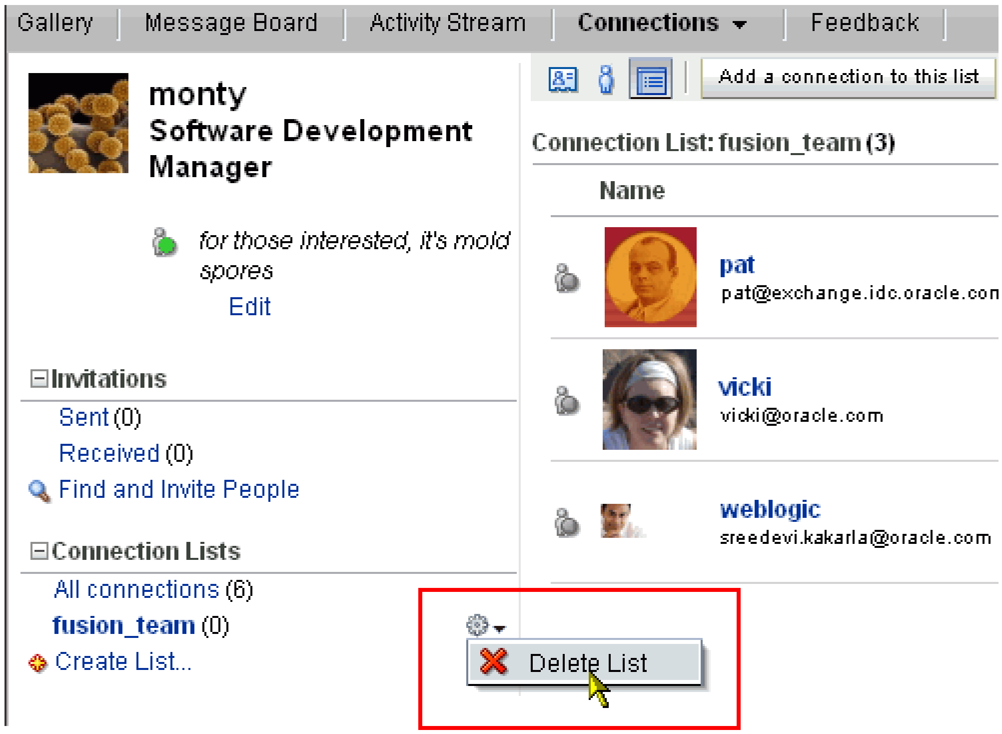
25.2.3.6.4 Deleting a Connections List When you delete a list, you are not deleting the connections you added to the list. You are deleting only the particular grouping mechanism, that is, the list itself. The connections that were on the deleted list continue to be your connections.

To delete a connections list:

1. Log in, and click your user name at the top of the application.
2. On the resulting page, click the **Connections** tab to bring it forward.

3. On the **Connections** page, click the **Actions** icon next to the list you want to delete and select **Delete List** from the resulting context menu (Figure 25–46).

Figure 25–46 Actions Icon and Delete List Option



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

   The list is deleted, and your view of the **Connections** page is returned to the top level.

25.2.3.7 Deleting a Connection

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

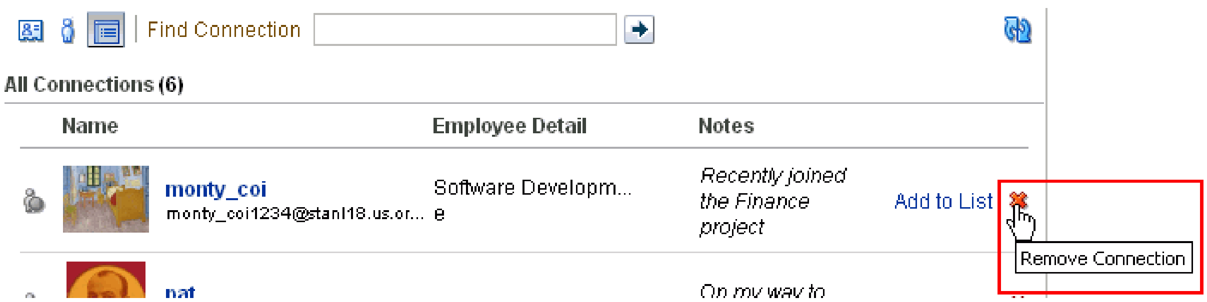
To remove one of your connections:

1. Log in, and click your user name at the top of the application.
2. On the resulting page, click the **Connections** tab to bring it forward.
3. On the **Connections** page, how you delete a connection depends on your currently selected view option:
   - In Card Style view, click the **Remove** icon in the card header (Figure 25–47).

Figure 25–47 Remove Icon in Card Style View

- In List Style view, click the **Remove Connection** link to the right of the connection (Figure 25–48).

Figure 25–48 Remove Connection Link in List Style View



Note: There is no option to remove a connection in Iconic view.

---

4. In the resulting Remove Person dialog, click **OK**.

25.2.4 Working with Feedback Task Flows

Feedback provide a means of viewing and posting user feedback. You can view the feedback you have posted and that was posted for you in your own view of the Feedback task flow. You can view all the feedback left for other users and post feedback for those users in their views of the Feedback task flow, provided they have granted you view and post access.

When you view another user's feedback, you can view only the feedback they have received from others. You cannot view the feedback they have sent, except in the views of the users for whom the feedback was posted.

> **See Also:** Use Preferences settings to configure user access to your Feedback. For more information, see Section 3.8.5, "Setting Feedback Preferences."

This section discusses how to post feedback and how to hide, show, sort, and filter feedback messages. It contains the following subsections:

- Section 25.2.4.1, "Viewing Feedback You Have Posted or Received"
- Section 25.2.4.2, "Posting Feedback"
- Section 25.2.4.3, "Sorting and Filtering Feedback Posts"

- Section 25.2.4.4, "Hiding Feedback in Your Own View"
- Section 25.2.4.5, "Showing Hidden Feedback Posts"
- Section 25.2.4.6, "Deleting Feedback You Have Posted"
- Section 25.2.4.7, "Hiding Feedback Action Links and Icons on a Task Flow Instance"

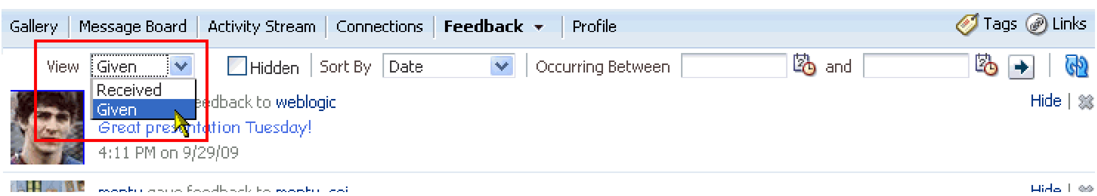
25.2.4.1 Viewing Feedback You Have Posted or Received

A **View** menu on the **Feedback** page provides a means of viewing the feedback you have posted for others and the feedback you have received yourself.

To view feedback you have posted or received:

1. Log in, and click your user name at the top of the application.
2. On the resulting page, click the **Feedback** tab to bring it forward.
3. From the **View** dropdown list (Figure 25–49), select either:
   - **Given—**To view the feedback you have posted for others
   - **Received—**To view the feedback others have left for you

Figure 25–49 View Menu Options on the Feedback Page



25.2.4.2 Posting Feedback

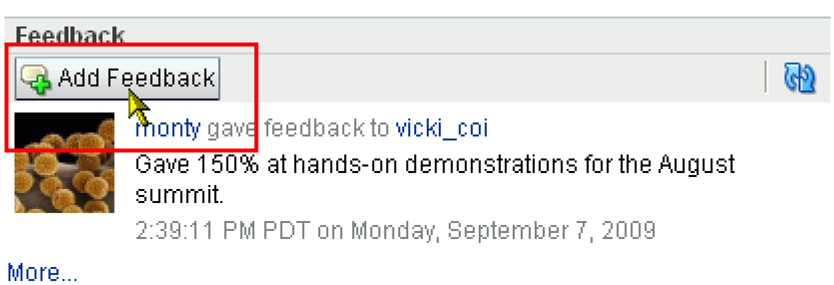
Use Feedback to pass along remarks to your connections about their efforts and results. Keep in mind that a wider audience than just the connection may see your feedback message.

To post a Feedback message:

1. Log in, and view the profile gallery of the person for whom to leave feedback.

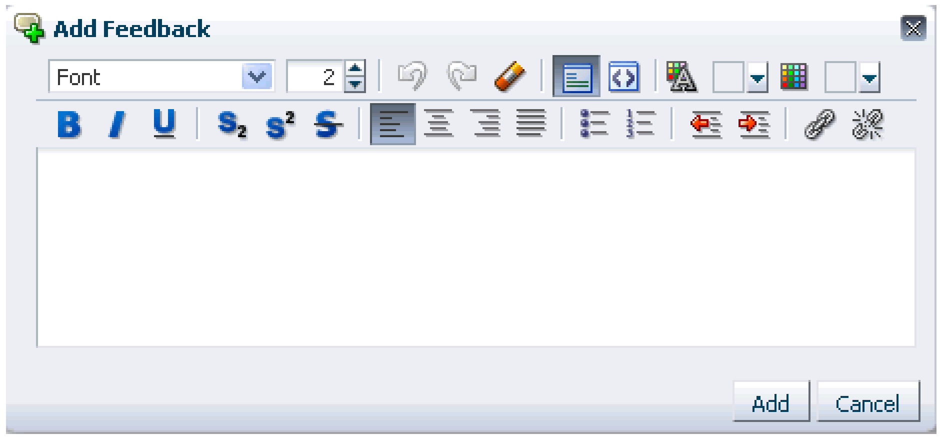
   For more information, see Section 25.2.2.1, "Viewing Profile Details."
2. In the Feedback task flow, click **Add Feedback** (Figure 25–50).

Figure 25–50 Add Feedback Button in a Feedback Task Flow



3. In the resulting Add Feedback dialog, enter your feedback in the text area and click the **Add** button when you have finished (Figure 25–51).

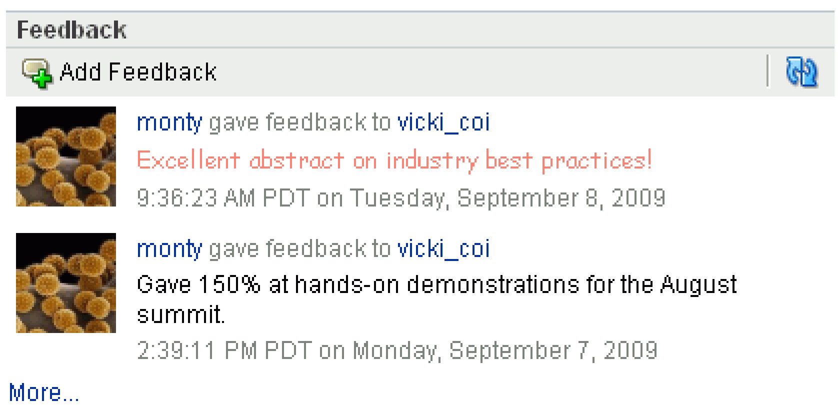
Figure 25–51 Add Feedback Dialog



The Add Feedback dialog provides an integrated Rich Text Editor that enables you to add styles, links, and other HTML encoding to your feedback. For information about how to use Rich Text Editor controls, see Table 18–10, " Rich Text Editor Controls".

Once you click the **Add** button, your feedback appears in the selected user's view of the Feedback task flow (Figure 25–52).

Figure 25–52 Feedback in a Feedback Task Flow



25.2.4.3 Sorting and Filtering Feedback Posts

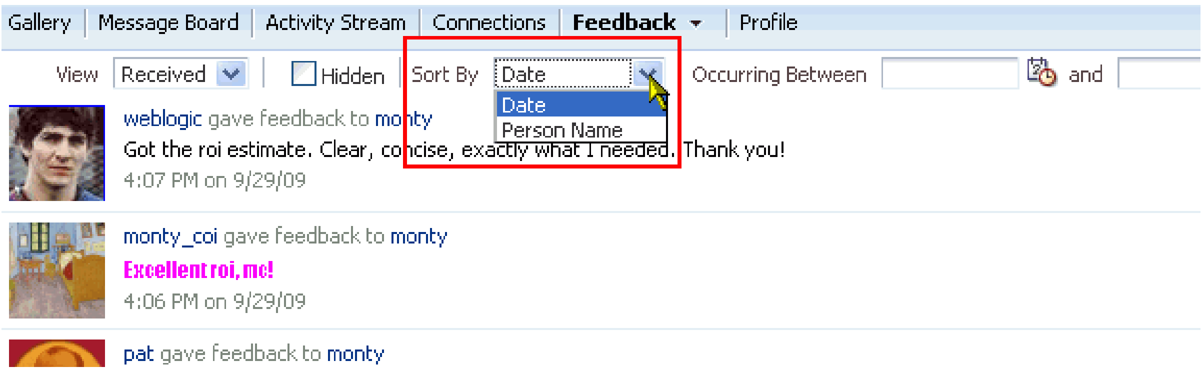
The **Feedback** page (and the main Feedback task flow) includes sorting and filtering features for controlling what is shown in your view. Use the sorting feature to sort your feedback by date or by person—that is, the user name of the person who left the feedback. Use the filtering feature to display feedback posted on a particular date or within a given date range.

To sort and filter your feedback:

1. Log in, and click your user name at the top of the application.
2. Click the **Feedback** tab to bring it forward.

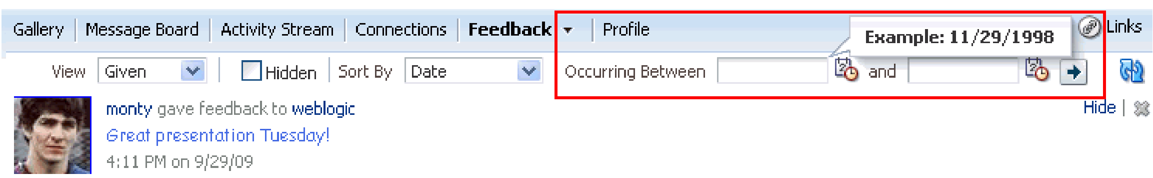
3. From the **Sort By** dropdown list (Figure 25–53), select from:
   - **Date**—To sort Feedback posts from the most recent to the oldest.
   - **Person Name**—To sort Feedback posts by the name of the user who left it for you (Received) or by the name of the user you left it for (Given).

Figure 25–53 Sort By Dropdown List on Feedback Page



4. To specify a date range within which to view Feedback posts, enter a start date in the field that follows **Occurring Between** and enter an end date in the field that follows **and** (Figure 25–54).

Figure 25–54 Date Range Fields on the Feedback Page



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 Spaces, 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.

---

5. Click the **Search** icon.

   All of the Feedback posts (either received or given) that fall within the specified date range appear on the **Feedback** page (or the Feedback task flow, whichever you used).

   Tip: To remove the date filtering criteria from your Feedback view, clear the date range fields and click the **Search** icon.

25.2.4.4 Hiding Feedback in Your Own View

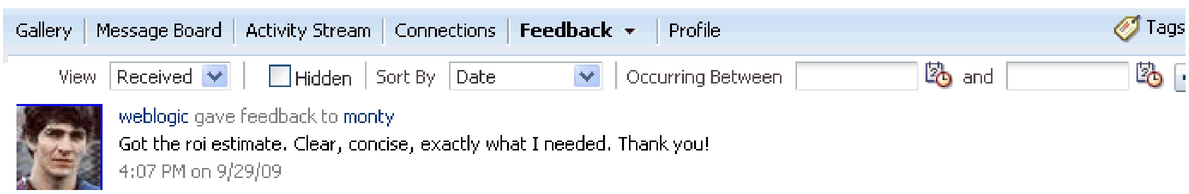
You can hide any feedback in your own view of the **Feedback** page. Hiding provides a means of removing Feedback posts from your own view without actually deleting them. Users to whom you have given access to your feedback can still see the posts you have hidden.

> **See Also:** For more information about undoing this action, see Section 25.2.4.5, "Showing Hidden Feedback Posts").

To hide feedback in your own view:

1. Log in, and click your user name at the top of the application.
2. On the resulting page, click the **Feedback** tab to bring it forward.
3. Click the **Hide** link next to the feedback message to hide (Figure 25–55).

Figure 25–55 Hide Link on a Feedback Message



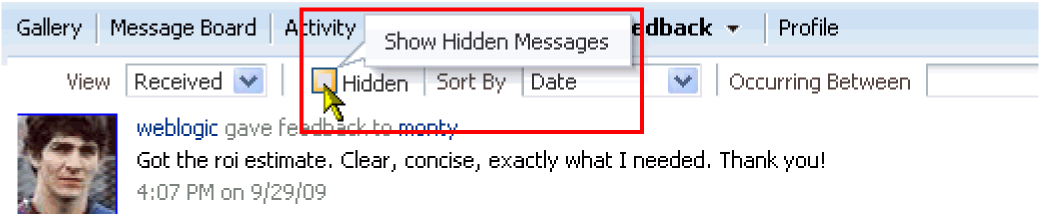
25.2.4.5 Showing Hidden Feedback Posts

Use the **Hidden** checkbox on the **Feedback** page to show all the feedback you have hidden. The **Hidden** checkbox provides a means of showing all hidden feedback in one operation, making it available to be unhidden or deleted.

To view and show or delete hidden feedback posts:

1. Log in, and click your user name at the top of the application.
2. Click the **Feedback** page to bring it forward.
3. Select **Hidden** at the top of the page (Figure 25–56).

Figure 25–56 Hidden Checkbox on a Feedback Page



4. All the Feedback posts you have hidden are shown.
5. Use the link or icon next to a Feedback post to show it or delete it.
   - To change a post from a hidden to a shown state, click the **Unhide** link to the right of it.
   - To delete a hidden post, click the **Delete** icon to the right of it.
6. To remove hidden Feedback posts from your view, clear the **Hidden** checkbox.

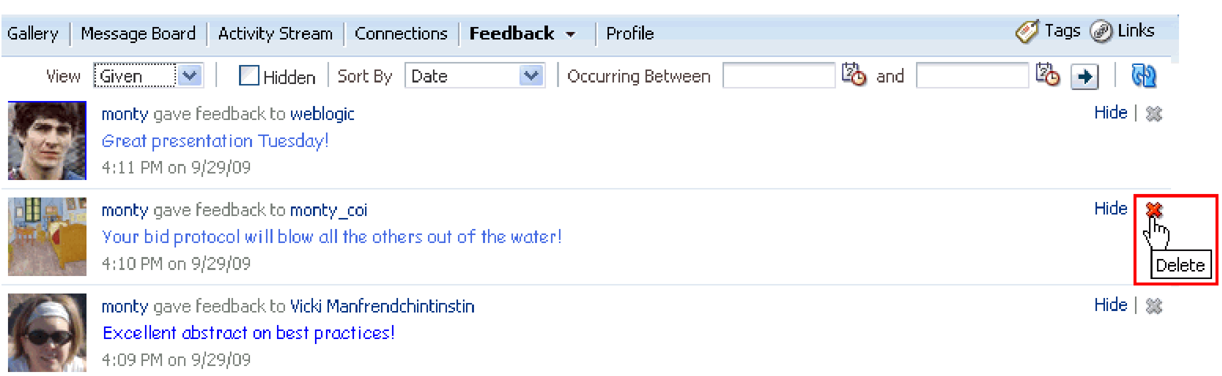
25.2.4.6 Deleting Feedback You Have Posted

You can delete feedback you have posted to other users provided your WebCenter Spaces administrator has enabled you to do so (for more information, see the chapter, "Managing the People Connections Service," in the *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter*).

To delete Feedback you have posted:

1. Log in, and click your user name at the top of the application.
2. Click the **Feedback** tab to bring it forward.
3. From the **View** dropdown list, select **Given**.
4. Click the **Delete** icon next to the post you want to delete (Figure 25–57).

Figure 25–57 Delete Icon Next to a Feedback Post on the Feedback Page



5. 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.

25.2.4.7 Hiding Feedback Action Links and Icons on a Task Flow Instance

Advanced users with page edit privileges can set a property on a Feedback – Quick View task flow to hide the actions normally associated with each posted feedback message. Such actions include the **Edit** and **Hide** links and the **Delete** icon.

Setting task flow properties affects every users' view of the task flow instance.

To hide actions on a Feedback – Quick View task flow instance:

1. Edit the task flow instance's properties as described in Section 10.4.2, "Setting Component Properties."
2. In the Component Properties dialog, click the **Parameters** tab to bring it forward.
3. Set the **Hide Actions** parameter to `true`.

> **Note:** To show hidden actions, set this parameter to `false`.

4. When you finish revising component properties, click **OK**.
5. Save your changes, and exit Oracle Composer.

25.2.5 Working with Message Board Task Flows

Message Board task flows provide a means of viewing and posting messages to your connections. This section discusses how to post messages and how to edit, hide, show, sort, filter, and delete messages. It contains the following subsections:

- Section 25.2.5.1, "Viewing Message Board Messages"
- Section 25.2.5.2, "Posting Message Board Messages"
- Section 25.2.5.3, "Editing Message Board Messages"
- Section 25.2.5.4, "Sorting and Filtering Message Board Messages"
- Section 25.2.5.5, "Hiding Messages You Have Received"
- Section 25.2.5.6, "Showing Hidden Messages"
- Section 25.2.5.7, "Deleting Message Board Messages"
- Section 25.2.5.8, "Hiding Message Board Action Links and Icons on a Task Flow Instance"

> **See Also:** Users grant access to their Message Boards through People Connections Preferences. For more information, see Section 3.8.4, "Setting Message Board Preferences."

25.2.5.1 Viewing Message Board Messages

In your personal space, you can view the messages other users have sent to you in your view of any Message Board task flow. You can view the messages you have sent to others in their views of any Message Board task flow. This section describes both scenarios using the **Message Board** page, though you can view messages wherever a Message Board task flow is placed.

Note: Message Boards placed in a group space provide a means of viewing and posting messages within the group space context. All Message Board task flow instances within a given group space display the same content: messages left by authorized users who are members of the group space.

This section includes the following subsections:

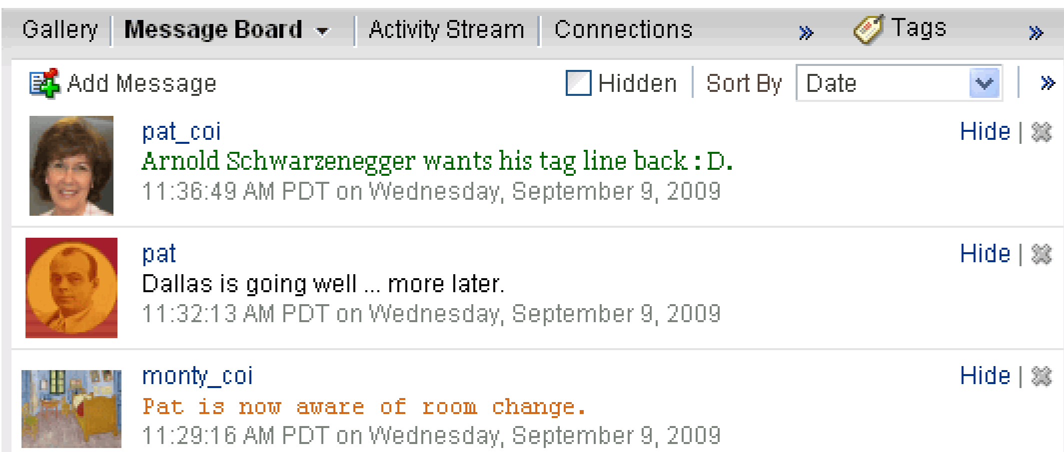
- Section 25.2.5.1.1, "Viewing Messages Left for You"
- Section 25.2.5.1.2, "Viewing Messages Left for Others"

25.2.5.1.1 Viewing Messages Left for You To view Message Board messages other users have left for you:

1. Log in, and click your user name at the top of the application.
2. Click the **Message Board** tab to bring it forward.

   The messages you have received appear on the page (Figure 25–58).

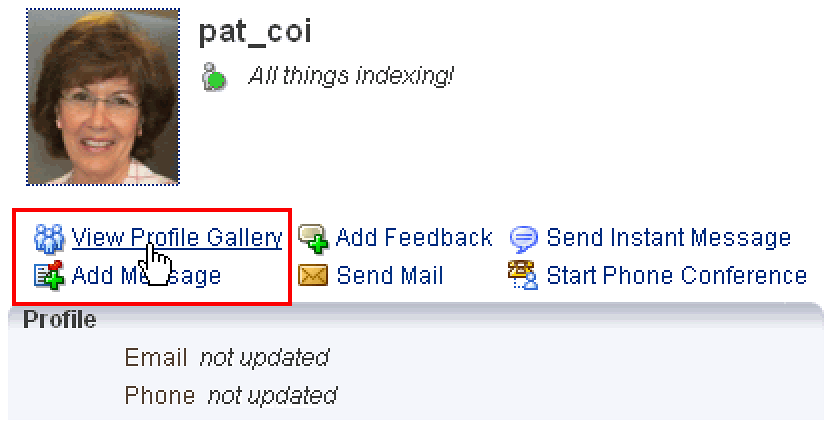
Figure 25–58 My Message Board Messages



25.2.5.1.2 Viewing Messages Left for Others To view Message Board messages other user have received (including those you have left for them):

1. Log in, and click your user name at the top of the application.
2. Click the **Connections** tab to bring it forward.
3. Click the user name of the connection whose messages you want to see.
4. In the resulting dialog, click **View Profile Gallery** (Figure 25–59).

Figure 25–59 View Profile Gallery Link

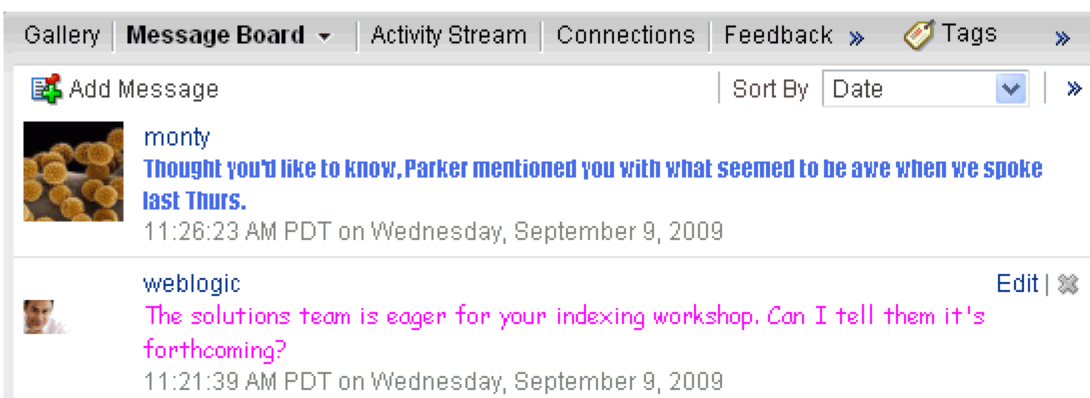


> **See Also:** There are various ways you can access this dialog or its equivalent. For more information, see Section 25.2.2.1, "Viewing Profile Details."

5. On the resulting page, click the **Message Board** tab to bring it forward.

   The messages the selected user has received appear on the page (Figure 25–60).

Figure 25–60 Another User's Message Board Messages



In Figure 25–60, notice that the message from user `weblogic` has an associated **Edit** link and **Delete** icon. Provided the Message Board is configured to enable you to do so, you can revise or delete the messages you leave for others.

See Also:

- For information about editing a message you have posted, see Section 25.2.5.3, "Editing Message Board Messages."
- For information about deleting a message you have posted, see Section 25.2.5.7, "Deleting Message Board Messages."
- For information about configuring application-level Message Board settings, see the "Configuring Message Board," section of *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter*.

25.2.5.2 Posting Message Board Messages

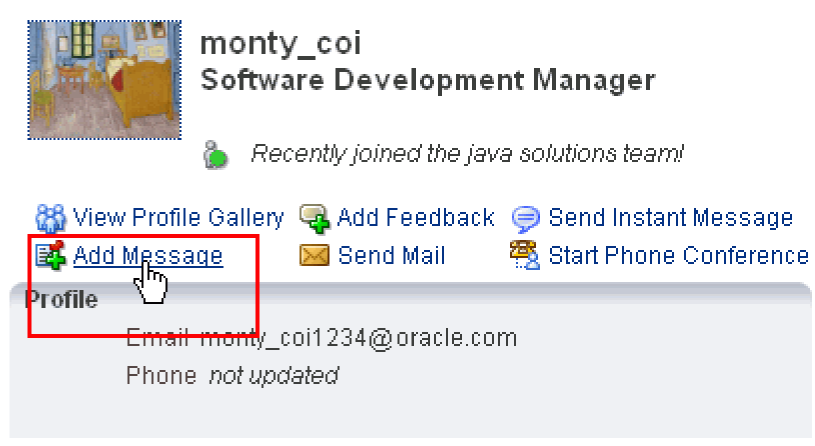
Your access to any user's Message Board is determined by the application permissions put in place by your application administrator (for more information, see the chapter, "Managing the People Connections Service" in the *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter*). Provided you have sufficient access, you can post a message to any user whose profile is available to you through the application user interface (for more information, see Section 25.2.2.1, "Viewing Profile Details"). You can also post messages to your own Message Board; though, depending on permissions, you may first have to log in.

This section describes one way to access another user's Message Board. You can use this information to try others.

To post a Message Board message:

1. Log in, and click your user name at the top of the application.
2. On the resulting page, click the **Connections** tab to bring it forward.
3. Click the name of the user for whom to leave a message.
4. In the resulting dialog, click **Add Message** (Figure 25–61).

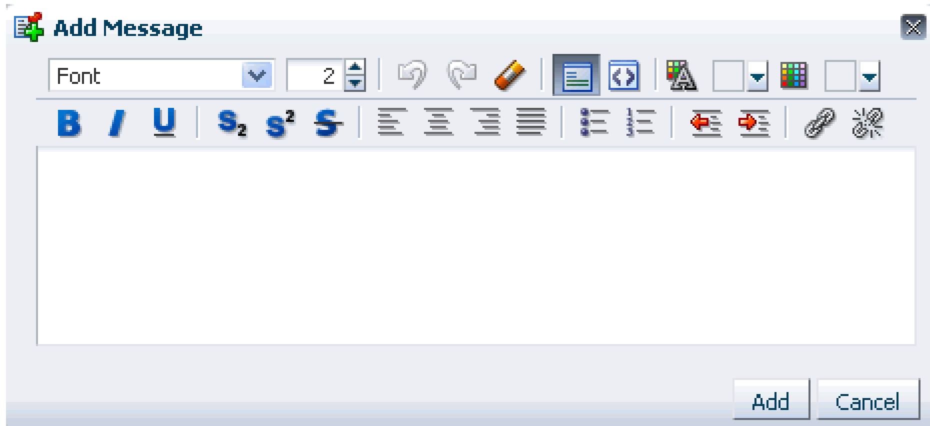
Figure 25–61 Add Message Link



See Also: There are various ways you can access this dialog or its equivalent. For more information, see Section 25.2.2.1, "Viewing Profile Details."

5. In the resulting Add Message dialog, enter a message (Figure 25–62).

Figure 25–62 Add Message Dialog



The Add Message dialog provides an integrated Rich Text Editor that enables you to add styles, links, and other HTML encoding to your message. For information about Rich Text Editor controls, see Table 18–10, " Rich Text Editor Controls".

6. Click **Add** when you have finished.

   Your message appears on the selected user's Message Board.

25.2.5.3 Editing Message Board Messages

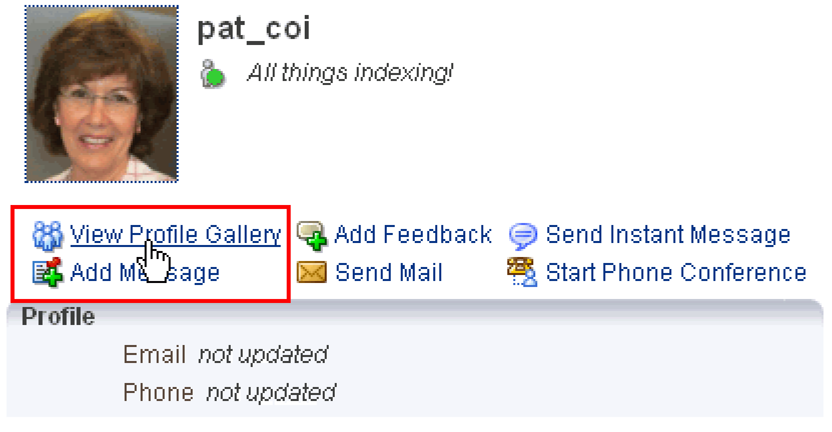
Your application administrator can configure the Message Board feature to allow users to revise the messages they leave. Provided this permission is in place, you can edit any message you post. This section describes how.

> **See Also:** For information about configuring application-level Message Board settings, see the "Configuring Message Board," section of *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter*.

To edit a Message Board message:

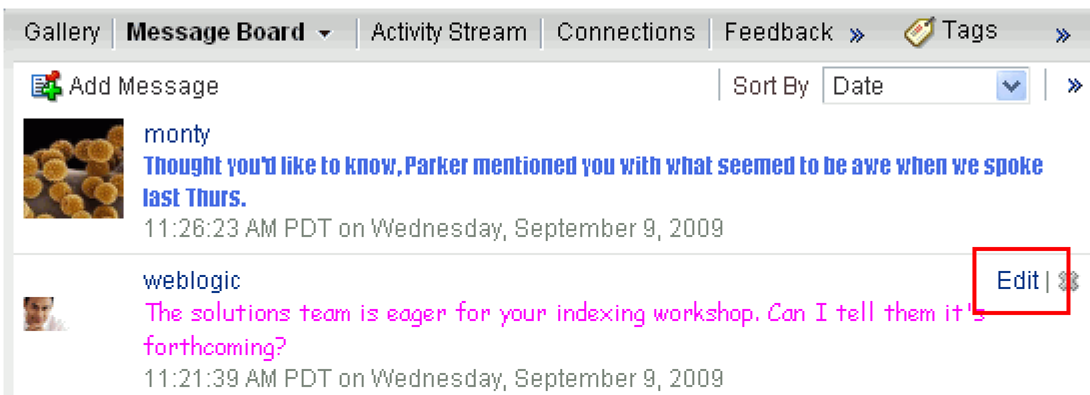
1. Log in, and click your user name at the top of the application.
2. On the resulting page, click the **Connections** tab to bring it forward.
3. Click the name of the user to whom you have sent a message you want to edit.
4. In the resulting dialog, click **View Profile Gallery** (Figure 25–63).

Figure 25–63 View Profile Gallery Link



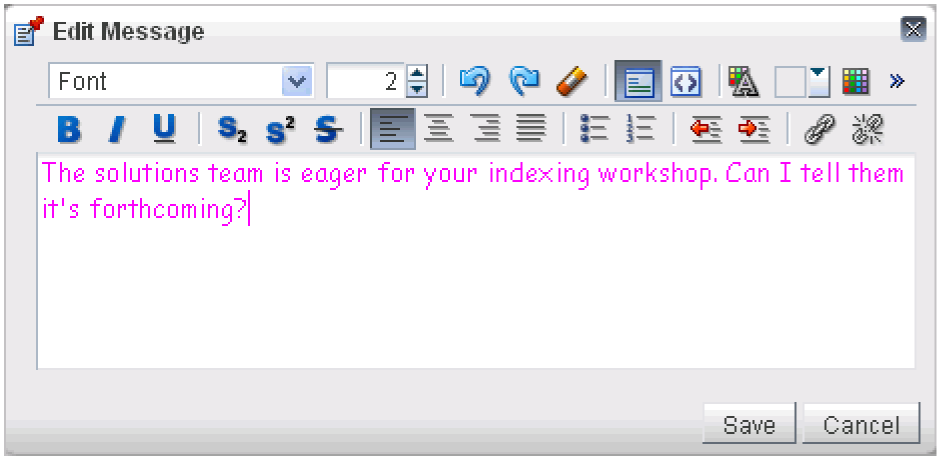
5. On the resulting page, click the **Message Board** tab to bring it forward.
6. Click the **Edit** link next to the message to edit (Figure 25–64).

Figure 25–64 Edit Link on a Message Board Task Flow



A Rich Text Editor (RTE) opens, prepopulated with your message text (Figure 25–65).

Figure 25–65 The Rich Text Editor



For information about RTE controls, see Table 18–10, " Rich Text Editor Controls".

7. Revise your message, and click **Save**.

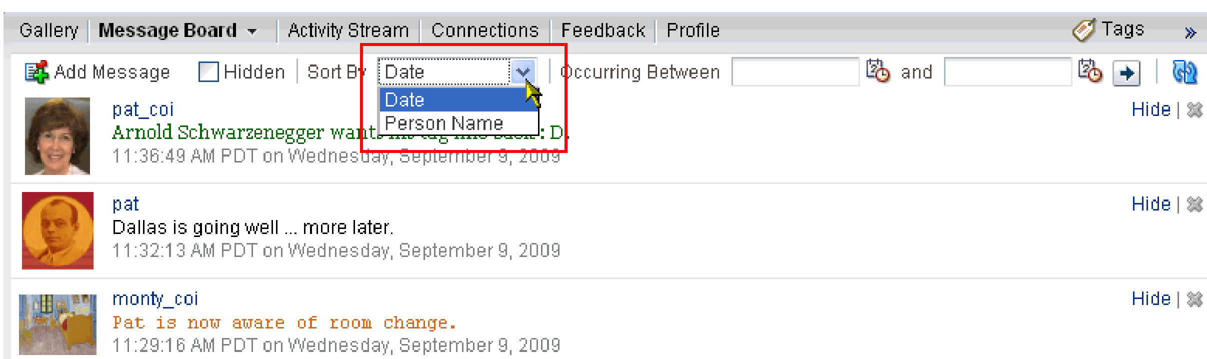
25.2.5.4 Sorting and Filtering Message Board Messages

Your full view of the Message Board task flow 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 display messages posted on a particular date or within a given date range.

To sort and filter your Message Board messages:

1. Log in, and click your user name at the top of the application.
2. On the resulting page, click the **Message Board** tab to bring it forward.
3. From the **Sort By** dropdown list, select a sorting option (Figure 25–66).

Figure 25–66 Sort By Dropdown List on a Message Board

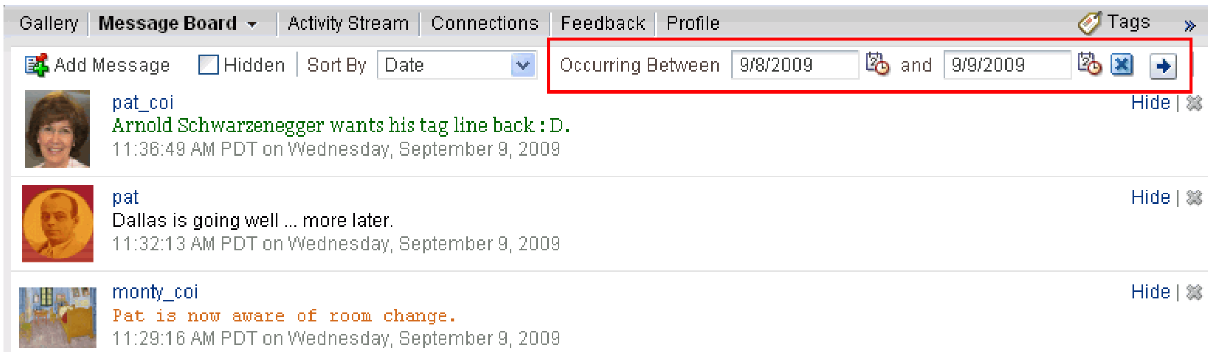


Choose from:

- **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.

4. To display messages between a particular range of dates, enter the beginning and end of the range respectively in the fields after **Occurring between** (Figure 25–67).

Figure 25–67 Date Range Fields on the Message Board Page



Instead of entering dates, you can click the **Select Date** icon next to a field to select a date from a calendar.

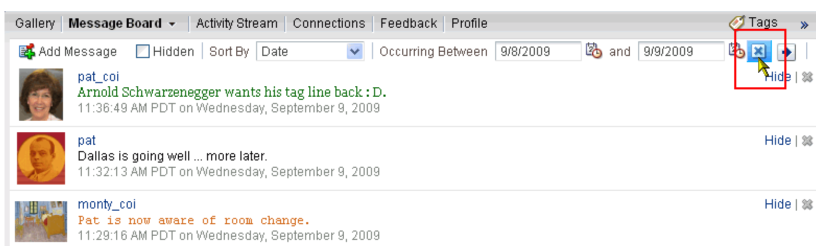
Accessibility Note: In WebCenter Spaces, you cannot use the keyboard to select a date from the calendar that pops up when you click the **Select Date** icon. Instead, manually enter the date into the field.

---

5. 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 **Remove** icon to the right of the date range fields.



25.2.5.5 Hiding Messages You Have Received

You can hide any message you have received on your Message Board. Hiding provides a means of removing messages from your own view without actually deleting them. Users to whom you have given access to your messages can still see the messages that you have hidden.

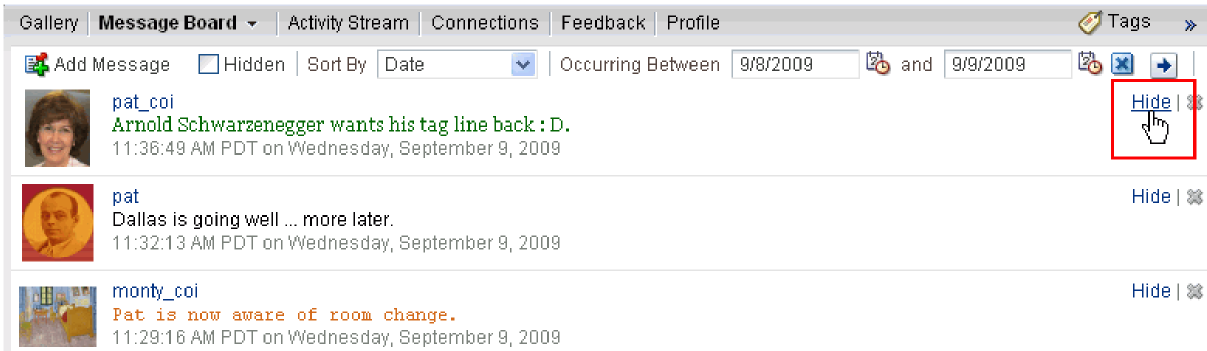
See Also: For information about Message Board Preferences, see Section 3.8.4, "Setting Message Board Preferences."

To hide Message Board messages:

1. Log in, and click your user name at the top of the application.

2. On the resulting page, click the **Message Board** tab to bring it forward.
3. Click the **Hide** link next to the message you want to hide (Figure 25–68).

Figure 25–68 Hide Link on a Message Board



The message is hidden in your view of the Message Board. Other users can see this message when they visit your view of the Message Board.

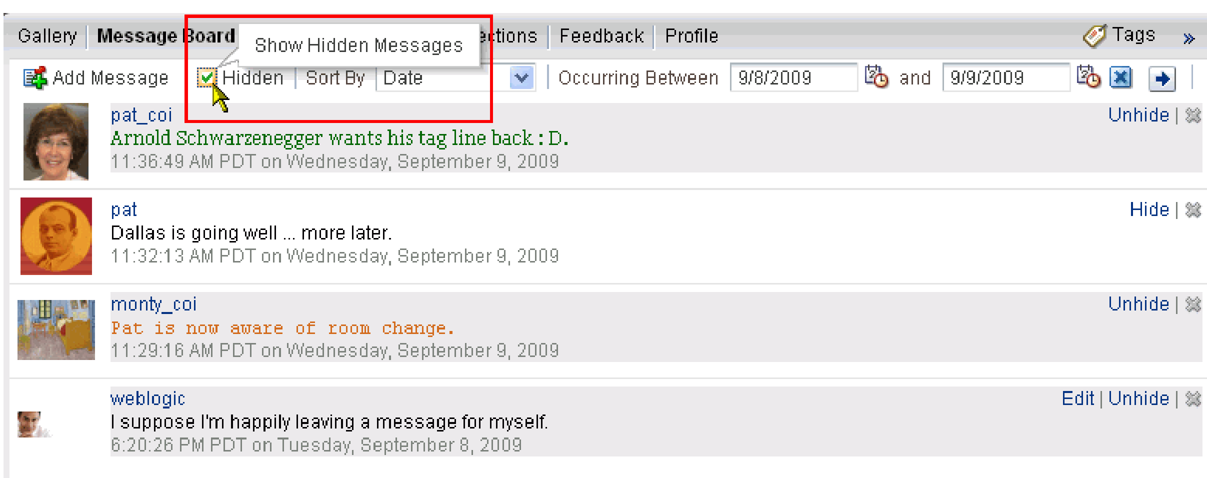
25.2.5.6 Showing Hidden Messages

Use the **Hidden** checkbox on the **Message Board** page to show all the messages you have hidden. The **Hidden** checkbox provides a means of showing all hidden messages in one operation, making it available to be unhidden or deleted.

To view and show or delete hidden Message Board messages:

1. Log in, and click your user name at the top of the application.
2. Click the **Message Board** page to bring it forward.
3. Select **Hidden** at the top of the page (Figure 25–56).

Figure 25–69 Hidden Checkbox on a Message Board Page



4. All the Message Board messages you have hidden are shown.
5. Use the link or icon next to a message to edit, show, or delete it.

- To edit a hidden message, click the **Edit** link to the right of it (for more information, see Section 25.2.5.3, "Editing Message Board Messages").
- To change a message from a hidden to a shown state, click the **Unhide** link to the right of it.
- To delete a hidden message, click the **Delete** icon to the right of it.

6. To remove hidden messages from your view, clear the **Hidden** checkbox.

25.2.5.7 Deleting Message Board Messages

Your application 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.

> **See Also:** For information about configuring application-level Message Board settings, see the "Configuring Message Board," section of *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter*.

To delete a message you sent:

1. Log in, and click your user name at the top of the application.
2. On the resulting page, click the **Connections** tab to bring it forward.
3. Click the user name of the person to whom you sent the message you want to delete, and select **View Profile Gallery** from the resulting dialog.
4. In the user's profile gallery, click the **Message Board** tab to bring it forward.
5. Click the **Delete** icon next to the message you want to delete (Figure 25–70).

Figure 25–70 Delete Icon on a Message You Sent

6. Click **Delete** in the confirmation dialog.

25.2.5.8 Hiding Message Board Action Links and Icons on a Task Flow Instance

Advanced users with page edit privileges can set a property on a Message Board – Quick View task flow to hide the actions normally associated with each posted message. Such actions include the **Edit** and **Hide** links and the **Delete** icon.

Setting task flow properties affects every users' view of the task flow instance.

To hide actions on a Message Board – Quick View task flow instance:

1. Edit the task flow instance's properties as described in Section 10.4.2, "Setting Component Properties."
2. In the Component Properties dialog, click the **Parameters** tab to bring it forward.
3. Set the **Hide Actions** parameter to `true`.

> **Note:** To show hidden actions, set this parameter to `false`.

4. When you finish revising component properties, click **OK**.
5. Save your changes, and exit Oracle Composer.

25.2.6 Working with the Activity Stream Task Flow

Use Activity Stream to track the activities of your connections, the activities occurring in selected services, and additional application activities (for more information, see Table 25–2, " Activities Tracked by Activity Stream").

The Activity Stream task flow provides a configuration feature for determining the content of a given task flow instance. Additionally, advanced users with page edit privileges can edit a task flow instance to specify the types of users for whom to display activities and whether activities are listed individually or summarized.

This section describes how to configure an Activity Stream task flow. It includes the following subsections:

- Section 25.2.6.1, "Setting Your Activity Stream Preferences on a Task Flow Instance"
- Section 25.2.6.2, "Specifying which Users to Show in an Activity Stream Task Flow Instance"
- Section 25.2.6.3, "Summarizing Activity Stream Entries in a Task Flow Instance"

> **See Also:** There is an order of precedence for which settings control the content and behavior of a task flow instance. It moves from administrative settings (application-wide), to Preferences (individual view of all instances), to a given instance. The settings on a given instance affect only your view when made in page view mode and everyone's view when made in page edit mode. For more information, see Section 25.1, "What You Should Know About the People Connections Service."

25.2.6.1 Setting Your Activity Stream Preferences on a Task Flow Instance

The following procedure steps you through configuration using the **Activity Stream** page that becomes available when you click your user name at the top of the application; however, these steps also work for the Activity Stream task flow.

Note: You may initially see a group space GUID in Activity Stream in lieu of a group space name. This can occur when you configure an Activity Stream task flow instance to display activity from a group space that was migrated. To get the group space name to display instead of the GUID, perform some action in the migrated group space. For example, add or remove a member. This refreshes the Activity Stream instance with the group space display name.

To configure an Activity Stream task flow instance:

1. Log in, and click your user name at the top of the application.
2. Click the **Activity Stream** tab to bring it forward.
3. Click the **Change the source, filter, and display options** icon (wrench) on the Activity Stream (Figure 25–71) to open the Activity Stream Configure dialog (Figure 25–72).

Figure 25–71 Personalize Icon on an Activity Stream

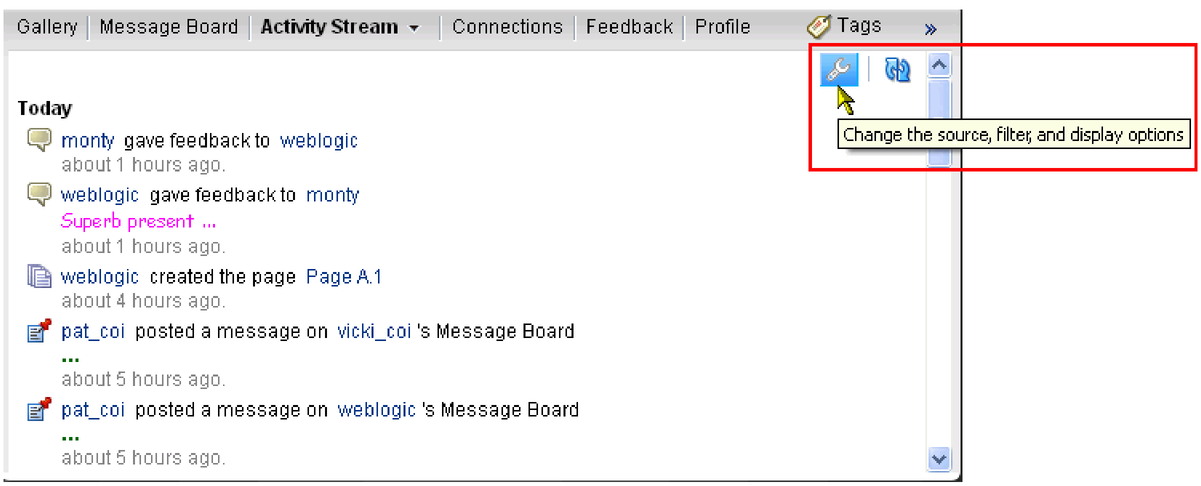
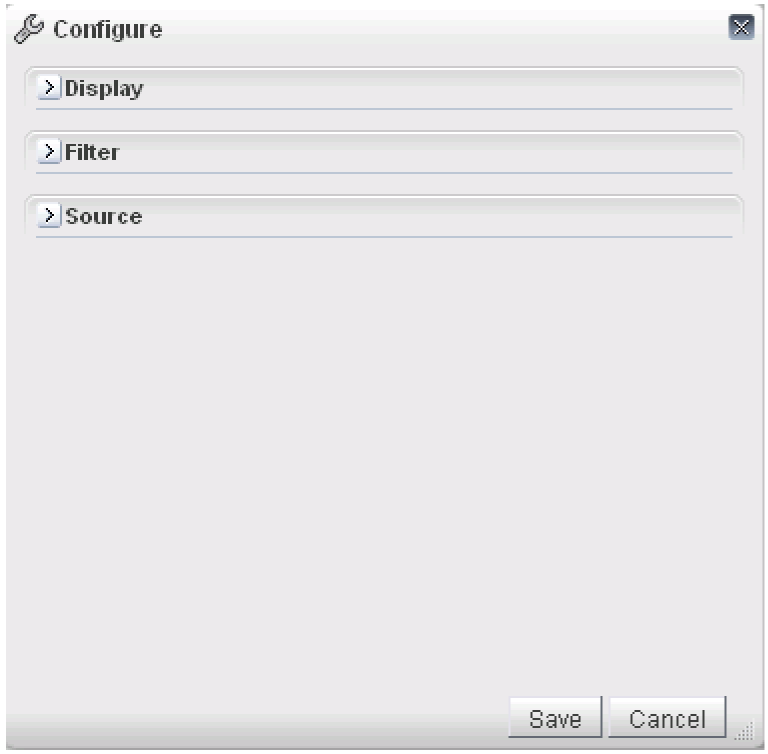


Figure 25–72 Activity Stream Configure Dialog



4. Set values for the individual task flow instance as described in Section 3.8.1, "Setting Activity Stream Preferences."
5. Click **Save**.

   If you entered these values in page view mode, they affect only your view of the task flow instance. If you entered these values in page edit mode, they affected all users' views of this task flow instance.

25.2.6.2 Specifying which Users to Show in an Activity Stream Task Flow Instance

Advanced users with page edit privileges can set two properties on an Activity Stream task flow to identify the users from whom to display activities in the task flow instance:

- Use the `Show User Activities` property to specify the display of activities from the current user in the task flow instance.
- Use the `Show Connections Activities` property to specify the display of activities from the current user's connections in the task flow instance.

> **Note:** Setting task flow properties affects every users' view of the task flow instance.

To specify which users to show in an Activity Stream task flow instance:

1. Edit the task flow instance's properties as described in Section 10.4.2, "Setting Component Properties."
2. In the Component Properties dialog, click the **Parameters** tab to bring it forward.

3. To show the current user's activities in the task flow instance, set the `Show User Activities` parameter to `true`.
4. To show the current user's connections' activities in the task flow instance, set the `Show Connections Activities` parameter to `true`.
5. When you finish revising component properties, click **OK**.
6. Save your changes, and exit Oracle Composer.

25.2.6.3 Summarizing Activity Stream Entries in a Task Flow Instance

Advanced users with page edit privileges can use a property on an Activity Stream task flow instance to specify that multiple activities originating from the same user should be summarized.

For example, if there are two activities:

- `Monty created the event Event1.`
- `Monty created the event Event2.`

Set the property `Show Summarized View` to `true` to summarize these into one notification in the Activity Stream: `Monty created the events Event1 and Event2.`

If more than three activities are summarized, a number is shown in lieu of a listing of individual activity names, for example: `Monty created 4 events.`

> **Note:** Setting task flow properties affects every users' view of the task flow instance.

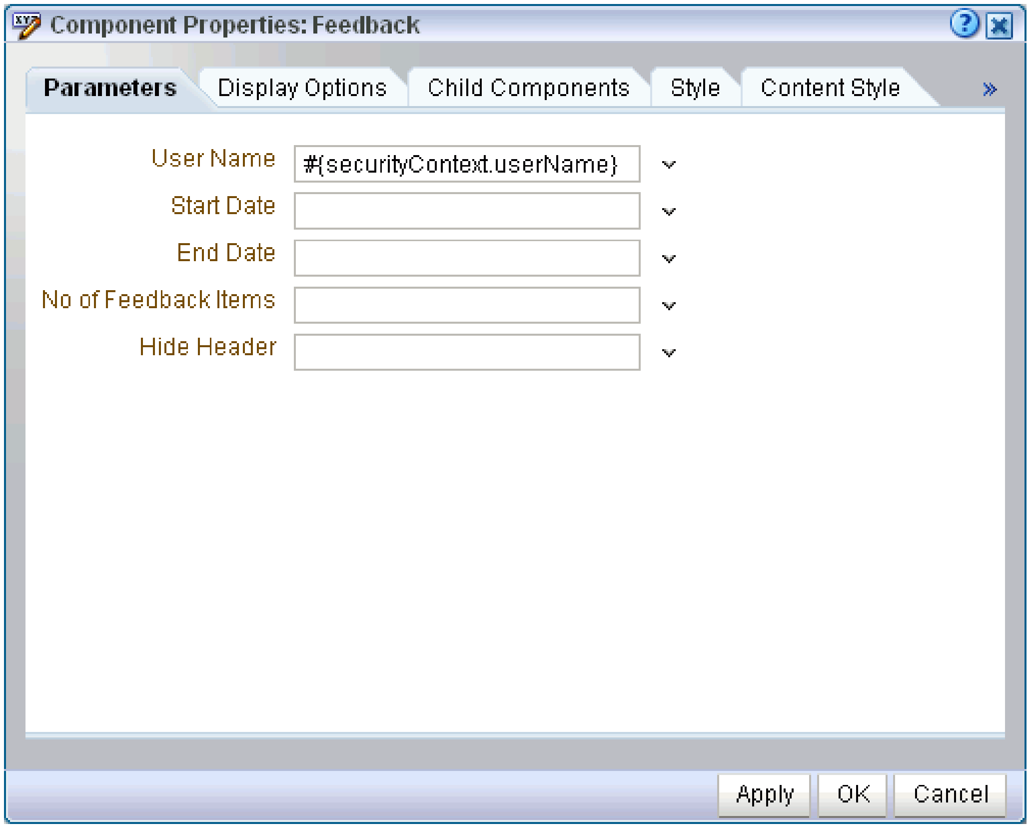
To summarize Activity Stream entries in a task flow instance:

1. Edit the task flow instance's properties as described in Section 10.4.2, "Setting Component Properties."
2. In the Component Properties dialog, click the **Parameters** tab to bring it forward.
3. Set the `Show Summarized View` parameter to `true`.
4. When you finish revising component properties, click **OK**.
5. Save your changes, and exit Oracle Composer.

25.3 Setting People Connections Service Task Flow Properties

The People Connections service task flows have associated properties, which users with sufficient privileges can access through the Component Properties dialog in Oracle Composer (Figure 25–73). Many properties are common to all task flows, and the method for accessing task flow properties is the same from task flow to task flow. Common task flow properties and how to access them are discussed in Section 10.4, "Setting Properties on Page Content."

Figure 25–73 People Connections Service Task Flow Component Properties



The properties on the **Parameters** tab of the Component Properties dialog control the default task flow content and facilitate the wiring of the task flow to page parameters and page definition variables. These properties are unique to the task flow type. For information about wiring pages and components, see Chapter 11, "Wiring Pages, Task Flows, Portlets, and UI Components."

Changes to the properties on the **Display Options**, **Style**, and **Content Style** tabs affect the appearance and behavior of the task flow for all users. These properties are common to all task flows. For more information, see Section 10.4, "Setting Properties on Page Content."

The content of the **Events** tab depends on the events supported by the task flow. For more information, see Section 10.4.8, "Working with Component Contextual Events."

The **Child Components** tab displays all of the components contained within the current component. It provides controls for rearranging, showing, and hiding child components. Not all components contain children. So you may find this tab devoid of content. For more information, see Section 10.4.6, "Working with Child Components."

All properties on the **Parameters** and **Display Options** tabs provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the **Edit** icon next to a property field to open the editor. For more information about using the editor and for descriptions of common EL expressions, see Section 10.4.5, "Using Expression Language (EL) Expressions with Component Properties."

Table 25–3 describes the properties that are unique to the People Connections service task flows.

Table 25–3 People Connections Service Task Flow Properties: Parameters Tab

Property	Description
`Allow photo upload`	A Boolean value representing whether a control is available on the task flow for uploading a profile photo Enter either `true` or `false`. This parameter appears in the component properties for the Profile – Snapshot task flow.
`Allow Remove`	A Boolean value representing whether a control is available on the task flow for removing a connection Enter either `true` or `false`. This parameter appears in the component properties for the Connections – Card task flow.
`Allow status update`	A Boolean value representing whether a control is available on the task flow for updating a profile status message Enter either `true` or `false`. This parameter appears in the component properties for the Profile – Snapshot task flow.
`Connection List Name`	The name of a grouped list of connections Use this parameter to limit the display of connections to those on the specified connections list. This parameter appears in the component properties for the Connections – Card task flow.
`End Date`	The ending date for a date range within which to show feedback messages Use the format `YYY/MM/DD`. Use this parameter with `Start Date`. This parameter appears in the component properties for the following task flows: ■ Feedback ■ Feedback – Quick View ■ Message Board
`Feedback items display size`	The number of characters to show for each feedback message Messages exceeding the specified value are truncated. This parameter appears in the component properties for the Feedback – Quick View task flow.
`Hide Actions`	A means of hiding the actions normally associated with a Feedback or Message Board entry, such as Edit, Hide, and Delete ■ Enter `true` to hide actions associated with a Feedback or Message Board entry. ■ Enter `false` to show such actions. When no value is entered, `false` is the default. This parameter appears in the component properties for the following task flows: ■ Feedback – Quick View ■ Message Board – Quick View

Table 25–3 (Cont.) People Connections Service Task Flow Properties: Parameters Tab

Property	Description
`Hide Configuration Button`	A Boolean value representing whether a control is available on the task flow for configuring Filter, Source, and Display options Enter either `true` or `false`. This parameter appears in the component properties for the Activity Stream task flow.
`Hide Footer`	A Boolean value representing whether to hide the task flow footer This parameter turns the **More** link on (`false`) or off (`true`). Note that it does not affect the **Previous** and **Next** links that may also display toward the bottom of the task flow. Enter either `true` or `false`. ■ `true`—Hide the task flow footer. ■ `false`—Show the task flow footer. This parameter appears in the component properties for the following task flows: ■ Connections – Card ■ Connections – Quick View ■ Feedback – Quick View ■ Message Board – Quick View
`Hide Header`	A Boolean value representing whether to hide the task flow header Enter either `true` or `false`. ■ `true`—Hide the task flow header. ■ `false`—Show the task flow header. This parameter appears in the component properties for the following task flows: ■ Activity Stream ■ Connections – Quick View ■ Feedback ■ Feedback – Quick View ■ Message Board ■ Message Board – Quick View
`Image Size`	The size of the Profile photo to show Values can be one of: `ORIGINAL`, `LARGE`, `MEDIUM`, `SMALL`. This parameter appears in the component properties for the Profile – Snapshot task flow.
`No of columns`	The number of columns to show in the task flow For example, in the Connections – Card task flow with six connections to show, a value of `2` means those connections are shown in two columns with three rows (see also `No of rows` and `No of Connections`). This parameter appears in the component properties for the following task flows: ■ Connections – Card ■ Connections – Quick View

Table 25–3 (Cont.) People Connections Service Task Flow Properties: Parameters Tab

Property	Description
`No of Connections`	A number representing the maximum number of connections to show in the task flow For example, enter `5` to specify that a maximum of five connections can appear in the task flow. A **More** link appears at the bottom of the task flow when there are more connections than the specified number of connections. Users click More to open the main view of the task flow where all connections are shown. This value is honored only when both `No of rows` and `No of columns` have not both been specified. If they have both been specified, then **Previous** and **Next** buttons appear when there are more connections than can fit into the grid. Subsequently, all connections can be viewed using **Previous** and **Next**. This parameter appears in the component properties for the following task flows: ■ Connections – Card ■ Connections – Quick View
`No of feedback items`	The number of Feedback items to show in the task flow For example, enter `5` to specify that a maximum of five items can appear in the task flow. In quick view, a **More** link appears at the bottom of the task flow when there are more items than the specified number of items. Users click **More** to open the main view of the task flow where all items are accessible. In main view, **Previous** and **Next** links are shown. Users click these to page through entries. This parameter appears in the component properties for the following task flows: ■ Feedback ■ Feedback – Quick View
`No of Messages`	The number of messages to show in the task flow For example, enter `5` to specify that a maximum of five items can appear in the task flow. In quick view, a **More** link appears at the bottom of the task flow when there are more items than the specified number of items. Users click **More** to open the main view of the task flow where all items are accessible. In main view, **Previous** and **Next** links are shown. Users click these to page through entries. This parameter appears in the component properties for the following task flows: ■ Message Board ■ Message Board – Quick View

Table 25–3 (Cont.) People Connections Service Task Flow Properties: Parameters Tab

Property	Description
`No of rows`	The number of rows to show in the task flow For example, in the Connections – Card task flow with six connections to show and a value of `2` for `No of Columns`, a value of `2` for `No of Rows` means connections are shown in two columns with two rows. That is, four connections are shown. A **More** link appears at the bottom of the task flow when there are more connections than can fit in the specified number of columns and rows. Users click More to open the main view of the task flow where all connections are shown. (See also, `No of Connections` and `No of columns`.) This parameter appears in the component properties for the following task flows: ■ Connections – Card ■ Connections – Quick View
`Profile Format`	The layout style for the task flow Enter one of the following: ■ `vcard`—Displays each connection in a virtual business card and includes the connection's user name and status message and quick-access buttons for interacting with your connections. ■ `iconic`—Displays the connection's personal profile photo and user name. ■ `list`—Displays connections in a list, showing the personal profile photo, user name, information about recent profile updates, and quick-access buttons for interacting with your connections. This parameter appears in the component properties for the Connections – Card task flow.
`Search String`	A value to act as a filter against task flow content For example, to show only those connections with a user name that includes the term *pat* (including *patrick* or *sripathy*), enter `pat` in the **Filter Pattern** field. This parameter appears in the component properties for the Connections – Card task flow.
`Show Connections Activities`	A way to allow or omit the display of connection activities in a user's view of the Activity Stream ■ Enter `true` to show the activities of the user's connections in his or her Activity Stream. If a value is not specified, `true` is the default. ■ Enter `false` to omit showing the current user's activities in his or her Activity Stream. This parameter appears in the component properties for the Activity Stream task flow.

Table 25–3 (Cont.) People Connections Service Task Flow Properties: Parameters Tab

Property	Description

`Show Summarized View`	A value for summarizing notifications in an Activity Stream
	■ Enter `true` to provide a summary view of the actions performed on a given object.
	For example, if there are two activities:
	`Monty created the event Event1.`
	`Monty created the event Event2.`
	A value of `true` summarizes these into one notification in the Activity Stream: `Monty created the events Event1 and Event2.`
	If more than three activities are summarized, a number is shown in lieu of a listing of individual activity names, for example: `Monty created 4 events.`
	■ Enter `false` to list each action on a given object individually. If a value is not specified, `false` is the default.
	This parameter appears in the component properties for the Activity Stream task flow.

`Show User Activities`	A means of including or excluding the current user's activities from the Activity Stream ■ Enter `true` to include the activities of the current user. If no value is specified, `true` is the default. ■ Enter `false` to exclude such activities This parameter appears in the component properties for the Activity Stream task flow.
`Sort Criteria`	The connections sort order Enter `LAST_ACTIVITY_TIME` to sort connections in descending date/time order. Leave blank to sort alphabetically by name. This parameter appears in the component properties for the Connections – Card task flow.
`Start Date`	The starting date for a date range within which to show feedback messages Use the format `YYYY/MM/DD`. Use this parameter with `End Date`. This parameter appears in the component properties for the following task flows: ■ Feedback ■ Feedback – Quick View ■ Message Board
`User Name`	The ID of the user to show in the task flow This value is set automatically (`#{securityContext.userName}`). Do not edit this value. This parameter appears in the component properties for all People Connections task flows.

26

Working with the RSS Service

This chapter describes how to use the RSS service features. The RSS service provides the ability to publish content from Oracle WebCenter services 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, the RSS service enables you to view news feeds from external sources on your application pages in an RSS Viewer.

This chapter includes the following sections:

Audience

This chapter is intended for WebCenter Spaces users interested in publishing news feeds from WebCenter Services and external sources on their application pages. Much of this information also applies to custom WebCenter applications, though it is written with WebCenter Spaces users in mind. (For information about custom WebCenter applications, see "Integrating the RSS Service" in *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter*.

The WebCenter Spaces application administrator has the authority to expose or hide task flows from a particular service. Tasks discussed in this chapter are not available to you if the relevant service is hidden.

For information about WebCenter Spaces seeded user roles, see *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter*.

26.1 What You Should Know About the RSS Service

The RSS service exposes its features in three ways:

- The RSS icon on a service task flow enables you to publish content from WebCenter services as a news feed.
- A dedicated RSS page (WebCenter Spaces only) displays a list of published feeds from all accessible group spaces for viewing in either RSS 2.0 or Atom 1.0 news readers.
- The RSS task flow adds an RSS viewer to the page for displaying feeds from external sources and WebCenter services.

Note: The RSS service does not support non-ASCII user names and passwords if the character encoding of the browser-based basic authentication is different from the character encoding of the system on which Oracle WebCenter is deployed. On a Linux system, the character encoding is generally different, and therefore the RSS service does not support non-ASCII credentials.

If the character encoding is same, then users can use corresponding non-ASCII credentials. For example, for the Oracle WebCenter instance installed on French Windows Server 2003, users can use a French user name on the French Windows to pass the basic authentication using Internet Explorer.

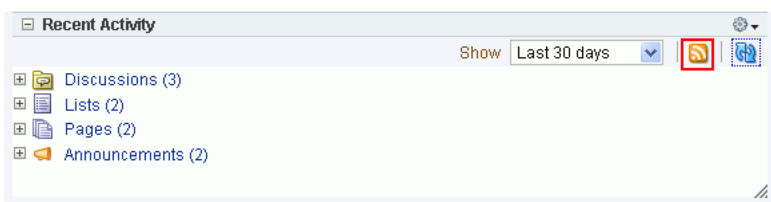
This section contains the following subsections:

- Section 26.1.1, "RSS Icon"
- Section 26.1.2, "RSS Task Flow"

26.1.1 RSS Icon

RSS news feeds deliver content update information on the Recent Activities, Discussions, Lists, and Announcements services. Figure 26–1 shows the **RSS** icon available on a Recent Activity task flow in a WebCenter Spaces page.

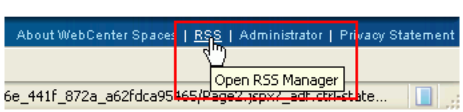
Figure 26–1 RSS Icon on a Recent Activity Task Flow



Note: When you click the RSS icon in WebCenter Spaces, if SSO is not configured, a Login dialog prompts for your user name and password. The user name that you enter must contain only ASCII characters.

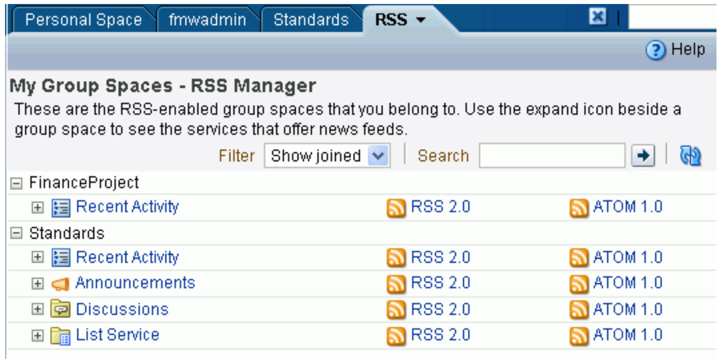
In a WebCenter Spaces application, you can obtain news feeds from individual task flow instances and also from the **RSS Manager**. Access the RSS Manager by clicking the **RSS** link at the bottom of the application (Figure 26–2).

Figure 26–2 The RSS Link in the WebCenter Spaces Application



The RSS Manager displays nodes for all the group spaces that have enabled RSS feeds to be published (Figure 26–3).

Figure 26–3 Expanded Group Space Nodes in the RSS Manager



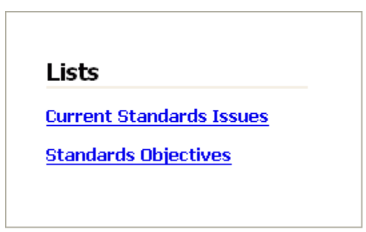
Expand a group space node to obtain both RSS 1.0 and Atom 2.0 news feeds from individual services.

A group space must be news feed-enabled before you can obtain feed URLs from it. For information, see Section 14.3.5, "Enabling or Disabling RSS News Feeds for a Group Space". 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 your WebCenter application. Because the application 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.

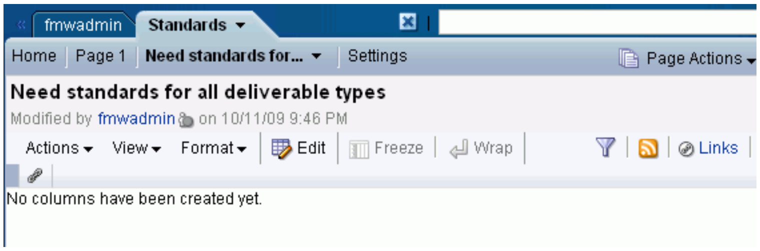
The level of detail provided through a service news feed depends on the feed source. For example, when you pull a news feed for recently added or modified lists, your news reader provides the list titles and (if provided) list descriptions of the most recently added or modified lists (Figure 26–4).

Figure 26–4 A Group Space Lists News Feed



The list titles in a feed are linked. Click a list title, and it takes you back into your WebCenter application with the selected list displayed as a top-level tab (Figure 26–5).

Figure 26–5 A List Opened from an RSS Feed and Displayed as a Top-Level Tab in WebCenter Spaces



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 (Figure 26–6).

Figure 26–6 List Details in an RSS Feed

When you click such a link, it also takes you back into your WebCenter application, with the list displayed as a top-level tab (see Figure 26–5).

The news feeds you obtain from a WebCenter Spaces application are context-aware, providing content only from the space from which they originate. For example, if you provide a list feed from the *Finance* group space, then your news reader displays list content that is unique to the *Finance* group space. If you add a list feed from the *Languages* group space, then your news reader displays list content that is unique to the *Languages* group space.

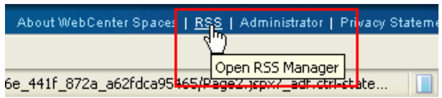
Additionally, you can grab a news feed URL from a Recent Activity list located in your personal space. That RSS feed can provide new and updated news from a particular group space.

In WebCenter Spaces, you can obtain news feed URLs for all applicable services from two locations:

- The RSS Manager

Access the RSS Manager by clicking the **RSS** link at the bottom of the application (Figure 26–7)

Figure 26–7 The RSS Link in the WebCenter Spaces Application



- One or more of a service's task flows

  For example, Figure 26–8 illustrates an **RSS** icon in the toolbar of a Recent Activity list.

Figure 26–8 RSS Icon on a Recent Activity Task Flow

The RSS service delivers news feeds from four services:

- **Recent Activities service**

  The recent activity news feed tracks updates to your WebCenter application that are normally reflected in a Recent Activity list and that have occurred within the last three days. For more information, see Section 26.2.1, "Obtaining the Recent Activities News Feed."

- **Discussion Forums**

  The discussion forums news feed tracks updates to all discussion forums in a particular group space in the WebCenter Spaces application. See Section 26.2.2, "Obtaining the Discussion Forums News Feed."

- **Lists** (WebCenter Spaces only)

  There are two types of news feeds that can be delivered from the Lists service—all newly created or changed lists in a group space (from the List Manager task flow) and revisions to the data of a particular list in a group space (from the List Viewer task flow). The news feed content depends on whether you get the news feed URL from the List Manager task flow or from the List Viewer task flow. For more information, see Section 26.2.3, "Obtaining List News Feeds."

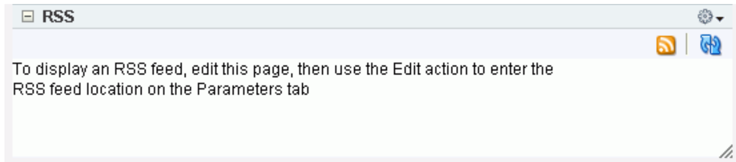
- **Announcements**

  The Announcements news feed tracks additions and revisions to announcements from a particular group space, from all group spaces, or application-wide, depending on the location of the feed source. For more information, see Section 26.2.4, "Obtaining an Announcements News Feed."

26.1.2 RSS Task Flow

If you want to add a news feed from an external site to your WebCenter application, the RSS service provides an RSS task flow (Figure 26–9) through the **Catalog** dialog in Edit mode of the page.

Figure 26–9 The RSS Task Flow



You can place the RSS task flow on a page and configure it to display content from any external RSS feed. Additionally, the RSS task flow supports login credential passing, by using an external application.

See Also:

- For information about adding the RSS task flow, see Section 26.3.1, "Adding an RSS Service Task Flow to a Page."
- For information about specifying a feed for the RSS task flow, see Section 26.3.2, "Editing Feed Information for an RSS Task Flow."

The RSS task flow can render news feeds outside of a corporate firewall. However, to consume external news feeds outside of the firewall, your application administrator must have configured proxies for the RSS service. Contact your application administrator if you cannot consume external feeds but want to do so. For more information, see Section 2.8, "Contacting Your Application Administrator".

Accessing External Applications

Every time you access a secure news feed item, you must log in 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 your WebCenter application. You can provide this capability for all frequently used external applications. For more information, see Section 4.5, "Working with External Applications."

If the secured application you want to access is not registered as an external application, then perform the steps listed in Section 3.6, "Providing Login Information for External Applications."

26.2 Obtaining Service News Feeds

Each participating service provides news feeds from locations unique to that service.

This section steps you through obtaining those feeds. It contains the following subsections:

- Section 26.2.1, "Obtaining the Recent Activities News Feed"
- Section 26.2.2, "Obtaining the Discussion Forums News Feed"
- Section 26.2.3, "Obtaining List News Feeds"
- Section 26.2.4, "Obtaining an Announcements News Feed"
- Section 26.2.5, "Obtaining WebCenter Blog RSS Feeds"

26.2.1 Obtaining the Recent Activities News Feed

Use news feeds from the Recent Activities service to keep track of the wide range of activity happening in one or more group spaces within the last three days. To consume a group space Recent Activities news feed, you must be a member of the selected group space and the group space must be enabled to provide news feeds.

WebCenter Spaces provides two locations for pulling a news feed from the Recent Activities service: the RSS Manager and the Recent Activity task flow.

Both the RSS Manager and the Recent Activity task flow provide the same news feed content: additions or revisions to group spaces and group space pages, documents, discussion forums, lists, and so on. For more information, see Chapter 27, "Working with the Recent Activities Service."

Assuming a default configuration, a news feed URL from a Recent Activity task flow in a group space provides information about the activity in that group space. A news feed URL from a Recent Activity task flow in your personal space provides information about the activities in a particular group space.

Note: A Recent Activity task flow can be configured to display the recent activity of a group space other than the one where it has been placed. In such a case, the news feed from that list provides information on the activities of the group space identified during configuration. For more information, see Section 27.3, "Setting Recent Activities Service Task Flow Properties."

This section describes how to obtain a news feed for the Recent Activity task flow from both the locations, the RSS Manager and the Recent Activity task flow. It contains the following subsections:

- Section 26.2.1.1, "Obtaining a Recent Activity News Feed URL from the RSS Manager"
- Section 26.2.1.2, "Obtaining a News Feed URL from the Recent Activity Task Flow"

26.2.1.1 Obtaining a Recent Activity News Feed URL from the RSS Manager

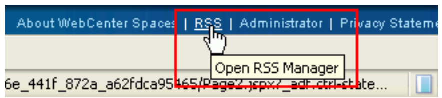
The RSS Manager provides news feeds for both RSS 2.0 and Atom 1.0 news readers. It lists all RSS-enabled group spaces of which you are a member. Each listed group space can be expanded to display the services for which it offers news feeds (Figure 26–10).

Figure 26–10 The Recent Activity Service under a Group Space in the RSS Manager

To obtain a Recent Activity list news feed URL from the RSS Manager:

1. Log in, click the **RSS** link at the bottom of the WebCenter Spaces application (Figure 26–11).

Figure 26–11 The RSS Link



2. If required, expand the node of the group space for which you want to monitor recent activities.

   You can expand a group space node by clicking the **Expand** icon, as shown in Figure 26–12, or by right-clicking the group space name and selecting the **Expand** option from the resulting context menu.

Figure 26–12 Expand Icon in RSS Manager

3. Under the relevant group space, right-click the **RSS 2.0** or **Atom 1.0** icon next to the Recent Activity list you want to monitor, 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 Spaces credentials. For more information, see Section 26.1, "What You Should Know About the RSS Service."

26.2.1.2 Obtaining a News Feed URL from the Recent Activity Task Flow

The Recent Activity task flow 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 such things as 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 task flow, you must be a member of the group space from which you want to obtain the news feed and news feeds must be enabled for the relevant group space.

To obtain a Recent Activity list news feed URL from the Recent Activity list:

1. Log in, and go to your personal space or the group space that contains the Recent Activity list from which you want to obtain an RSS feed.

   For information about navigating to a group space, see Section 2.5.4, "Opening Group Spaces." Typically, your personal space tab is always on view. If necessary, click the **Personal Space** tab to bring it forward. A group space may be configured to display in full-screen mode. For more information, see Section 13.8.5, "Applying a Group Space Site Template."

2. Right-click the **RSS** icon in the toolbar of the Recent Activity list (Figure 26–13), and, from the resulting context menu, select the copy-link command.

Figure 26–13 The RSS Icon on the Recent Activity Task Flow

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**.

Alternatively, drag the **RSS** icon onto your news reader of choice. This may allow you to skip the other steps in this procedure. If you use the drag-and-drop method, you may have to enter your WebCenter Spaces credentials. For more information, see Section 26.1, "What You Should Know About the RSS Service."

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 task flow 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. For more information, see Section 26.2.1.1, "Obtaining a Recent Activity News Feed URL from the RSS Manager."

You may need to enter your WebCenter Spaces credentials. For more information, see Section 26.1, "What You Should Know About the RSS Service."

26.2.2 Obtaining the Discussion Forums News Feed

Use Discussion Forum news feeds to keep track of additions and revisions to a selected group space's discussions. There are three locations from which to obtain discussion forums news feed URLs: in the RSS Manager, on the Discussions page, and from a Discussion Forum Manager task flow. All discussion RSS and Atom URLs provide the same feed; that is, additions and revisions to all discussions in a selected group space.

This section contains the following subsections:

- Section 26.2.2.1, "Obtaining a Discussion Forum News Feed from the RSS Manager"
- Section 26.2.2.2, "Obtaining a News Feed from the Discussions Page"

- Section 26.2.2.3, "Obtaining a News Feed from a Discussion Forum Manager Task Flow"

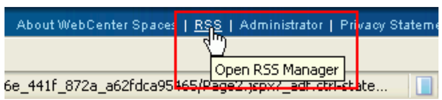
26.2.2.1 Obtaining a Discussion Forum News Feed from the RSS Manager

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 group space of which you are a member. Use discussion forum news feeds to track additions and revisions to a selected group space's discussion forums.

To obtain a discussion forum news feed URL from the RSS Manager:

1. Log in, and click the **RSS** link at the bottom of the WebCenter Spaces application (Figure 26–14).

Figure 26–14 The RSS Link



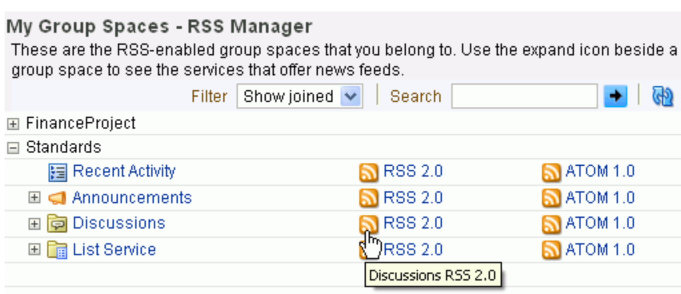
2. In RSS Manager, if required, expand the node of the group space that contains the discussions you want to use as a news feed.

   You can expand a group space node by clicking the **Expand** icon to the left of it or by right-clicking the group space 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 26–15), 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 26–15 RSS and Atom Icons Next to a Discussions Node in the RSS Manager



   Alternatively, if you drag the **RSS** icon onto a news reader you can skip most of the other steps. You may need to enter your WebCenter Spaces credentials. For more information, see Section 26.1, "What You Should Know About the RSS Service."

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 Spaces credentials. For more information, see Section 26.1, "What You Should Know About the RSS Service."

26.2.2.2 Obtaining a News Feed from the Discussions Page

The **Discussions** page provides a convenient location for grabbing a news feed URL while monitoring discussions.

To get an RSS URL for all of a selected group space's discussions from the Discussions page:

1. Log in, and go to the group space that contains the discussion forums you want to use as an RSS feed.

   For information about navigating to a group space, see Section 2.5.4, "Opening Group Spaces." For information about showing hidden pages, see Section 2.5.3, "Showing Hidden Pages."

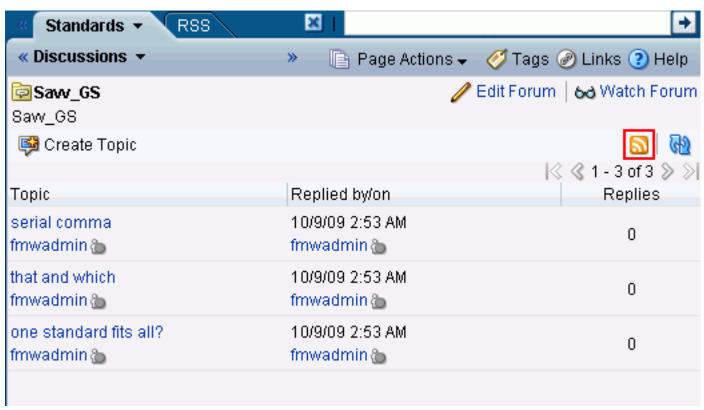
2. Click the **Discussions** tab to bring the **Discussions** page forward.

   If the **Discussions** tab is not available, open the Manage Pages dialog and select the **Discussions** page for display. When the tab opens, click it to bring the page forward. For more information about locating and opening pages, see Section 2.5, "Hiding, Showing, Opening, and Closing Pages."

3. Right-click the **RSS** icon on the **Discussions** page (Figure 26–16), 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 26–16 An RSS Icon on a Discussions Page



   Alternatively, if you drag the **RSS** icon onto your news reader you can skip most of the other steps. You may need to enter your WebCenter Spaces credentials. For more information, see Section 26.1, "What You Should Know About the RSS Service."

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 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. For more information, see Section 26.2.2.1, "Obtaining a Discussion Forum News Feed from the RSS Manager."

You may need to enter your WebCenter Spaces credentials. To learn more, see Section 26.1, "What You Should Know About the RSS Service."

26.2.2.3 Obtaining a News Feed from a Discussion Forum Manager Task Flow

The Discussion Forum Manager task flow provides another location from which you can obtain a discussions news feed for a selected group space. The placement of this task flow within a group space is at the discretion of the space's designers, so we cannot pinpoint where you may find this task flow. But, wherever you find it, an **RSS** icon is also 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 Forum Manager task flow:

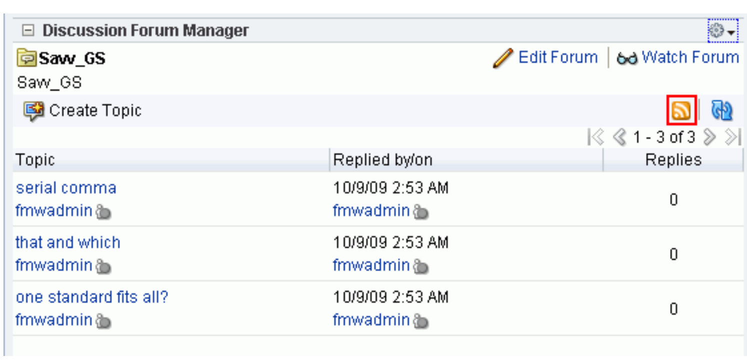
1. Log in, and go to the page in the required group space that contains a Discussion Forum Manager task flow.

   For information about navigating to a group space, see Section 2.5.4, "Opening Group Spaces." For information about showing hidden pages, see Section 2.5.3, "Showing Hidden Pages."

2. Right-click the **RSS** icon on the task flow (Figure 26–17), 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 26–17 An RSS Icon in a Discussion Forum Manager Task Flow



Alternatively, if you drag the **RSS** icon onto your news reader you can skip most of the other steps. You may need to enter your WebCenter Spaces credentials. For more information, see Section 26.1, "What You Should Know About the RSS Service."

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 task flow 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. For more information, see Section 26.2.2.1, "Obtaining a Discussion Forum News Feed from the RSS Manager."

   You may need to enter your WebCenter Spaces credentials. For more information, see Section 26.1, "What You Should Know About the RSS Service."

26.2.3 Obtaining List News Feeds

Lists provide a vital form of tracking 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.

The Lists service provides two options for keeping track of changes through a news reader:

- Keep track of all recently added or modified lists in a given group space.
- Keep track of recently added or modified data rows in one list.

You can obtain the news feed URL for lists from three locations: the RSS Manager, the Lists page, and any Lists task flow on a given page. The RSS Manager and the Lists page provide access to both types of Lists feeds. Individual List task flows 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 group space. It contains the following subsections:

- Section 26.2.3.1, "Obtaining a List News Feed from the RSS Manager"
- Section 26.2.3.2, "Obtaining a News Feed from the Lists Page"
- Section 26.2.3.3, "Obtaining a News Feed from a List Task Flow"

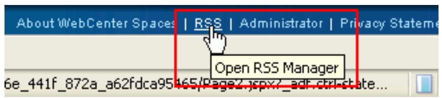
26.2.3.1 Obtaining a List News Feed from the RSS Manager

The RSS Manager provides two types of list news feeds: a feed of recently added or revised lists in a group space 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 26.1, "What You Should Know About the RSS Service").

To obtain a list news feed from the RSS Manager:

1. Log in, and click the **RSS** button at the bottom of the WebCenter Spaces application (Figure 26–18).

Figure 26–18 The RSS Link



2. In the **RSS Manager**, expand the node for the group space that contains the lists from which to obtain an RSS feed.

   If you want to get a feed from a particular list, expand the **List Service** node.

3. Right-click the **RSS 2.0** or **Atom 1.0** icon next to **List Service** for all lists or next to a selected list (Figure 26–19), 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 26–19 The Lists Service Node on the RSS Page

   Alternatively, if you drag the news feed icon onto your reader you can skip most of the other steps. You may need to enter your WebCenter Spaces credentials. For more information, see Section 26.1, "What You Should Know About the RSS Service."

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 Spaces credentials. For more information, see Section 26.1, "What You Should Know About the RSS Service."

26.2.3.2 Obtaining a News Feed from the Lists Page

Each group space has its own **Lists** page, where lists are born. Each **Lists** page 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.

This section describes how to obtain news feed URLs from the **Lists** page. 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. For more information, see Section 26.2.3.1, "Obtaining a List News Feed from the RSS Manager."

To obtain a news feed from the **Lists** page:

1. Log in, and go to the group space that contains the list you want to track.

   For information about navigating to a group space, see Section 2.5.4, "Opening Group Spaces." For information about showing hidden pages, see Section 2.5.3, "Showing Hidden Pages."

2. Click the **Lists** tab to bring the **Lists** page forward.

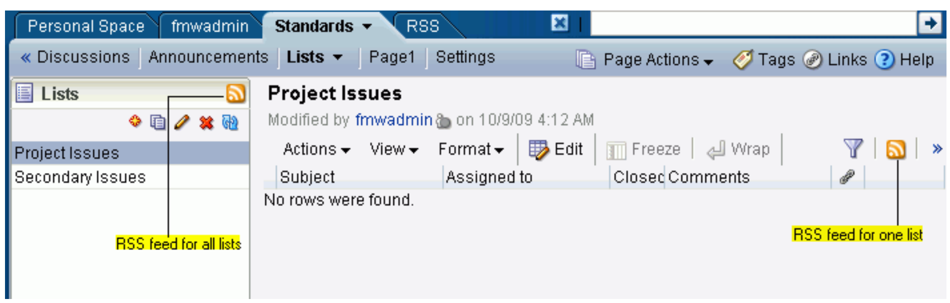
   If the **Lists** tab is not available, open the Manage Pages dialog and select the **Lists** page for display. For more information, see Section 2.5, "Hiding, Showing, Opening, and Closing Pages."

3. To obtain a news feed of recently added and revised lists in a group space, right-click the **RSS** icon in the **Lists** pane on the left side of the **Lists** page (Figure 26–20), and select the copy-link command from the resulting context menu.

   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 26–20). Right-click the **RSS** icon that appears above the list, and select the copy-link command from the resulting context menu.

   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 26–20 Selecting a List on the Lists Page



   Alternatively, if you drag the news feed icon onto your reader you can skip most of the other steps. You may need to enter your WebCenter Spaces credentials. For more information, see Section 26.1, "What You Should Know About the RSS Service."

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. For more information, see Section 26.2.3.1, "Obtaining a List News Feed from the RSS Manager."

You may need to enter your WebCenter Spaces credentials. For more information, see Section 26.1, "What You Should Know About the RSS Service."

26.2.3.3 Obtaining a News Feed from a List Task Flow

As you navigate through group space pages in your WebCenter Spaces application, 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 task flow comes with its own RSS news feed, making it easy to subscribe to the list on-the-spot. This section tells you how.

To obtain a news feed from a List task flow:

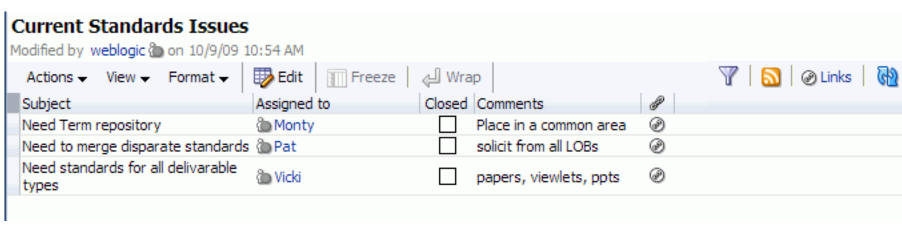
1. Log in, go to the group space that contains the List you want to track.

   For information about navigating to a group space, see Section 2.5.4, "Opening Group Spaces." For information about showing hidden pages, see Section 2.5.3, "Showing Hidden Pages."

2. Right-click the **RSS** icon at the top-right of the List task flow (Figure 26–21), 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 26–21 A List Task Flow

   Alternatively, if you drag the **RSS** icon onto your news reader you can skip most of the other steps. You may need to enter your WebCenter Spaces credentials. For more information, see Section 26.1, "What You Should Know About the RSS Service."

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 task flow 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. For more information, see Section 26.2.3.1, "Obtaining a List News Feed from the RSS Manager."

You may need to enter your WebCenter Spaces credentials. For more information, see Section 26.1, "What You Should Know About the RSS Service."

26.2.4 Obtaining an 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 group spaces, 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, and an Announcements task flow.

This section contains the following subsections:

- Section 26.2.4.1, "Obtaining an Announcements News Feed from the RSS Manager"
- Section 26.2.4.2, "Obtaining a News Feed from the Announcements Page"
- Section 26.2.4.3, "Obtaining a News Feed from an Announcements Task Flow"

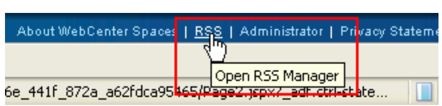
26.2.4.1 Obtaining an Announcements News Feed from the RSS Manager

The RSS Manager provides two types of feeds for the Announcements service: RSS 2.0 and Atom 1.0. Use either of these to keep track of all new and revised announcements in a particular group space.

To obtain an Announcements news feed from the RSS Manager:

1. Log in, and click the **RSS** link at the bottom of the WebCenter Spaces application (Figure 26–22).

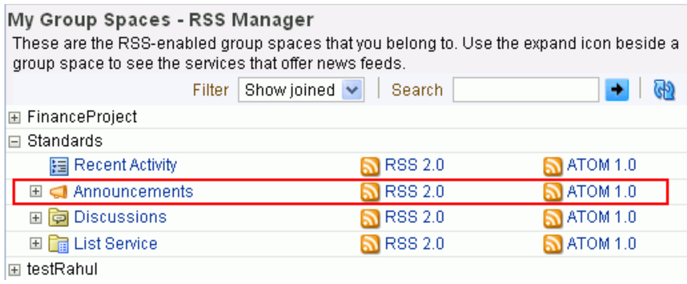
Figure 26–22 The RSS Link



2. In the **RSS Manager**, expand the node for the group space that contains the announcements you want to track through a news reader.
3. Right-click the **RSS 2.0** or **Atom 1.0** icon next to **Announcements** (Figure 26–19), 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 26–23 Announcements Node on the RSS Page



Alternatively, if you drag the news feed icon onto your reader you can skip most of the other steps. You may need to enter your WebCenter Spaces credentials. For more information, see Section 26.1, "What You Should Know About the RSS Service."

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 Spaces credentials. For more information, see Section 26.1, "What You Should Know About the RSS Service."

26.2.4.2 Obtaining a News Feed from the Announcements Page

The Announcements service provides an Announcement Manager task flow, which is exposed from the main Announcements page in the WebCenter Spaces application. You can use this task flow to create and revise announcements and to obtain an announcements news feed URL.

Unlike the RSS Manager, the Announcement Manager task flow 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 in lieu of the Announcement Manager task flow. For more information, see Section 26.2.4.1, "Obtaining an Announcements News Feed from the RSS Manager."

To obtain a news feed from the Announcement Manager task flow:

1. Log in, and click the **Announcements** tab to bring the **Announcements** page forward.

   If the **Announcements** tab is not available, click the Settings tab and then the Services tab, and select the **Announcements** page for display. When the tab appears on the page, click it to bring the page forward. For more information, see Section 2.5, "Hiding, Showing, Opening, and Closing Pages."

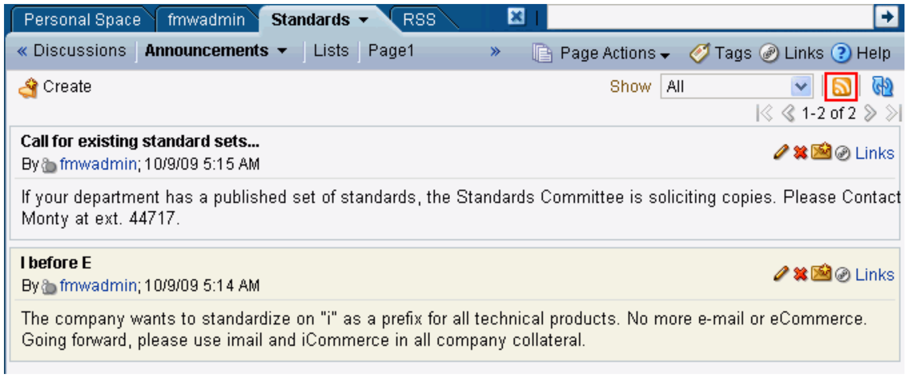
   Alternatively, click the **Open Announcement Manager** icon in the Announcements task flow to view the Announcement Manager task flow.

   > **Note:** The **Open Announcement Manager** icon is not displayed in the Announcements task flow if you do not have the required privileges.

2. Right-click the **RSS** icon on the right side of the **Announcements** page (Figure 26–24), and select the copy-link command from the resulting context menu.

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 26–24 The RSS Icon on the Announcements Page



Alternatively, if you drag the news feed icon onto your reader you can skip most of the other steps. You may need to enter your WebCenter Spaces credentials. For more information, see Section 26.1, "What You Should Know About the RSS Service."

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. For more information, see Section 26.2.4.1, "Obtaining an Announcements News Feed from the RSS Manager."

   You may require to enter your WebCenter Spaces credentials. For more information, see Section 26.1, "What You Should Know About the RSS Service."

26.2.4.3 Obtaining a News Feed from an Announcements Task Flow

The Announcements task flow also provides access to a news feed URL. Like the Announcements page, the task flow 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 in lieu of the Announcements task flow. For more information, see Section 26.2.4.1, "Obtaining an Announcements News Feed from the RSS Manager."

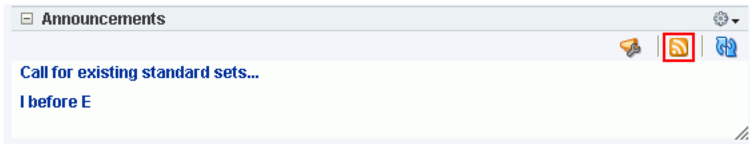
To obtain a news feed from an Announcements task flow:

1. Log in, and go to the page that contains the Announcements task flow you want to view.

2. Right-click the **RSS** icon on the Announcements task flow (Figure 26–25), and select the copy-link command from the resulting context menu.

   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 26–25 RSS Icon in an Announcements Task Flow

   Alternatively, if you drag the news feed icon onto your reader you can skip most of the other steps. You may require to enter your WebCenter Spaces credentials. For more information, see Section 26.1, "What You Should Know About the RSS Service."

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 task flow 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. For more information, see Section 26.2.4.1, "Obtaining an Announcements News Feed from the RSS Manager."

   You may require to enter your WebCenter Spaces credentials. For more information, see Section 26.1, "What You Should Know About the RSS Service."

26.2.5 Obtaining WebCenter Blog RSS Feeds

When you create a blog by using the Blog service, an RSS feed is created for the blog so that you can get blog updates in your RSS reader of choice. To support WebCenter blog RSS feeds, a WebCenter administrator needs to configure Oracle WebCenter Wiki and Blog Server for Basic Authentication, and create and configure an external application to store a user's login credentials for reading a secure RSS feed.

To view RSS feeds for a WebCenter blog, you must:

- Update the RSS Viewer task flow with the appropriate external application ID.
- Enter your credentials for the external application in Preferences > My Accounts. To access a secure news feed item, you must log in to that secure application to view content.

26.3 Working with the RSS Task Flow

The RSS task flow enables you to include an RSS viewer, which you can use to view content from external news feeds within your application page.

This section contains the following subsections:

- Section 26.3.1, "Adding an RSS Service Task Flow to a Page"
- Section 26.3.2, "Editing Feed Information for an RSS Task Flow"
- Section 26.3.3, "Refreshing an RSS Task Flow"
- Section 26.3.4, "Deleting an RSS Task Flow From the Page"

26.3.1 Adding an RSS Service Task Flow to a Page

You can incorporate news feeds from external sources into your application pages by using the RSS task flow. You can add the RSS task flow from the component catalog in Oracle Composer.

Each instance of the RSS viewer displays news feeds from one source. If you plan to display multiple external news feeds on a particular page, you can place multiple RSS task flows on that page.

To display content from an external RSS feed, proxies must be configured in your application. Contact your application administrator if you have problems accessing external RSS feeds in your task flow.

WebCenter applications provide the ability to store and manage your login credentials by using external applications. After your credentials for a particular application are stored, you are logged in to that application automatically when you log in to your WebCenter application.

So if an external RSS news feed or WebCenter services feed requires your login credentials, when you get to the step where you specify the feed URL, you may have to also specify the name of the external application that is configured to store your login credentials for reading the secure RSS feed.

For the steps to add an RSS service task flow to a page, see Section 10.1.4, "Adding Task Flows to a Page."

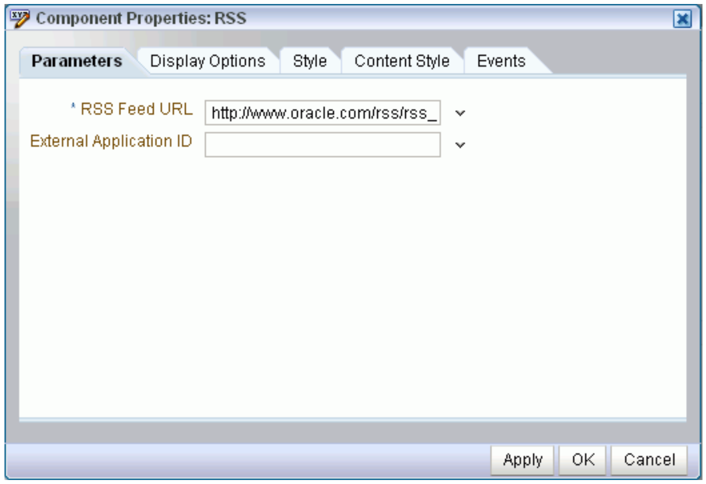
26.3.2 Editing Feed Information for an RSS Task Flow

You can change the feed URL or external application ID specified for an RSS task flow at any point of time.

To change the feed for the RSS task flow:

1. Go to the web site that provides the RSS feed you want to view through the RSS viewer, and then copy its RSS URL.
2. Log in to your WebCenter Spaces application, and go the page where you have placed the RSS task flow.
3. Switch to the page's Edit mode.
4. Click the **Edit** icon on the header of the RSS task flow.
5. In the **Component Properties** dialog, click the **Parameters** tab, if not open already. (Figure 26–26).

Figure 26–26 Properties of the WebCenter Spaces RSS Reader



6. In the **RSS Feed Location** field, paste the URL that you copied in step 1.

   For information about the RSS task flow parameters, see Section 26.4, "Setting RSS Service Task Flow Properties."

7. If the feed you want to publish requires authentication, then for **External Application Id** specify the name of the external application that is configured to store your login credentials for accessing that feed.

   For information about external applications, see "Accessing External Applications".

8. Click **Apply** in the Component Properties dialog to save your changes and remain in the dialog.

   Or click **OK** to save your changes and close the dialog.

   Content from the external feed you specified is displayed within the RSS task flow.

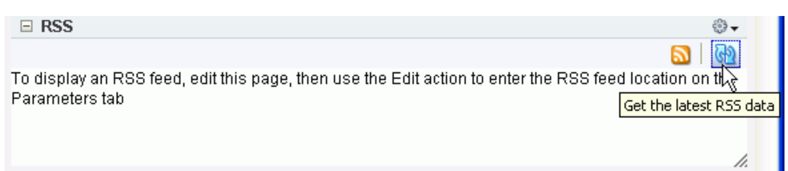
9. Click **Save** at the top-right corner of Oracle Composer to save your changes and remain in Oracle Composer.

10. Optionally, click **Close** to exit Oracle Composer.

26.3.3 Refreshing an RSS Task Flow

The RSS task flow, 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 the RSS task flow yourself by using the **Refresh** icon (Figure 26–27), when required.

Figure 26–27 The Refresh Icon on an RSS Task Flow



The task flow updates and displays latest data from the external source.

26.3.4 Deleting an RSS Task Flow From the Page

If you have the required privileges, you have the option to delete the RSS task flow from a page by using the **Remove** icon on the task flow (Figure 26–28) in Edit mode of the page.

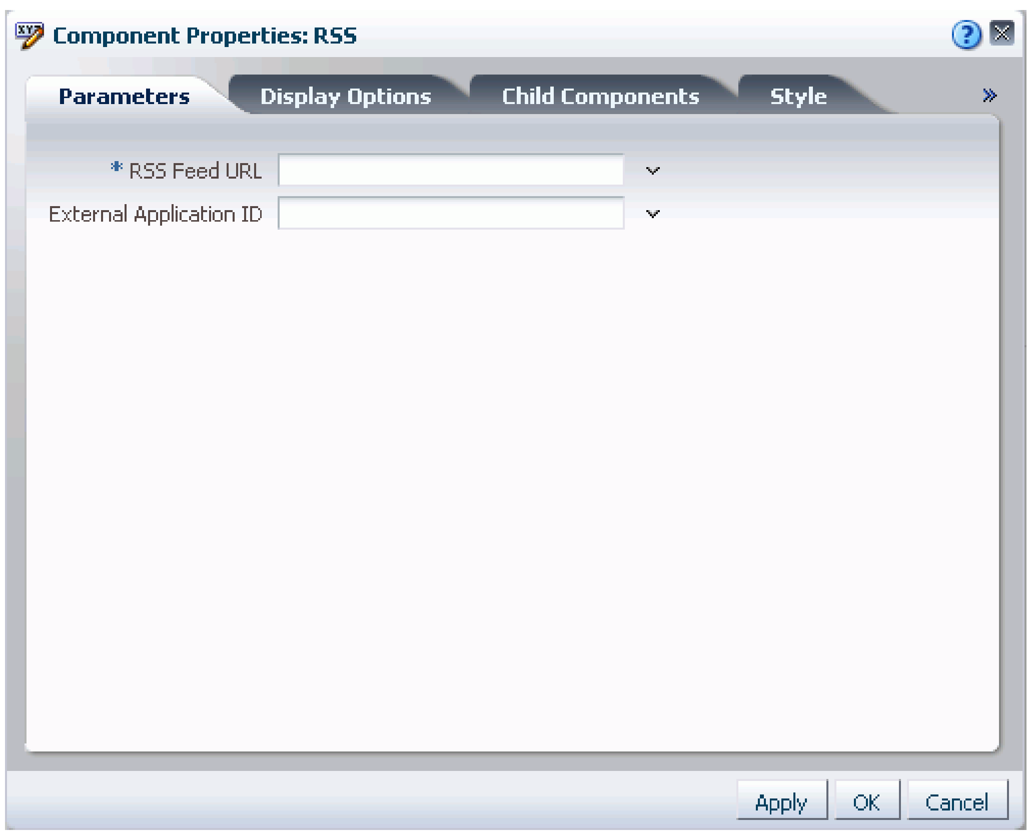
Figure 26–28 Remove Icon on an RSS Task Flow

When you click the **Remove** icon, the Delete Component dialog displays. Click **Delete** in this dialog to delete the task flow from the page.

26.4 Setting RSS Service Task Flow Properties

The RSS service task flow has associated properties, which users with sufficient privileges can access through the Component Properties dialog in Oracle Composer (Figure 26–29). Many properties are common to all task flows, and the method for accessing task flow properties is the same from task flow to task flow. Common task flow properties and how to access them are discussed in Section 10.4, "Setting Properties on Page Content."

Figure 26–29 RSS Task Flow Component Properties



The properties on the **Parameters** tab of the Component Properties dialog control the default task flow content and facilitate the wiring of the task flow to page parameters and page definition variables. These properties are unique to the task flow type. For more information, see Section 10.4.3, "Working with Component Parameters." For information about wiring pages and components, see Chapter 11, "Wiring Pages, Task Flows, Portlets, and UI Components."

Changes to the properties on the **Display Options**, **Style**, and **Content Style** tabs affect the appearance and behavior of the task flow for all users. These properties are common to all task flows. For more information, see Section 10.4.4, "Working with Component Display Options" and Section 10.4.7, "Working with Style and Content Style Properties."

The contents of the **Events** tab depend on the events supported by the task flow. For more information, see Section 10.4.8, "Working with Component Contextual Events."

The **Child Components** tab displays all of the components contained within the current component. It provides controls for rearranging, showing, and hiding child components. Not all components contain children. So you may find this tab devoid of content. For more information, see Section 10.4.6, "Working with Child Components."

All properties on the **Parameters** and **Display Options** tabs provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the **Edit** icon next to a property field to open the editor. For more information about using the editor and for descriptions of common EL expressions, see Section 10.4.5, "Using Expression Language (EL) Expressions with Component Properties."

Table 26–1 describes the properties that are unique to the RSS task flow.

Table 26–1 RSS Service Task Flow Properties: Parameters Tab

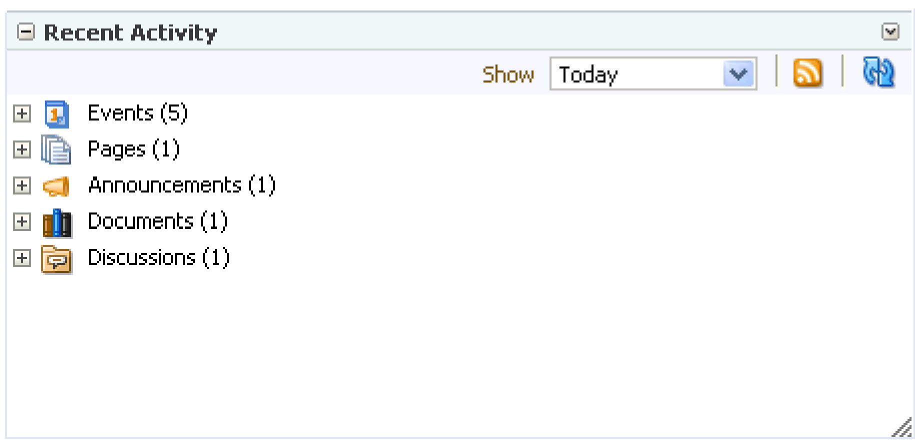
Property	Description
`RSS Feed URL`	The URL to access the RSS feed. For example, to use the Oracle Press Releases RSS feed, enter: `http://www.oracle.com/rss/rss_ocom_pr.xml`
`External Application ID`	The name of the external application that is configured to store a user's login credentials for reading a secure RSS feed. If you are not sure whether there is an external application configured to store your credentials, then contact your application administrator. For information about contacting your application administrator, see Section 2.8, "Contacting Your Application Administrator."

27

Working with the Recent Activities Service

The Recent Activities service provides a means of tracking recent activities within a WebCenter application. For example, the Recent Activity task flow tracks the changes you and other users make to application pages, documents, discussion forums, lists, and the like (Figure 27–1).

Figure 27–1 The Recent Activity Task Flow



This chapter provides information about the Recent Activities service. It contains the following sections:

- Section 27.1, "What You Should Know About the Recent Activities Service"
- Section 27.2, "Working with the Recent Activities Service Task Flow"
- Section 27.3, "Setting Recent Activities Service Task Flow Properties"

Note: You can track recent activities through your favorite RSS reader. For more information, see Chapter 26, "Working with the RSS Service."

Audience

This chapter is intended for users interested in understanding and using the features of the Recent Activities service. Much of this information also applies to custom WebCenter applications, though it is written with WebCenter Spaces users in mind. For information about custom WebCenter applications, see "Integrating the Recent Activities Service" in *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter*.

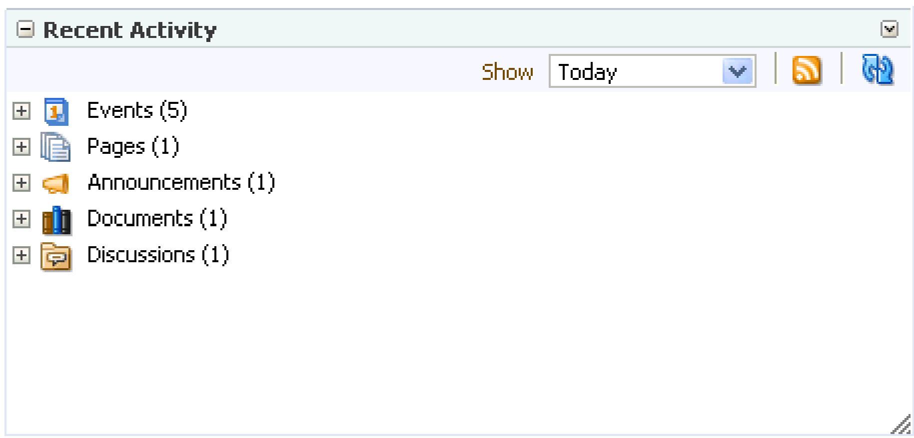
The WebCenter Spaces application administrator has the authority to expose or hide task flows from a particular service. Tasks discussed in this chapter are not available to you if the relevant service is hidden.

Note: For information about WebCenter Spaces seeded user roles, see *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter*.

27.1 What You Should Know About the Recent Activities Service

The Recent Activities service provides the Recent Activity task flow, which links to the additions and revisions to some services available to your application (Figure 27–2).

Figure 27–2 The Recent Activity Task Flow



Tracked changes include additions and revisions to pages, documents, discussion forums, lists (WebCenter Spaces only), and events.

By default, the Recent Activity list displays 25 recent activities for a given service. If more than 25 activities have occurred, the Recent Activity list displays the 25 most recent. Your application administrator can change the default value, so your limit may 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. For example, in a custom WebCenter application, changes are tracked on all applicable services across the entire application.

In a WebCenter Spaces group space page, the Recent Activity list summarizes changes occurring in that group space. In a WebCenter Spaces personal space, the Recent Activity task flow must have a group space specified (see Section 27.3, "Setting Recent Activities Service Task Flow Properties"). The Recent Activity list summarizes changes occurring in the specified group space.

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.

27.2 Working with the Recent Activities Service Task Flow

With the Recent Activity task flow, there is very little to do to make the most of its features. It automatically detects recent activities on other WebCenter services and reports on its findings.

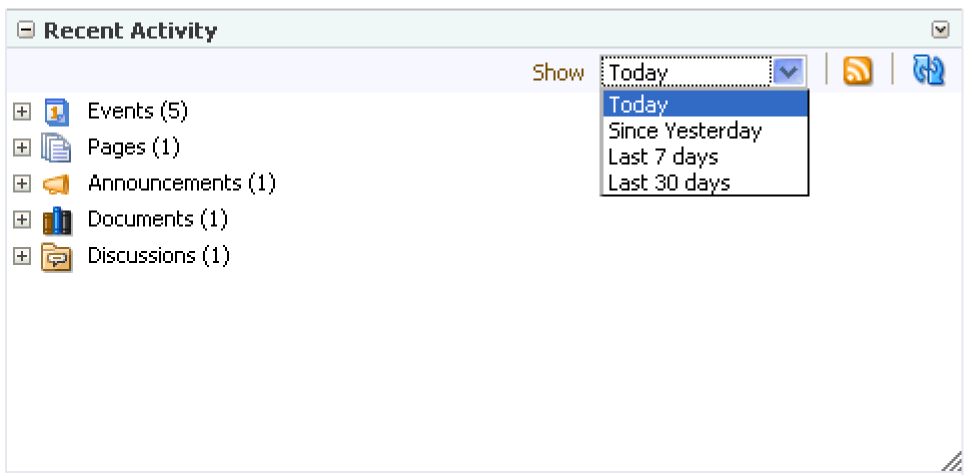
There are, nonetheless, a few recent-activity-centered actions you can take on the task flow. For example, you can personalize your view of recent activities, access a changed item, and refresh your view to update the task flow with the latest changes. This section tells you how. It contains the following subsections:

- Section 27.2.1, "Personalizing the Recent Activity Task Flow"
- Section 27.2.2, "Accessing Recently Acted-On Items"
- Section 27.2.3, "Refreshing the Recent Activity Task Flow"

27.2.1 Personalizing the Recent Activity Task Flow

The Recent Activity task flow provides a way to specify the range of time within which to view changes and additions to other services. These time-range options display on the **Show** menu in the Recent Activity task flow toolbar (Figure 27–3).

Figure 27–3 Time-Range Options on the Recent Activity List



Select an option from the **Show** menu to view recent activities occurring within the selected time range. The time range you select is applicable only to that task flow instance. If you have more than one Recent Activity task flow instance on the page, you can display activities from a different time range in each task flow instance.

> **Tip:** Ensure that your application Preferences reflect your own local time zone. To access your time zone preference in the WebCenter Spaces application, click the **Preferences** link at the top of the application and then select **General**. For more information, see Section 3.2, "Setting Date and Time Preferences."

The default options on the **Show** menu include:

- **Today**—The task flow displays all activities that have taken place between 12:00AM (2400 hours) and now.
- **Since Yesterday**—The task flow displays all activities that have taken place between now and yesterday at 12:00AM (2400 hours).

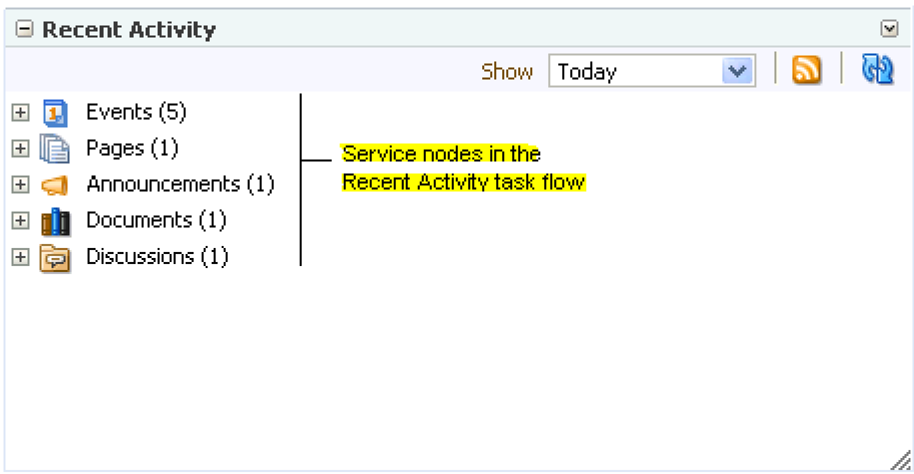
- **Last 7 days**—The task flow displays all activities that have taken place in the last 7 days.
- **Last 30 days**—The task flow displays all activities that have taken place in the last 30 days.

> **Note:** These options are described according to their default meanings. In some instances, an advanced user can provide alternative definitions for them. For more information, see Section 27.3, "Setting Recent Activities Service Task Flow Properties."

27.2.2 Accessing Recently Acted-On Items

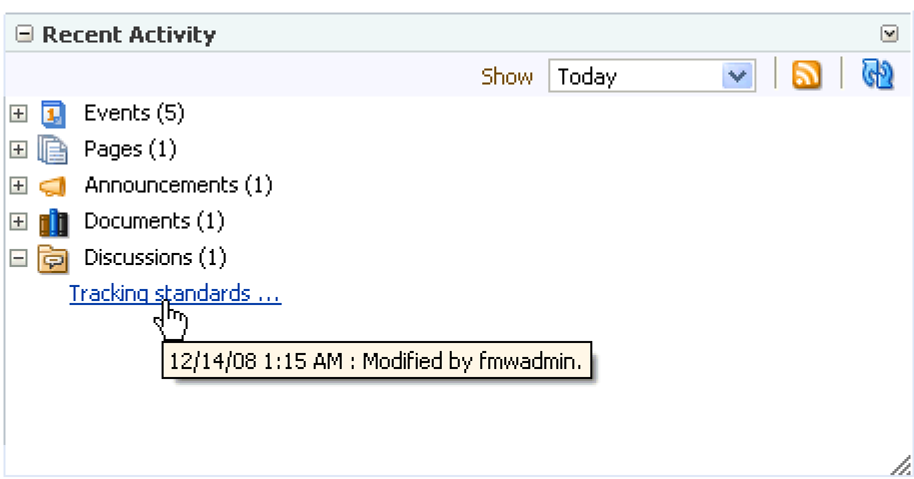
The Recent Activity task flow groups the different services it reports on into nodes that are named for each service (Figure 27–4).

Figure 27–4 Service Nodes in the Recent Activity Task Flow



Expand a node, and access the changed item directly by clicking its link (Figure 27–5).

Figure 27–5 Recent Discussion Link in the Recent Activity Task Flow



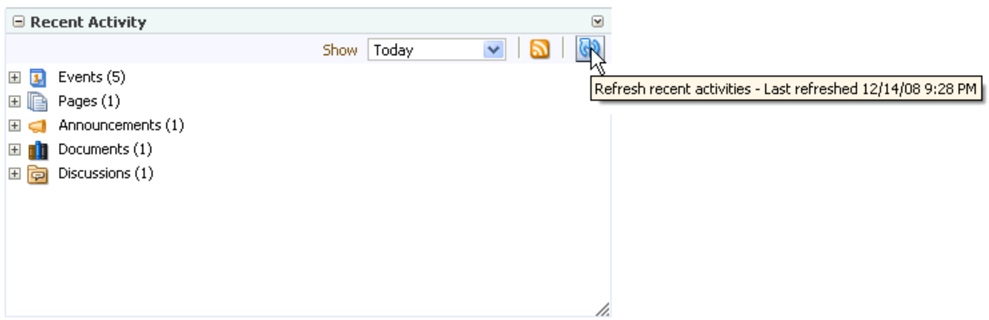
The targets of linked items open on dynamically-generated pages, or in the WebCenter Spaces application, on dynamically-generated, top-level tabs. Link targets display according to their parent service. For example, click a Discussions service link to access a forum or a specific topic under a forum; click a Lists service link to access an updated list of lists or a specific updated list; click an event to display event details; and so on.

Note: For information on closing top-level tabs, see Section 2.5.5, "Closing Group Spaces and Other Top-Level Tabs."

27.2.3 Refreshing the Recent Activity Task Flow

If you prefer not to wait for an automatic refresh of the Recent Activity task flow, you always have the option of refreshing the task flow yourself by clicking its Refresh icon (Figure 27–6).

Figure 27–6 The Refresh Icon on a Recent Activity Task Flow



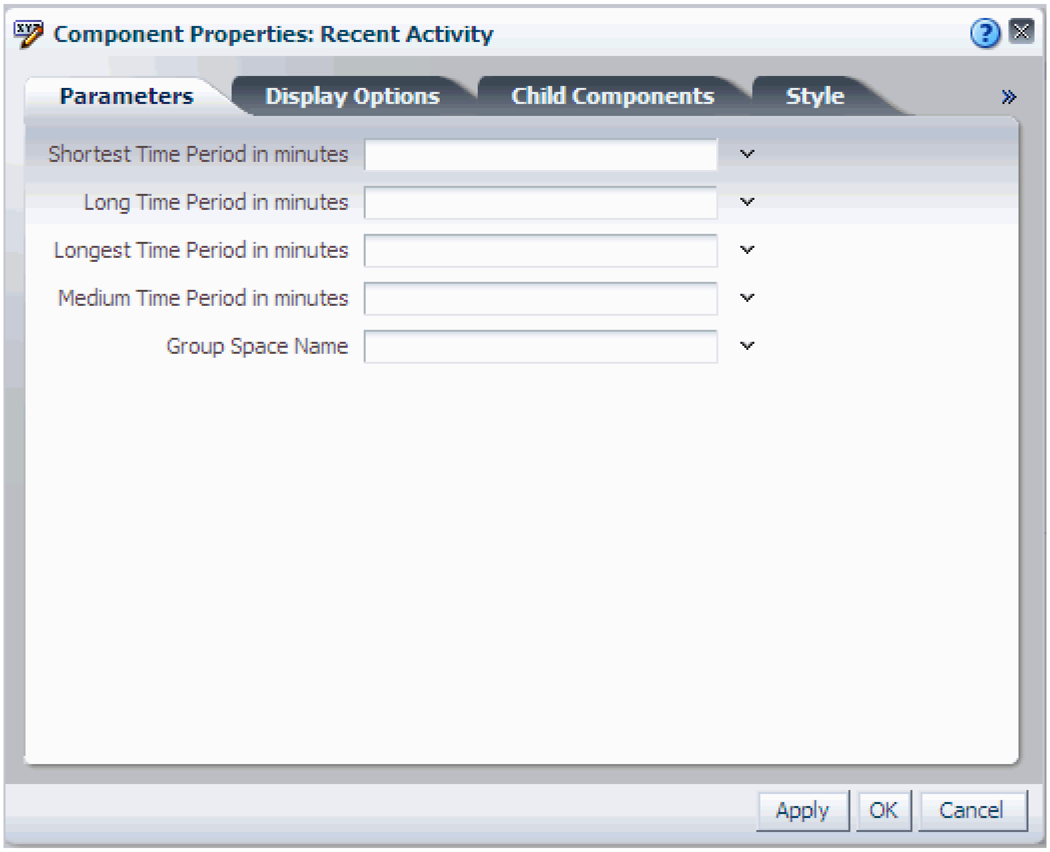
The task flow updates and indicates the number of recently-changed items by increasing the value displayed in parenthesis next to each affected service.

27.3 Setting Recent Activities Service Task Flow Properties

For the steps to add a Recent Activities service task flow to a page, see Section 10.1.4, "Adding Task Flows to a Page."

The Recent Activities service task flows have associated properties, which users with sufficient privileges can access through the Component Properties dialog in Oracle Composer (Figure 27–7). Many properties are common to all task flows, and the method for accessing task flow properties is the same from task flow to task flow. Common task flow properties and how to access them are discussed in Section 10.4, "Setting Properties on Page Content."

Figure 27–7 Recent Activity Task Flow Component Properties



The properties on the **Parameters** tab of the Component Properties dialog control the default task flow content and facilitate the wiring of the task flow to page parameters and page definition variables. These properties are unique to the task flow type. For more information, see Section 10.4.3, "Working with Component Parameters." For information about wiring pages and components, see Chapter 11, "Wiring Pages, Task Flows, Portlets, and UI Components."

Changes to the properties on the **Display Options**, **Style**, and **Content Style** tabs affect the appearance and behavior of the task flow for all users. These properties are common to all task flows. For more information, see Section 10.4.4, "Working with Component Display Options" and Section 10.4.7, "Working with Style and Content Style Properties."

The contents of the **Events** tab depend on the events supported by the task flow. For more information, see Section 10.4.8, "Working with Component Contextual Events."

The **Child Components** tab displays all of the components contained within the current component. It provides controls for rearranging, showing, and hiding child components. Not all components contain children. So you may find this tab devoid of content. For more information, see Section 10.4.6, "Working with Child Components."

All properties on the **Parameters** and **Display Options** tabs provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the **Edit** icon next to a property field to open the editor. For more information about using the editor and for descriptions of common EL expressions, see Section 10.4.5, "Using Expression Language (EL) Expressions with Component Properties."

Table 27–1 describes the properties that are unique to the Recent Activities task flow.

Table 27–1 Recent Activity Task Flow Properties: Parameters Tab

Property	Description
`Group Space Name`	Applicable in WebCenter Spaces only. Leave this field blank if the task flow is on a custom application page. Use this property to specify the group space for which to display recent activities. On a personal space page, use this to narrow the range of displayed activities. Rather than tracking activities application-wide—the default behavior—you can, for example, set a **Constant** value of a particular group space's display name. On a group space page, use this parameter to display some other group space's recent activities or to display recent activities for all group spaces. Valid values include: ■ The display name or GUID of the group space to search ■ `null` (empty), to search according to the contextual default Use for group space pages only. An empty value on a group space page searches the current group space. **Note**: Always specify a value on a personal space page. An empty value does not return any results. If no value is specified, then the following message displays in the Recent Activity task flow: `Recent Activity in the Personal Space requires a groupSpace taskflow parameter value to use for the search.` ■ `defaultScope` (or the `defaultScope` GUID), to search all group spaces

`Medium Time Period in minutes`	Equivalent to `Yesterday` on the Recent Activity **Show** menu. For defining the time range between `Short` and `Long` within which activities are displayed on the Recent Activity list.
	
	Valid values include:
	■ **TODAY**—Activities that have occurred since midnight in the currently selected time zone display on the Recent Activity list.
	■ **YESTERDAY**—Activities that have occurred since midnight yesterday in the currently selected time zone display on the Recent Activity list.
	■ A number of minutes—Activities that have occurred within the specified number of minutes display on the Recent Activity list. For example, a value of `60` renders as **Last Hour** on the **Show** menu. A value of `1440` is rendered as **Last Day**.
	
	Example values:
	`Constant: TODAY (Displays all activity since midnight)`
	`Constant: 2880 (Displays all activity within the last 2880 minutes. This is displayed as Last 2 Days on the Show menu.)`
	`EL Expression: ${myAppBean.timePeriod} (Displays based on the value from the given Bean property "timePeriod")`

Table 27–1 (Cont.) Recent Activity Task Flow Properties: Parameters Tab

Property	Description

`Long Time Period in minutes`	Equivalent to `Last 7 Days` on the Recent Activity **Show** menu. Used for defining the time range between `Medium` and `Longest` within which activities are displayed on the Recent Activity list.
	
	Valid values include:
	
	■ **TODAY**—Activities that have occurred since midnight in the currently selected time zone display on the Recent Activity list.
	
	■ **YESTERDAY**—Activities that have occurred since midnight yesterday in the currently selected time zone display on the Recent Activity list.
	
	■ A number of minutes—Activities that have occurred within the specified number of minutes display on the Recent Activity list. For example, a value of `60` renders as **Last Hour** on the **Show** menu. A value of `1440` is rendered as **Last Day**.
	
	Example values:
	
	`Constant: TODAY (Displays all activity since midnight)`
	`Constant: 2880 (Displays all activity within the last 2880 minutes. This is displayed as Last 2 Days on the Show menu.)`
	`EL Expression: ${myAppBean.timePeriod} (Displays based on the value from the given Bean property "timePeriod")`

Table 27–1 (Cont.) Recent Activity Task Flow Properties: Parameters Tab

Property	Description

`Longest Time Period in minutes`	Equivalent to `Last 30 Days` on the Recent Activity **Show** menu. For defining the longest range of time within which activities are displayed on the Recent Activity list.
	
	Valid values include:
	
	■ **TODAY**—Activities that have occurred since midnight in the currently selected time zone display on the Recent Activity list.
	■ **YESTERDAY**—Activities that have occurred since midnight yesterday in the currently selected time zone display on the Recent Activity list.
	■ A number of minutes—Activities that have occurred within the specified number of minutes display on the Recent Activity list. For example, a value of `60` renders as **Last Hour** on the **Show** menu. A value of `1440` is rendered as **Last Day**.
	
	Example values:
	
	`Constant: TODAY (Displays all activity since midnight)`
	`Constant: 2880 (Displays all activity within the last 2880 minutes. This is displayed as Last 2 Days on the Show menu.)`
	`EL Expression: ${myAppBean.timePeriod} (Displays based on the value from the given Bean property "timePeriod")`

`Shortest Time Period`	Equivalent to `Today` on the Recent Activity **Show** menu. Used for defining the shortest range of time within which activities are displayed on the Recent Activity list. **Today** is measured from midnight in your selected time zone.
	
	Valid values include:
	
	■ **TODAY**—Activities that have occurred since midnight in the currently selected time zone display on the Recent Activity list.
	■ **YESTERDAY**—Activities that have occurred since midnight yesterday in the currently selected time zone display on the Recent Activity list.
	■ A number of minutes—Activities that have occurred within the specified number of minutes display on the Recent Activity list. For example, a value of `60` renders as **Last Hour** on the **Show** menu. A value of `1440` is rendered as **Last Day**.
	
	Example values:
	
	`Constant: TODAY (Displays all activity since midnight)`
	`Constant: 2880 (Displays all activity within the last 2880 minutes. This is displayed as Last 2 Days on the Show menu.)`
	`EL Expression: ${myAppBean.timePeriod} (Displays based on the value from the given Bean property "timePeriod")`

28

Working with the Search Service

This chapter describes how to use the features provided through the Search service.

This chapter includes the following sections:

- Section 28.1, "What You Should Know About the Search Service"
- Section 28.2, "Working with Search Service Task Flows"
- Section 28.3, "Setting Search Service Task Flow Properties"

Audience

This chapter is intended for WebCenter Spaces users interested in using and managing search. Much of this information also applies to custom WebCenter applications, though it is written with WebCenter Spaces users in mind. (For information about custom WebCenter applications, see "Integrating the Search Service" in *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter*.)

Your application administrator has the authority to expose or hide task flows from a particular service. Tasks discussed in this chapter are not available to you if the relevant service is hidden.

28.1 What You Should Know About the Search Service

The Search service enables the discovery of information and people through an intuitive user interface, returning only the results you are authorized to view. With all relevant information easily navigable, you do not have to switch between applications performing multiple searches.

Use the Search service to run, refine, and save custom searches. By default, WebCenter Search looks for your search terms in every searchable service available to the application (a *global search*). You can configure the services to which a search has access with your personal preferences (see Section 3.9, "Setting Preferences for WebCenter Spaces Search Results").

Information in WebCenter services is searched by name and content. In WebCenter Spaces, you can also search an individual group space.

In addition to WebCenter Search, the Documents service provides its own search engine for file and folder searches. This saves time and increases the relevancy of results by narrowing the scope of a search to files. The Documents service searches within a specific group or personal space's document library. For more information, see Section 18.4.8, "Running Document Searches in the Document Manager Task Flow."

In all cases, searches return only the results you are authorized to view. For example, if you are not a member of the *Finance* group space, then any search results from that group space do not display.

Search results return content and tag matches. Tag matches display on the Search Results page and in the Search Results window. For more information about tagging, see Chapter 29, "Working with the Tags Service."

28.1.1 Setting Search Preferences

The WebCenter Search service uses search adapters to find content inside WebCenter applications. However, your WebCenter Spaces administrator can override the default search adapters and use Oracle Secure Enterprise Search (SES) to get unified ranking results for the following resources:

- Documents
- Group Spaces
- Group Space Announcements
- Group Space Discussions
- Lists
- Pages
- People
- Wikis and blogs

The results are listed together, instead of being clustered into separate sections for Documents, Discussions, and so on. The most relevant items appear first. For example, when you run a search for a user name, most likely, you are looking for that persons's contact information (that is, the exact user name in the People Connections service), not necessarily documents that the user wrote. The unified ranking results in Oracle SES allow you to see the most relevant results, across all different types of searches, without configuring Search Preferences.

Additionally, with Oracle SES as the WebCenter search engine, you can use the wildcard character [*] in the middle or end of a term for wildcard matching. For example, if 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.

If your administrator did not configure Oracle SES as the search engine, then you can set your personal search preferences to specify which services to search and the order of services in your search results. For example, you may find that search results from the Documents service prove more useful that search results from other services. By default, all services are selected. You can disable any service from which you do not want to see search results. For more information about setting search preferences, see Section 28.1.1, "Setting Search Preferences."

28.2 Working with Search Service Task Flows

WebCenter provides search services for the application and beyond.

This section includes the following subsections:

- Section 28.2.1, "Adding a Search Service Task Flow to a Page"
- Section 28.2.2, "Searching in a WebCenter Application"

- Section 28.2.3, "Refining the Display of Search Results"
- Section 28.2.4, "Saving Searches"

28.2.1 Adding a Search Service Task Flow to a Page

For the steps to add a Search service task flow to a page, see Section 10.1.4, "Adding Task Flows to a Page."

Each group space has a default Search page where users can perform group space-wide searches. If, however, members of the group space need to perform a search from within a different page in the group space, then add the Search task flow to that page. Bear in mind though, that when search results are displayed in the Search task flow, they may be difficult to read if the task flow is on a page with other content.

In WebCenter Spaces, you can add a saved search to a particular page. The results of the search are displayed directly on the page. You can add global saved searches to personal space pages and group space saved searches (both your own and shared ones) to group space pages.

In WebCenter Spaces, you also can provide a quick and easy way of seeing all saved searches by adding the All Saved Searches task flow. In a group space, the All Saved Searches task flow lists your saved searches for the group space and all shared saved searches for the group space. It does not list your global saved searches or saved searches made against other group spaces. In a personal space, the All Saved Searches task flow lists all your global saved searches.

28.2.2 Searching in a WebCenter Application

This section describes how to run a global (that is, application-wide) search, and how to run a search within a specific group space.

This section includes the following subsections:

- Section 28.2.2.1, "Performing a Global Search"
- Section 28.2.2.2, "Performing a Group Space Search"

28.2.2.1 Performing a Global Search

Global search provides an application-wide search. All services offer components to be searched. Provided you have permission to access those components, global search covers all of them.

In WebCenter Spaces, by default, you can perform a global search from the search field at the top-right of the application.

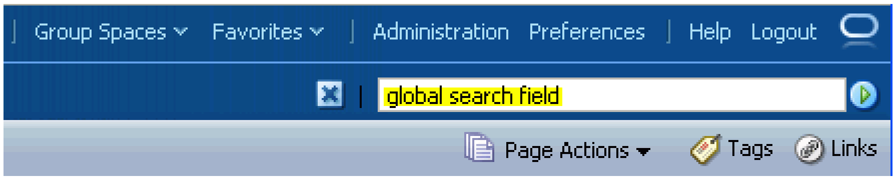
> **Note:** If a group space is configured to display in full screen mode, then the search field at the top-right becomes a group space search field and the search is specific to the current group space.

To perform a global search:

1. Log in and locate the global search field and enter a search term.

   For example, the search field at the top right of the WebCenter Spaces application is a global search field (Figure 28–1).

Figure 28–1 Global Search Field in WebCenter Spaces

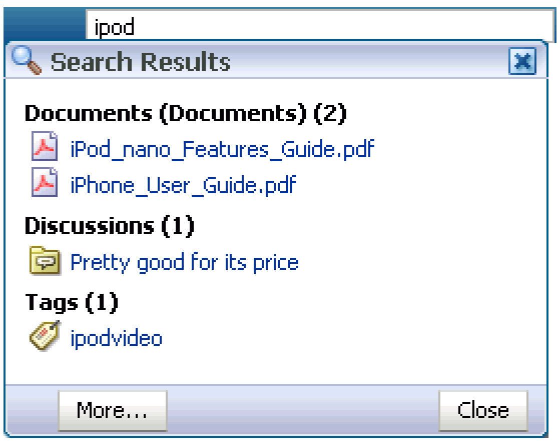


2. Press **Enter** or click the **Search** icon next to the global search field (Figure 28–2).

Figure 28–2 Search Icon

Results display in the **Search Results** popup window (Figure 28–3).

Figure 28–3 Global Search Results Popup Window



Note: Figure 28–3 shows results using the default Oracle search adapters. Notice that search results are segregated into groups. The first group shows the results from the Documents service (2). The second group shows the results from the Discussions service (1). The third group shows the results from the Tags service (1).

---

3. Click a link to open a result.

   Results open differently according to the service that provides them. For example, results from the Documents service open in a new browser tab or window. Results from services that provide resource viewers, such as Discussions, Lists, or Announcements, open in their resource viewer.

4. Optionally, in the Search Results window click the **More** button. In WebCenter Spaces, this displays search results on a separate Search page.

   From here, you can also further refine the search by contributor or last modified date using the Refine Search section. For more information, see Section 28.2.3, "Refining the Display of Search Results." You can also save the search so that you can access the results later. For more information, see Section 28.2.4, "Saving Searches."

You can configure how search results are displayed. Specifically, you can control which services are included in the search, the order in which those services are listed in the results, and what information is included, such as the type, size, or owner of the object returned. Set this in the Search Preferences panel of the Preferences dialog (for information see Section 3.9, "Setting Preferences for WebCenter Spaces Search Results").

28.2.2.2 Performing a Group Space Search

In WebCenter Spaces, each group space has its own Search page. Use this page to restrict your search to that specific group space.

To perform a group space search:

1. Log in and go to the group space where you want to run a search.
2. Click the **Search** tab to bring the **Search** page forward.

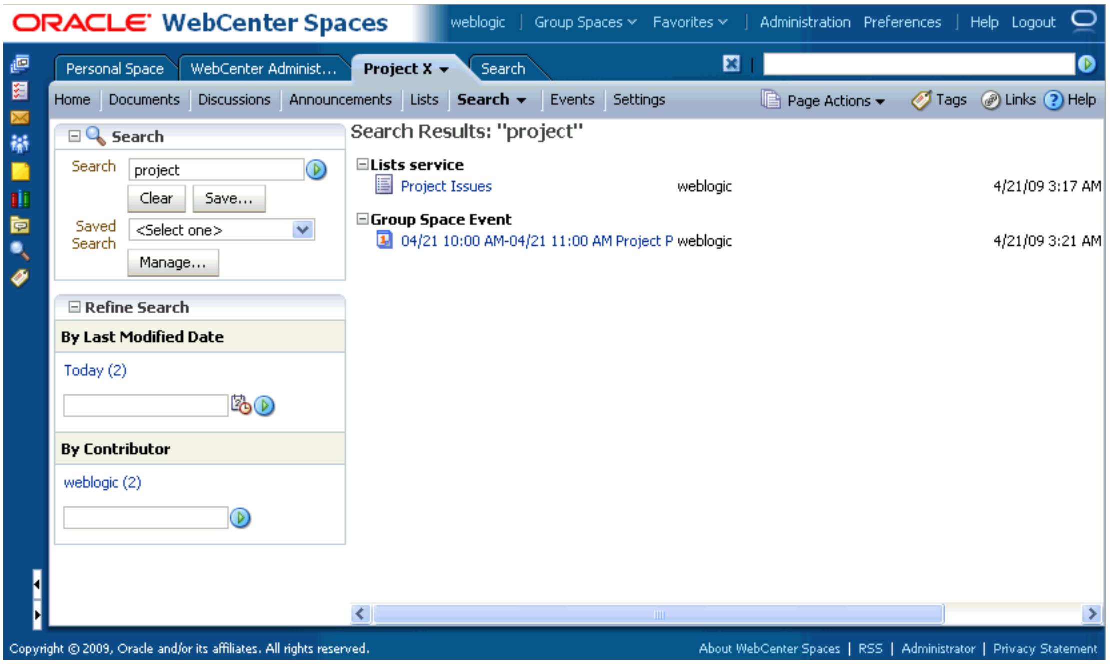
   If the **Search** tab is not available, then open the Manage Pages dialog and select the Search page for display. When the tab opens, click it to bring the page forward. For more information, see Section 2.5, "Hiding, Showing, Opening, and Closing Pages."
3. In the Search task flow, enter a search term in the **Search** field, and click the **Search** button, or press Enter.

Figure 28–4 The Search Task Flow

Note: If the group space is configured to display in full screen mode, then the search field at the top-right becomes a group space search field and you can perform a group space search by entering your search term in this field.

Search results display within the group space's Search page (Figure 28–5).

Figure 28–5 Search Page Showing Search Results



You can further refine the search by contributor or last modified date using the Refine Search section that also appears on the Search page. For more information, see Section 28.2.3, "Refining the Display of Search Results."

Notice that the **Save** button in the Search task flow is no longer greyed out, and you can save this search so that you can access the results later. For more information, see Section 28.2.4, "Saving Searches."

You can configure how the search results are displayed. Specifically, you can control which services are included in the search, the order in which those services are listed in the results, and what information is included, such as the type, size, or owner of the object returned. For information about setting display options for group space search results, see Section 3.9, "Setting Preferences for WebCenter Spaces Search Results."

28.2.3 Refining the Display of Search Results

The Search service provides a means of narrowing down your searches using *refiners*, which you can add to the current search to produce a smaller set of results. You can refine your search results by specifying a time range within which the result was last modified and by limiting results to those associated with a particular user.

Note: Results from the Tags service, People Connections service, and Favorites, which do not supply refiners to the Search service, do not appear in refined searches.

To refine the display of search results:

1. Perform a global search as described in Section 28.2.2.1, "Performing a Global Search," and then click the **More** button in the results popup window.

   Or perform a group space search as described in Section 28.2.2.2, "Performing a Group Space Search."

The search results display on the Search page or in the Search window.

2. In the Refine Search section, to refine the display of search results by date, select a time-range limitation from the Last Modified Date box (Figure 28–6).

Figure 28–6 The Last Modified Date Box on the Search Results Page

For example, click **Since Yesterday** to view all results that originated since yesterday. Click **2006** to view all results that originated in 2006.

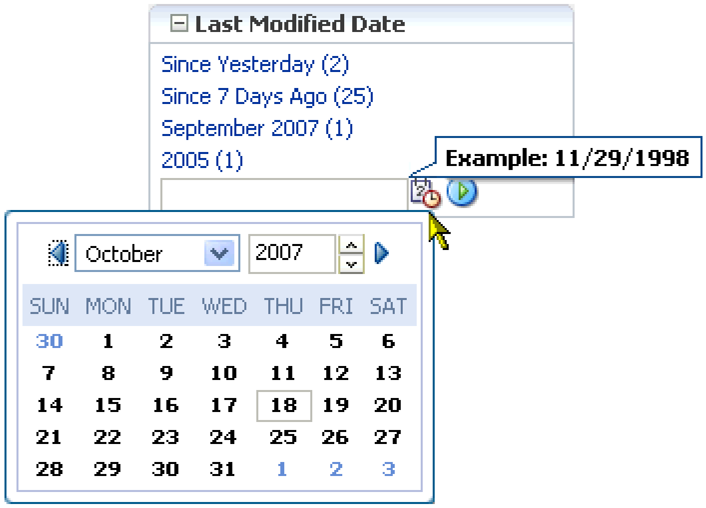
The number next to each time range indicates the search's best guess at how many search results fall within the specified range.

Some date selections, such as years or months, provide additional refinement options when you select 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 Date box. For example, see Figure 28–7.

Figure 28–7 Additional Refinements on a Selected Year

Alternatively, enter a date in the field provided, or click the **Select Date** icon and select a date from a date picker (Figure 28–8).

Figure 28–8 Date Picker for Select Date



3. You can also refine the display of search results by contributor (that is, by the user name of the person who created, uploaded, or originated the result) by selecting a contributor from the Contributor box (Figure 28–9).

Figure 28–9 The Contributor Box on the Search Results Page

For example, click **sysadmin** to view all results contributed by the user `sysadmin`.

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

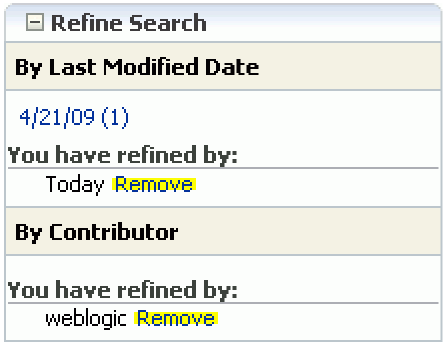
Alternatively, enter a user name in the field provided and click the **Search** icon (Figure 28–10).

Figure 28–10 User Name Field and Search Button in Contributor Box

Results created by the selected contributor and provided within the selected time-range display.

When a refinement is selected, it appears in the relevant box with a **Remove** link next to it, enabling you to remove the refinements you have applied to search results (Figure 28–11).

Figure 28–11 Remove Links on the Search Results Page



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

28.2.4 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 add the saved search to other pages to make them easily available to run.

> **Note:** You can save searches only if you are logged in to the application.

Saved searches retain their association with the context where you created them. For example, when you save a search from a particular group space, the next time you run it, the results appear on a dynamically generated Search Results subpage of that group space. When you run a global saved search in WebCenter Spaces, the results appear on a dynamically generated top-level Search Results page.

This section includes the following subsections:

- Section 28.2.4.1, "Saving a Search"
- Section 28.2.4.2, "Running a Saved Search"
- Section 28.2.4.3, "Sharing a Saved Search in WebCenter Spaces"
- Section 28.2.4.4, "Customizing a Saved Search"
- Section 28.2.4.5, "Deleting a Saved Search"

28.2.4.1 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:

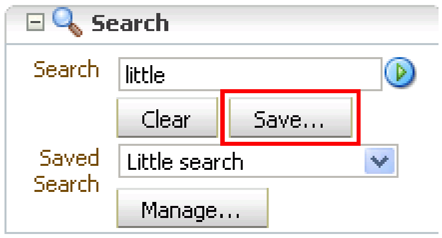
1. Perform a global search as described in Section 28.2.2.1, "Performing a Global Search," and then click the **More** button in the results popup window.

Or perform a group space search as described in Section 28.2.2.2, "Performing a Group Space Search."

The search results display on the Search page or in the Search window.

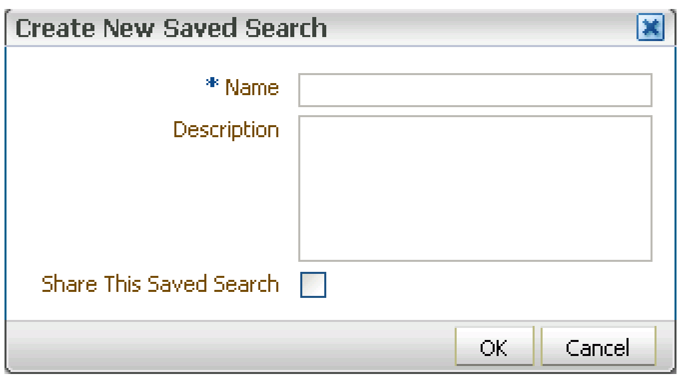
2. Click the **Save** button below the search field (Figure 28–12).

Figure 28–12 The Save Button



The Create New Saved Search dialog opens (Figure 28–13).

Figure 28–13 The Create New Saved Search Dialog (Group Space Search)



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.

   The description is rendered as a tooltip when you move your cursor over the saved search on the **Saved Search** dropdown list.

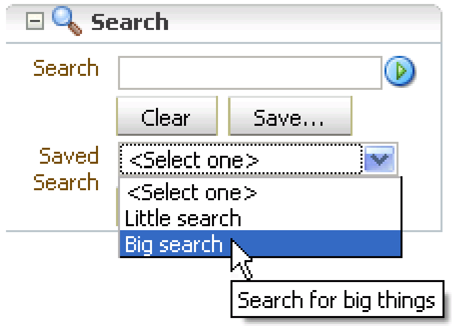
5. For group space searches in WebCenter Spaces, select the **Share this Saved Search** checkbox to enable other members of the group space to see this search on the dropdown list of saved searches.

   If you want this search to be private, then clear the **Share this Saved Search** checkbox.

6. Click **OK** to save the search.

   The name appears on the dropdown list of saved searches (Figure 28–14).

Figure 28–14 Saved Search Dropdown List



28.2.4.2 Running a Saved Search

You can run a saved search from several locations. The saved searches to which you have access depends on the location.

- Go to any page containing the Search task flow (Figure 28–15).

  If the Search task flow is on a group space page (including the group space's Search page), then it lists your saved searches for the group space and shared saved searches for the group space. If the Search task flow is on the global Search page, then it lists your global saved searches.

  > **Note:** The number of searches listed in the Saved Search list depends on the configuration of the Search service. The default is 25. If you cannot find a particular saved search in this list, try the Manage Saved Searches dialog instead.

Figure 28–15 Saved Searches in the Search Task Flow

- Click the **Manage** button in the Search task flow to access the Manage Saved Searches dialog (Figure 28–16).

  The Manage Saved Searches dialog lists the same saved searches as listed in the Search task flow from which it was launched.

Figure 28–16 The Manage Saved Searches Dialog

- Go to any page containing the All Saved Searches task flow (Figure 28–17).

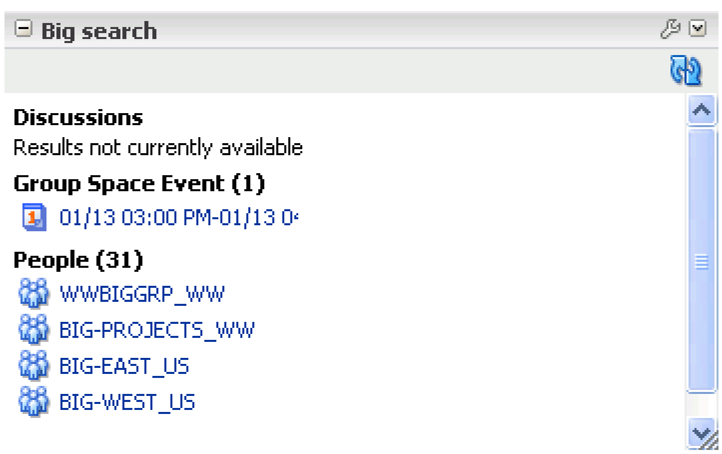
  In a group space, the All Saved Searches task flow lists all your saved searches for the group space and all shared saved searches for the group space (made both by yourself and other users). It does not list your global saved searches or saved searches made against other group spaces. In a personal space, the All Saved Searches task flow lists all your global saved searches.

Figure 28–17 The All Saved Searches Task Flow

- Go to any page where the saved search was placed (Figure 28–18).

  The Saved Search task flow shows the results of the particular search.

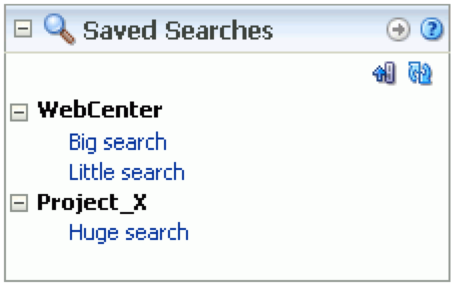
Figure 28–18 A Saved Search Listed on a Page



- Locate the Saved Searches panel in the Sidebar (Figure 28–19).

  The Sidebar lists saved searches personal to you. That is, global and group space searches that you, personally, have saved. It does not list searches saved by other users and shared with you.

Figure 28–19 Saved Searches in the WebCenter Spaces Sidebar



To run a saved search:

1. Log in and find the saved search:
   - Locate the page containing the Search task flow, for example, the group space's Search page.
   - Locate the page containing the All Saved Searches task flow.
   - Locate the page containing the saved search. In this case, the search results are immediately visible.
   - Expand the Saved Search panel in the WebCenter Spaces Sidebar.
2. If you are using the Search task flow, then select the search from the **Saved Search** drop down list.

   If you are using the Manage Saved Searches dialog, the All Saved Searches task flow, or the Saved Search panel in the Sidebar, 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.

28.2.4.3 Sharing a Saved Search in WebCenter Spaces

In WebCenter Spaces, you can share a saved group space search if you think the results of a search might be useful for other group space members.

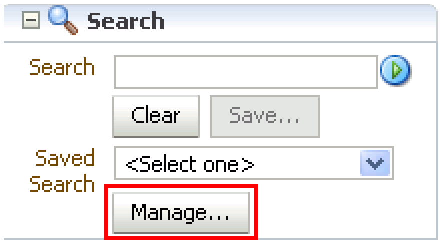
To share a saved search:

1. Log in and go to the group space where the search was performed and saved.
2. Open the **Search** page.

   If the **Search** page does not display, open the Manage Pages dialog and select the **Search** page for display. For more information, see Section 2.5.3, "Showing Hidden Pages."

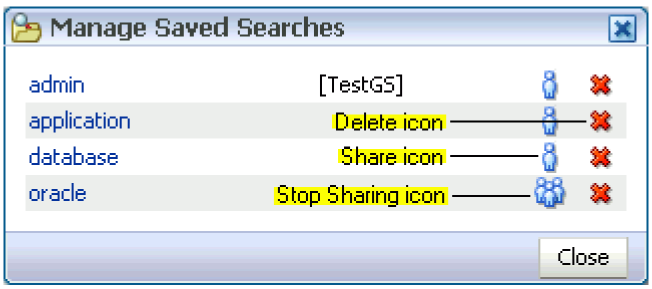
3. In the Search box, click the **Manage** button (Figure 28–24).

Figure 28–20 Manage Button



The **Manage Saved Searches** window opens (Figure 28–25).

Figure 28–21 The Manage Saved Searches Window



4. Click the **Share** icon next to the saved search you want to share.

   The icon changes to indicate that the saved search is now shared. The saved search is now available for other members of the group space to run. The search is listed in the Search task flow Saved Searches list for all group space members and in the All Saved Searches task flow, if one exists.

5. When you no longer want to share a saved search, click the **Stop Sharing** icon.

6. Click **Close**.

28.2.4.4 Customizing a Saved Search

After you have added a saved search to a page, you can customize it to change the search terms, add refiners, or select the services to search. The changes you make are visible to everyone. In the task flow header, click the **Edit** icon (Figure 28–22).

Figure 28–22 Edit Icon

The changes you make here affect only this particular instance of the saved search. If you add the same saved search to the page or to a different page, then the original search settings still apply.

You can also personalize the saved search when you are viewing the page (rather than editing it by clicking the **Personalize** icon (Figure 28–23) and making your changes. The changes you make are visible only to you.

Figure 28–23 Personalize Icon

28.2.4.5 Deleting a Saved Search

When a saved search has outlived its usefulness, WebCenter provides a way to remove it.

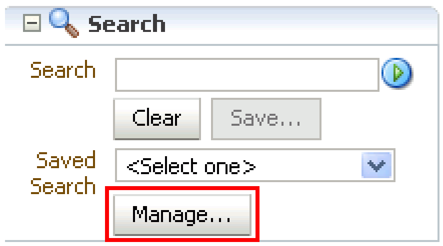
To delete a saved search:

1. Log in and, to delete a global saved search, run the search and then click the **More** button in the Search Results popup window. For information about how to run a saved search, see Section 28.2.4.2, "Running a Saved Search."

   To delete a group space saved search, go to Search page of the group space where the search was performed and saved.

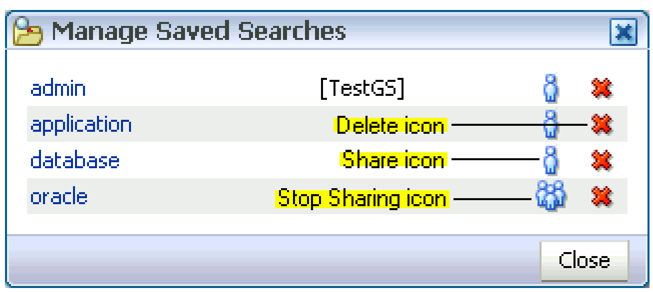
2. In the Search task flow, click the **Manage** button (Figure 28–24).

   Figure 28–24 Manage Button

   The **Manage Saved Searches** window opens (Figure 28–25).

   Figure 28–25 The Manage Saved Searches Window

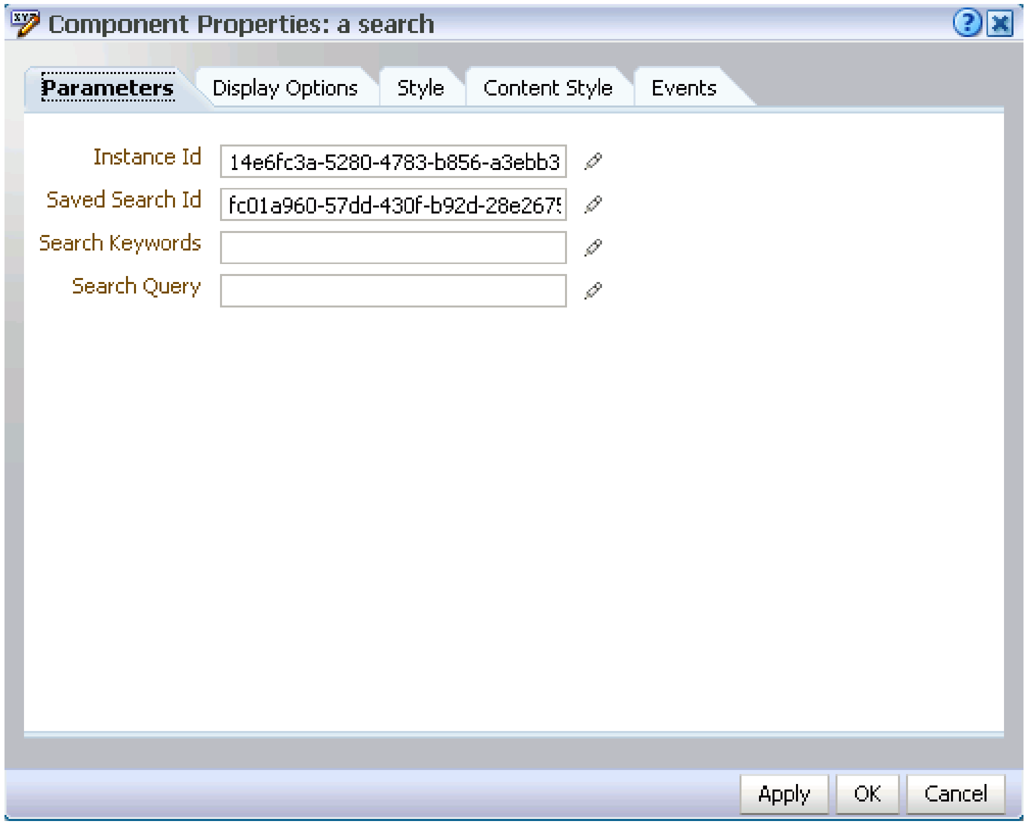
   

3. Click the **Delete** icon next to the saved search you want to delete.
4. Click the **Close** button.

28.3 Setting Search Service Task Flow Properties

The Search service task flows have associated properties, which users with sufficient privileges can access from the Component Properties dialog in Oracle Composer (Figure 28–26). Many properties are common to all task flows, and the method for accessing task flow properties is the same from task flow to task flow. Common task flow properties and how to access them are discussed in Section 10.4, "Setting Properties on Page Content."

Figure 28–26 Saved Search Task Flow Component Properties



The properties on the **Parameters** tab of the Component Properties dialog control the default task flow content and facilitate the wiring of the task flow to page parameters and page definition variables. These properties are unique to the task flow type. For more information, see Section 10.4.3, "Working with Component Parameters." For information about wiring pages and components, see Chapter 11, "Wiring Pages, Task Flows, Portlets, and UI Components."

Changes to the properties on the **Display Options**, **Style**, and **Content Style** tabs affect the appearance and behavior of the task flow for all users. These properties are common to all task flows. For more information, see Section 10.4.4, "Working with Component Display Options" and Section 10.4.7, "Working with Style and Content Style Properties."

The content of the **Events** tab depends on the events supported by the task flow. For more information, see Section 10.4.8, "Working with Component Contextual Events."

The **Child Components** tab displays all of the components contained within the current component. It provides controls for rearranging, showing, and hiding child components. Not all components contain children. So you may find this tab devoid of content. For more information, see Section 10.4.6, "Working with Child Components."

All properties on the **Parameters** and **Display Options** tabs provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the **Edit** icon next to a property field to open the editor. For more information about using the editor and for descriptions of common EL expressions, see Section 10.4.5, "Using Expression Language (EL) Expressions with Component Properties."

Table 28–1 describes the properties that are unique to the Search task flows.

Note: The All Saved Searches task flow does not have any unique properties, and therefore no **Parameters** tab in the Component Properties dialog.

Table 28–1 Search Service Task Flow Properties: Parameters Tab

Property	Description	Task Flow
`Instance Id`	A system-generated ID for a particular instance of the saved search on the page. This value is intended for internal use only. Do not change this value.	Saved Search
`Resource ID`	Either search keywords or the saved search GUID. This parameter is intended for internal use only. Do not change this value unless you want coded search main views. If you do change this value, then you must also specify `Resource Type`.	Search
`Resource Type`	A marker specifying whether the `Resource ID` parameter means search keywords or saved search GUID. This value is set automatically and is for internal use only. Do not change it unless you want coded search main views.	Search
`Saved Search Id`	A system-generated ID for the saved search. This value is intended for internal use only. Do not change this value.	Saved Search
`Search Keywords`	The keywords in the saved search are fixed. This parameter is intended for internal use only.	Saved Search
`Search Query`	An object of type `oracle.webcenter.search.Query`. This parameter is intended for internal use only.	Saved Search
`Services to be Excluded`	A list of IDs of services or executors to omit when displaying search results. This value is intended for internal use only. Do not change this value.	Search

29

Working with the Tags Service

This chapter describes how to use the features provided through the Tags service. Tagging enables users to apply their own meaningful terms to WebCenter application items, making those items more easily discoverable in search results, the Sidebar (and Tags task flow), and the Tag Center.

This chapter includes the following sections:

- Section 29.1, "What You Should Know About the Tags Service"
- Section 29.2, "Working with Tags Service Features and Task Flows"
- Section 29.3, "Setting Tags Service Task Flow Properties"

Audience

This chapter is intended for WebCenter Spaces users interested in viewing, creating, and managing tags. Much of this information also applies to custom WebCenter applications, though it is written with WebCenter Spaces users in mind. (For information about custom WebCenter applications, see "Integrating the Tags Service" in *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter*.)

Your application administrator has the authority to expose or hide task flows from a particular service. Tasks discussed in this chapter are not available to you if the relevant service is hidden.

29.1 What You Should Know About the Tags Service

The Tags service provides a means of bookmarking application objects, making them easy to locate the next time you go looking for them. You can tag pages and documents in WebCenter applications. This section provides an overview of the Tags service: what tags are and how to use tags. It contains the following subsections:

- Section 29.1.1, "Understanding Tags"
- Section 29.1.2, "Understanding the Tags Task Flow"
- Section 29.1.3, "Understanding the Similarly Tagged Items Task Flow"
- Section 29.1.4, "Understanding the Tag Center"

29.1.1 Understanding Tags

A *tag* is a word you associate with WebCenter application pages or documents, applying your own classification to improve search results. For example, you could apply the tag `jcr` to a page that provides useful insight into Java Content

Repositories. When you search for information about JCRs, the tagged page appears in the results.

Tags are available for viewing in the Sidebar and Tags task flow, in 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.

Your tags help provide a higher level of relevance from search results for yourself and others by augmenting results with relevant items that you or others have tagged. Additionally, classifying an item with a tag enables you to gather disparate items into a cohesive body of knowledge and share it with others.

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.

Anywhere you see the **Tags** icon (Figure 29–1), you can apply a tag.

Figure 29–1 The Tag Icon

When you place your cursor over the **Tags** icon, you see a list of any tags you have applied to the item and the tags that have been applied most frequently to the item by you and other users. To see the items associated with a displayed tag, click the tag.

When looking at tags in search results, 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*.

> **Note:** According to Wikipedia, folksonomies make a body of information increasingly easy to search, discover, and navigate over time (`http://en.wikipedia.org/wiki/Folksonomy`).

The scope of tags is both personal and application-wide. The tag data you view in the Sidebar or the Tags task flow includes only the tags you apply; however, when you tag data through the Tag Center or through a Tags service task flow you see application-wide tag data.

Application-wide (global) searches look for tagged items wherever they might be. You can run global searches from the search field near the top-right of the WebCenter Spaces application or from a personal space **Search** page.

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.

29.1.2 Understanding the Tags Task Flow

The Tags task flow provides a view of the tags you have added to your application and the items you have tagged. It is available in the Oracle Composer Catalog. Additionally, it is exposed in the WebCenter Spaces Sidebar. In the Sidebar, click the **Personal tags** icon (Figure 29–2) or expand the Tags panel, depending on the current Sidebar state, to open the Tags task flow (Figure 29–3).

Figure 29–2 Personal Tags Icon in Sidebar

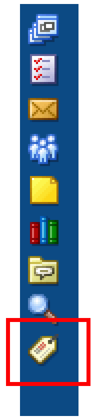
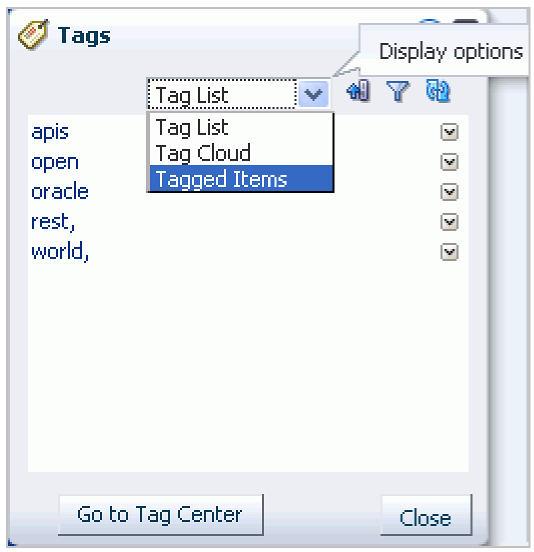


Figure 29–3 Tags Task Flow



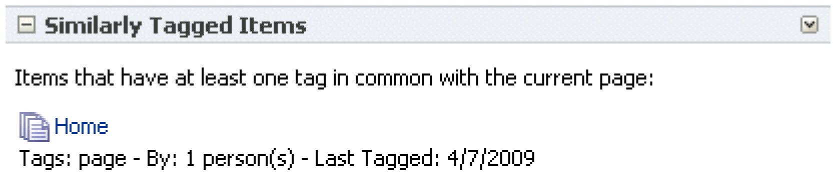
You can use the Tags task flow to navigate to a tag's associated resources or to open the Tag Center and further refine your resource selection (see Section 29.2.6, "Working with Tags and Tagged Items in the Tag Center"). You can also use it to display a tag cloud or the items you have tagged in your WebCenter application.

To learn how to work with tags in the Tags task flow see Section 29.2.4, "Working with Tags and Tagged Items in the Tags Task Flow."

29.1.3 Understanding the Similarly Tagged Items Task Flow

The Similarly Tagged Items task flow (Figure 29–4) provides a list of links to other pages that have at least one tag in common with the currently-displayed page.

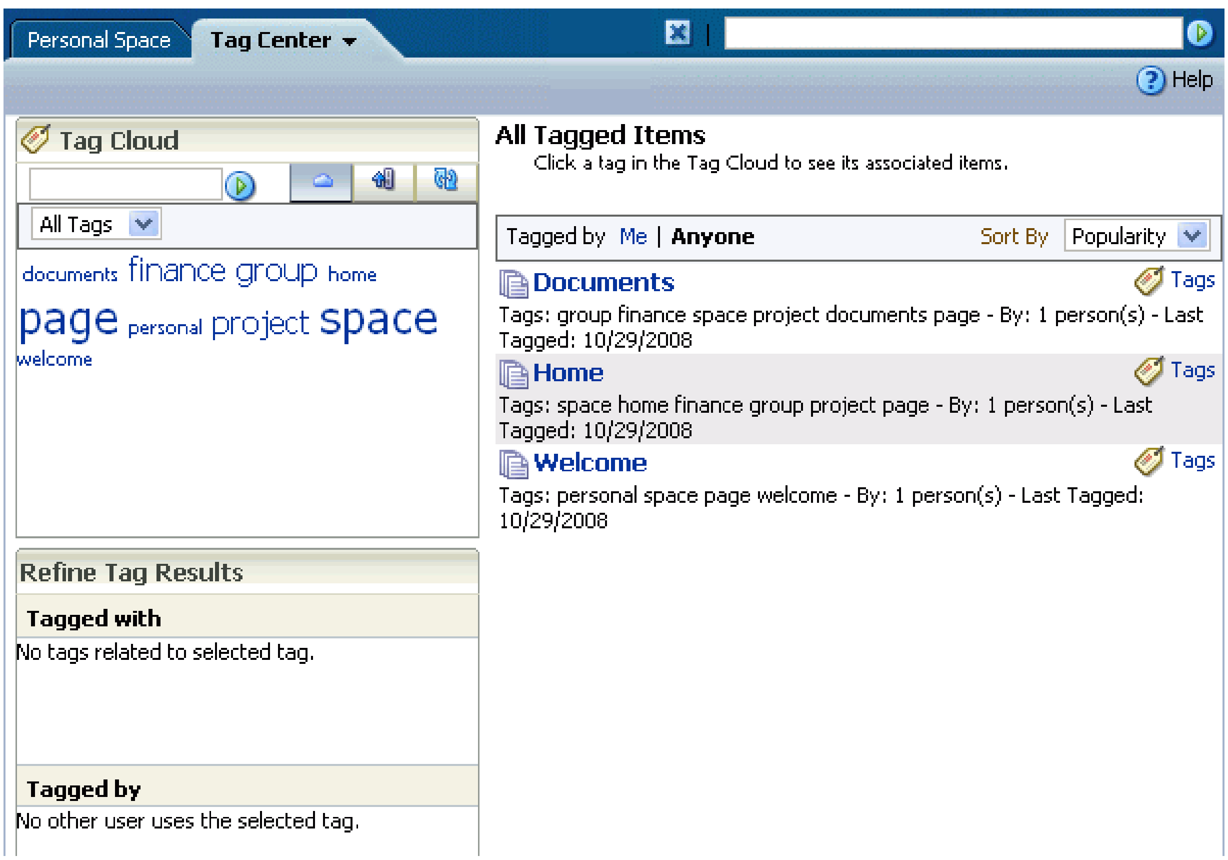
Figure 29–4 The Similarly Tagged Items Task Flow



29.1.4 Understanding the Tag Center

The Tag Center is a dynamically-generated page that displays all the tags you and other users have applied to WebCenter application pages and documents (Figure 29–5).

Figure 29–5 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. 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 items.

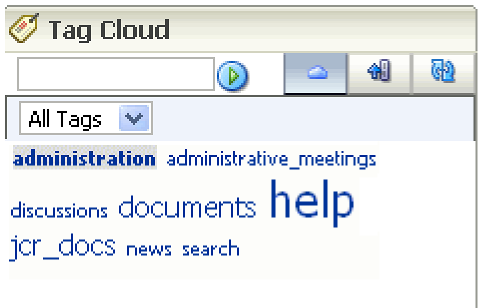
The Tag Center has three sections:

- At the top left is the Tag Cloud section, which you can use to view a cloud or list of the tags currently applied to WebCenter application items.

- Under the Tag Cloud is the Refine Tag Results section with two types of list: a list of all other tags used on items that also use the currently-selected tag and a list of other users who have applied the selected tag.
- On the right is the All Tagged Items section, which provides a list of all items to which you have access that use the currently-selected tag and options to edit, sort, and filter the items.

The Tag Cloud is a visual depiction of currently-applied tags (Figure 29–6).

Figure 29–6 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 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 29.2.6, "Working with Tags and Tagged Items in the Tag Center."

29.2 Working with Tags Service Features and Task Flows

This section provides information about tagging and describes how to make best use of tags. It includes the following subsections:

- Section 29.2.1, "Adding a Tags Service Task Flow to a Page"
- Section 29.2.2, "Tagging WebCenter Application Pages"
- Section 29.2.3, "Tagging WebCenter Application Documents"
- Section 29.2.4, "Working with Tags and Tagged Items in the Tags Task Flow"
- Section 29.2.5, "Viewing Tags and Tagged Items in Search Results"
- Section 29.2.6, "Working with Tags and Tagged Items in the Tag Center"

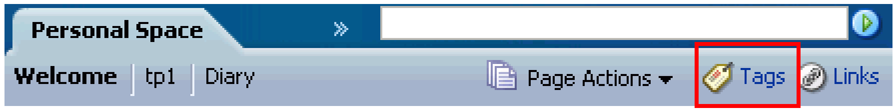
29.2.1 Adding a Tags Service Task Flow to a Page

For the steps to add a Tags service task flow to a page, see Section 10.1.4, "Adding Task Flows to a Page."

29.2.2 Tagging WebCenter Application Pages

This section steps you through the process of applying tags to WebCenter application pages. You can apply a tag to any application page on which you see the **Tags** icon and link (Figure 29–7).

Figure 29–7 A Page's Tags Icon and Link



To tag a WebCenter application page:

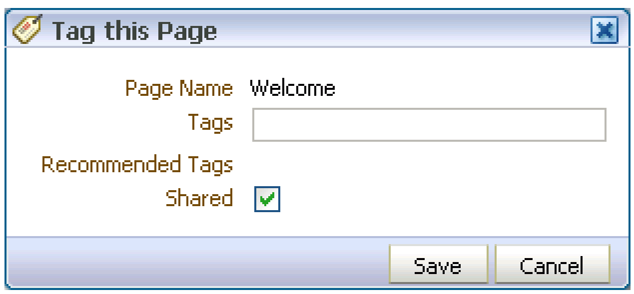
1. Log in to WebCenter, and go to the page you want to tag.

   For assistance with locating a page or a personal or group space, see Section 2.5, "Hiding, Showing, Opening, and Closing Pages."

2. Click the page's **Tags** icon or link. On pages, the **Tags** icon is at the top right of the page chrome (Figure 29–7).

   The Tag this Page dialog opens (Figure 29–8).

Figure 29–8 The Tag this Page Dialog



3. Enter tag values:

   - **Page Name**—The page's display name, a read-only value.
   - **Tags**—Enter one or more tags. Separate one tag from another with a space.
   - **Recommended Tags**—Recommended tags are automatically generated using a ranking algorithm. They indicate the system's best estimation of tags that suit the page you are currently tagging. Click a recommended tag to add it to the **Tags** field.
   - **Shared**—Imagine that you have tagged a page with the term *essential* and selected the **Shared** checkbox. When other users search using the term *essential*, the page you tagged appears in their search results. If you clear the **Shared** checkbox, other users' search on the term *essential* does not include this page in their results (unless others, too, have tagged it *essential* or another user tagged it *essential* and shared the tag).

     Regardless of whether you select or clear **Shared**, when you search on the term *essential*, the page you tagged with that term appears in your search results.

4. Click **Save** to apply the tag and close the dialog.

Note: For information about tags and searches, see Section 29.2.5, "Viewing Tags and Tagged Items in Search Results."

29.2.3 Tagging WebCenter Application Documents

The section steps you through the process of applying tags to documents. You can apply tags to any documents you can view.

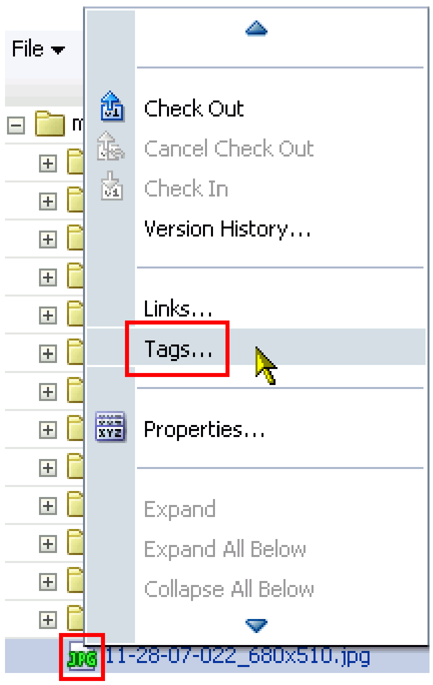
To apply tags to WebCenter application documents:

1. Log in to WebCenter, and go to a Document Library main view, either the task flow or the **Documents** page, and locate the document you want to tag.

   For assistance with locating a **Documents** page Section 2.5, "Hiding, Showing, Opening, and Closing Pages."

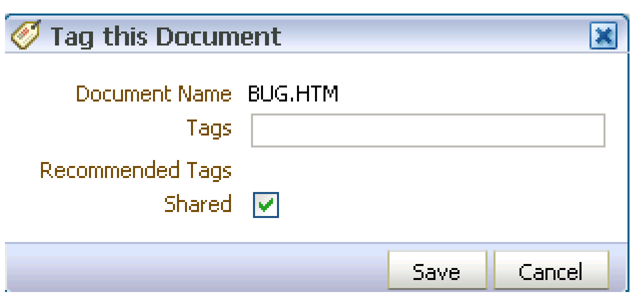
2. Right click the document's icon, and select **Tags** from the resulting context menu (Figure 29–9).

Figure 29–9 The Tags Command on a Document Context Menu



The Tag this Document dialog opens (Figure 29–10).

Figure 29–10 Tag this Document Dialog



3. Enter tag values:

   - **Document Name**—This is the document display name, a read-only value.

- **Tags—**Enter one or more tags. Separate one tag from another with a space.
- **Recommended Tags—**Recommended tags are automatically generated using a ranking algorithm. They indicate the system's best estimation of tags that suit the document you are currently tagging. Click a recommended tag to add it to the **Tags** field.
- **Shared—**Imagine that you have tagged a document with the term *essential* and selected the **Shared** checkbox. When other users search using the term *essential*, the document you tagged appears in their search results. If you clear the **Shared** checkbox, other users' search on the term *essential* does not include this document in their results (unless they, too, have tagged it *essential*).

  Regardless of whether you select or clear **Shared**, when you search on the term *essential*, the document you tagged with that term appears in your search results.

4. Click **Save** to apply the tag and close the dialog.

> **Note:** For information about tags and searches, see Section 29.2.5, "Viewing Tags and Tagged Items in Search Results."

29.2.4 Working with Tags and Tagged Items in the Tags Task Flow

This section describes how to work with tags in the Sidebar and Tags task flow. It contains the following subsections:

- Viewing Tags and Tagged Items in the Tags Task Flow
- Sorting Tags and Tagged Items
- Filtering Tags and Tagged Items
- Renaming a Tag from the Tags Task Flow
- Deleting a Tag from the Tags Task Flow

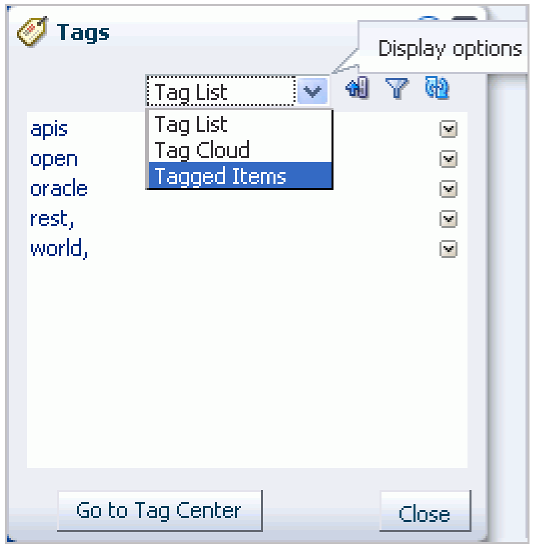
29.2.4.1 Viewing Tags and Tagged Items in the Tags Task Flow

To view tags and tagged items in the Sidebar and Tags task flow:

1. Log in to WebCenter, and expand the Tags panel in the Sidebar.
2. To view tags, select **Tags** from the display options menu.

   The task flow redraws to display all the tags you have added to your WebCenter application (Figure 29–11).

Figure 29–11 Tags Task Flow



3. To view a tag cloud depiction of your tags, select **Tag Cloud**.

   To view tagged items, select **Tagged Items** from the display options menu. The task flow redraws to display all the items that you have tagged in your WebCenter application.

29.2.4.2 Sorting Tags and Tagged Items

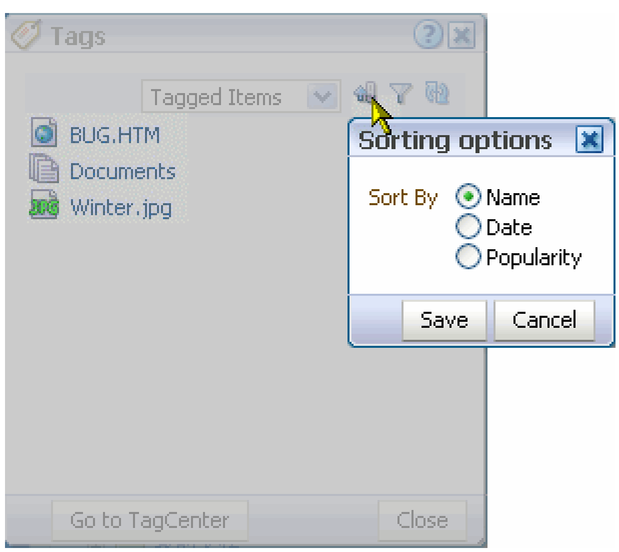
When your tag list is long, sorting the list makes it easier to find specific tags. Sort the tag list by name, date, or popularity. This section describes how.

To sort the tags in the Sidebar or Tags task flow:

1. Log in to WebCenter, and expand the Tags panel in the Sidebar.
2. Click the **Sorting options** icon at the top of the Sidebar or Tags task flow.

   The Sorting options dialog opens (Figure 29–12).

Figure 29–12 The Sorting Options Dialog



3. From the Sorting options dialog, select a sorting criteria.

   Choose from:

   - **Name**—Sorts the list alphabetically from 1 to 9 and a to z.
   - **Date**—When tags are shown, **Date** sorts the list from the tags you applied most recently to the oldest tags you applied. When tagged items are shown, **Date** sorts the list from the items you tagged most recently to the items with the oldest tags you applied.
   - **Popularity**—When tags are shown, **Popularity** sorts the list from the tags you have applied most frequently to those you have 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.

4. Click **Save** to apply your selection and close the dialog.

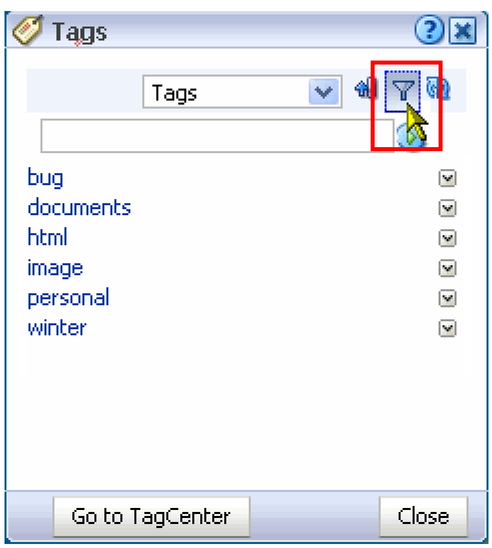
29.2.4.3 Filtering Tags and Tagged Items

Filtering provides a way to eliminate all tags on the list except for those that meet the filtering criteria. This section describes how to apply a filter to the Tags list in the Sidebar or Tags task flow:

To filter the Tags list in the Sidebar or Tags task flow:

1. Log in to WebCenter, and expand the Tags panel in the Sidebar.
2. Click the **Filter** icon to open a filtering term field (Figure 29–13).

Figure 29–13 The Filter Icon

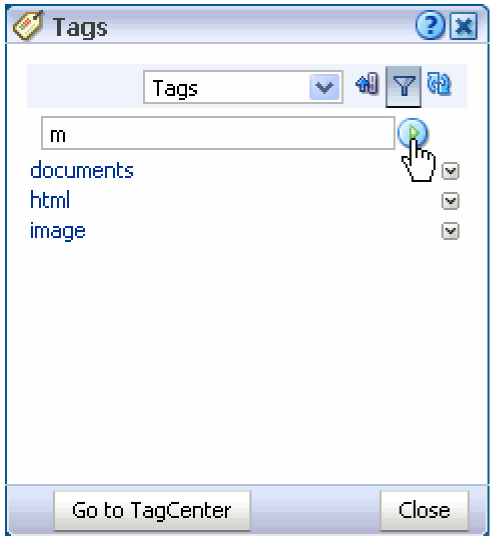


   Filtering works for both Tags and Tagged Items views of the task flow.

3. Enter a filtering term, and click the **Search** icon.

   The Tags list refreshes, showing only those tags that match or include the filtering term (Figure 29–14).

Figure 29–14 The Tags List Filtered by the Term "m"



4. Clear the filtering term, and click the **Search** icon to restore all of your tags to view.
5. Click the **Filter** icon to exit filtering.

29.2.4.4 Renaming a Tag from the Tags Task Flow

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.

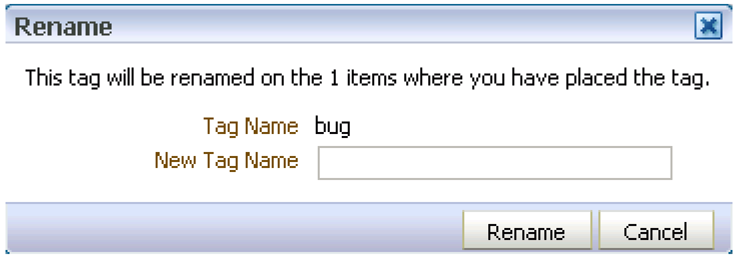
To rename tags from the Sidebar or Tags task flow:

1. Log in to WebCenter, and expand the Tags panel in the Sidebar.
2. Select **Rename** from the menu next to the tag you want to rename (Figure 29–15).

Figure 29–15 The Rename Command on a Tag Menu

3. In the Rename dialog, enter a new name for the selected tag, and click the **Rename** button (Figure 29–16).

Figure 29–16 The Rename Dialog



All of the tags you created using the original tag name, are renamed.

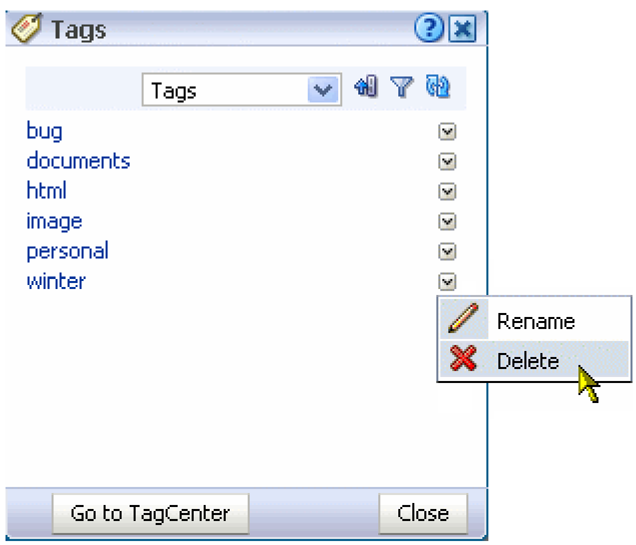
29.2.4.5 Deleting a Tag from the Tags Task Flow

When you delete a tag, it is deleted wherever you applied it. If others applied the same tag, their tags are left as is.

To delete a tag from the Sidebar or Tags task flow:

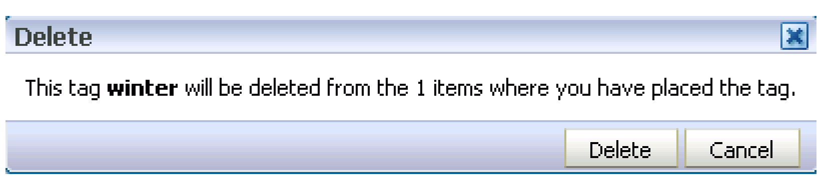
1. Log in to WebCenter, and expand the Tags panel in the Sidebar.
2. Select **Delete** from the menu next to the tag you want to delete (Figure 29–17).

Figure 29–17 The Delete Command on a Tag Menu



3. Click the **Delete** button in the Delete dialog (Figure 29–18).

Figure 29–18 The Delete Dialog



The tag is removed from the Sidebar or Tags task flow and from any items to which you applied it.

29.2.5 Viewing Tags and Tagged Items in Search Results

All search results are grouped under headings that indicate the service that provided the result. For example, document search results display under a **Documents** heading, note search results display under a **Notes** heading, and so on.

The same is true for tags. Tag search results 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*

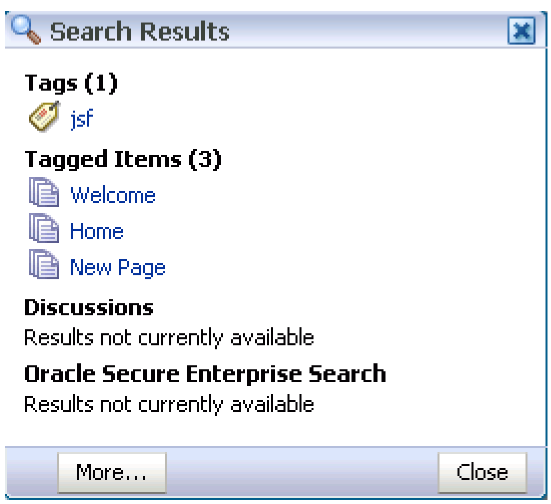
Under these headings, tag search results appear like any other search results; however, tags in tag search results behave a little differently. When you click tagged items in tag search results or when you click other types of search results, their associated content is shown. When you click a tag in tag search results, the Tag Center opens with that tag preselected.

To view tags and tagged items in search results:

1. Run a search as described in Section 28.2.2, "Searching in a WebCenter Application."

   The search results appear in the Search Results dialog (Figure 29–19), with the tag results appearing in the Tags and Tagged Items sections.

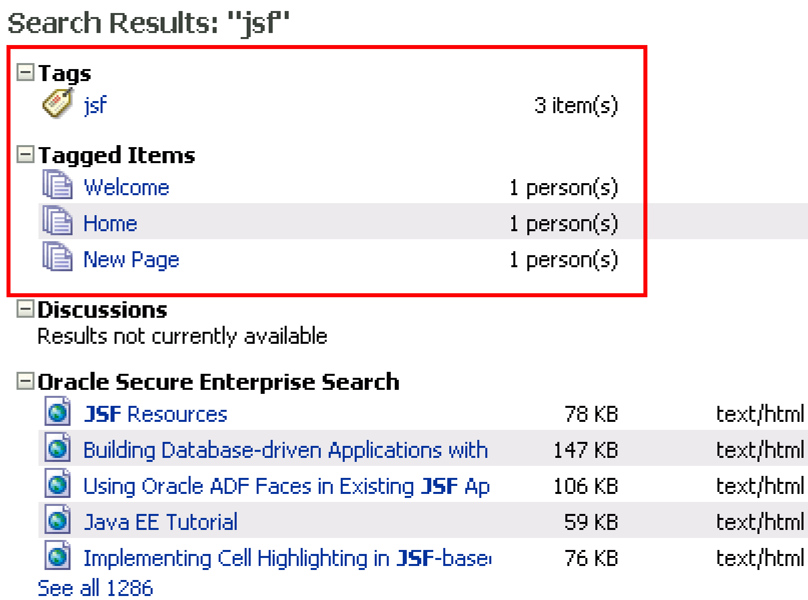
Figure 29–19 Search Results Dialog



2. To view additional information about the tags and tagged items, click the **More** button in the Search Results dialog.

   The search results open in the **Search** page (Figure 29–20). The Tags section shows the number of items to which a tag has been applied. The Tagged Items section shows the number of users who have applied a tag to an item.

Figure 29–20 Tags-Related Items in Search Results



29.2.6 Working with Tags and Tagged Items in the Tag Center

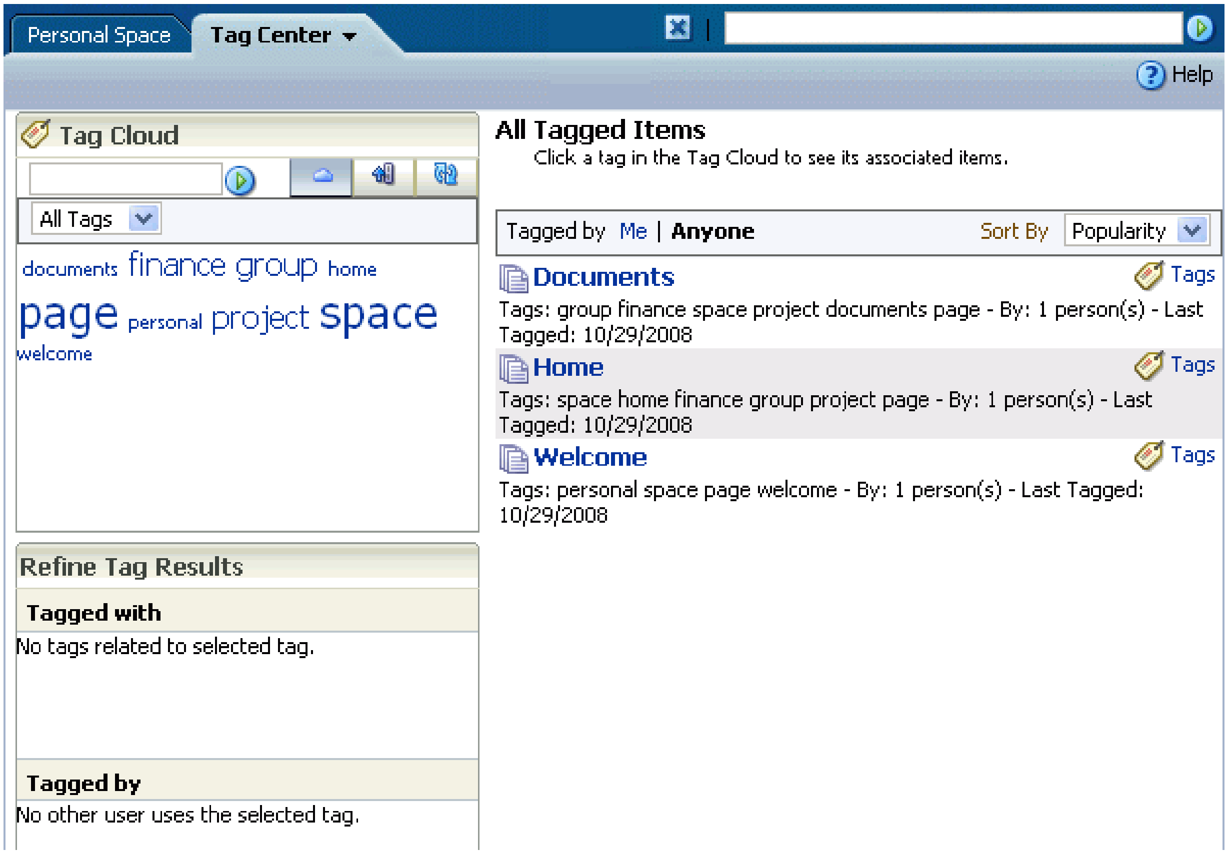
This section describes how to work with tags in the Tag Center. It contains the following subsections:

- Opening the Tag Center
- Selecting Different Views and Arrangements of Tags in the Tag Cloud
- Selecting Different Views and Arrangements of Tagged Items
- Refining the Display of Information in the Tag Center
- Discovering Who Has Used a Tag in the Tag Center
- Editing the Tags Associated with an Item from the Tag Center

29.2.6.1 Opening the Tag Center

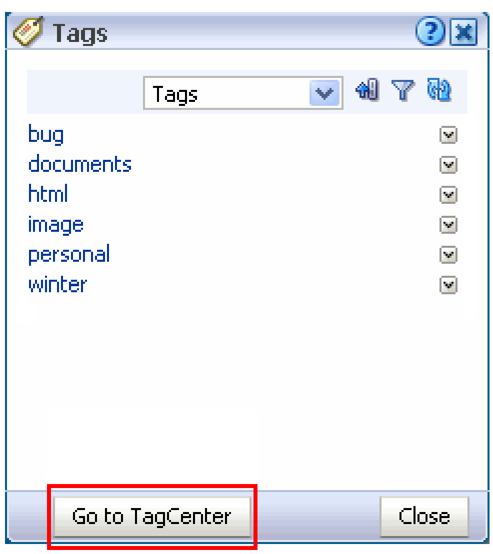
There are several ways to open the Tag Center (Figure 29–21):

Figure 29–21 The Tag Center



- Click the **Go to Tag Center** button in the Sidebar (Figure 29–22)

Figure 29–22 Go to TagCenter Button in Sidebar

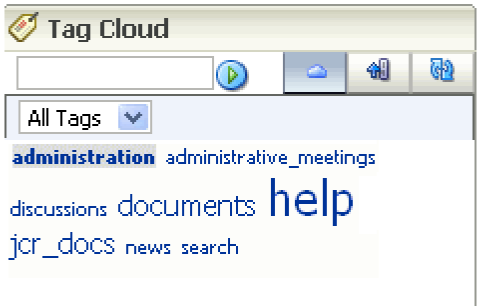


- Click a tag displayed in the Sidebar or Tags task flow
- Click a tag returned as a search result

The selected tag determines all the other tag-related information that appears in the Tag Center. For example:

- The selected tag is highlighted in the tag cloud (Figure 29–23).

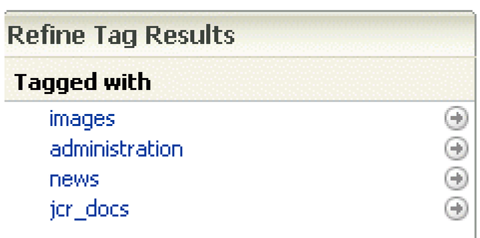
Figure 29–23 A Tag Cloud



You can select another tag in the tag cloud to change the information that is displayed in the Tag Center. Additionally, you can use the controls above the tag cloud to rearrange your tag-cloud view (see Section 29.2.6.2, "Selecting Different Views and Arrangements of Tags in the Tag Cloud").

- Other tags used on items that also use the currently-selected tag display in the **Tagged with** panel (Figure 29–24).

Figure 29–24 Tagged with Panel in the Tag Center

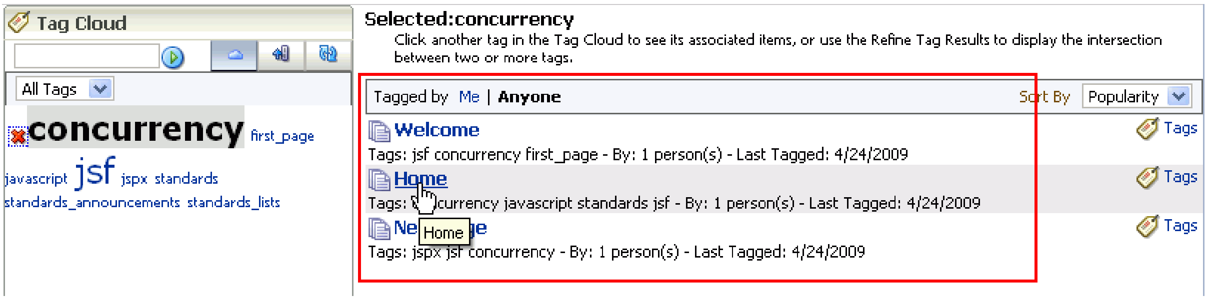


- Other users who applied the selected tag are listed in the **Tagged by** panel (Figure 29–25).

Figure 29–25 Tagged by Panel in the Tag Center

- Items tagged with the currently-selected tag appear in the right panel of the Tag Center (Figure 29–26). Click an item link to display the item.

Figure 29–26 Items Tagged with "Concurrency" in the Tag Center



29.2.6.2 Selecting Different Views and Arrangements of Tags in the Tag Cloud

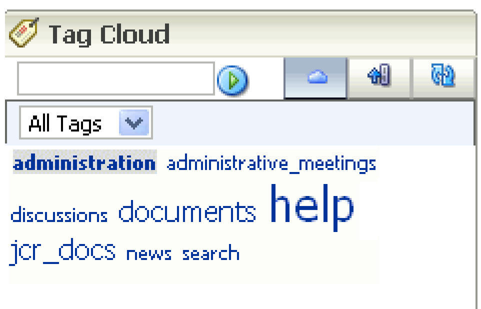
The Tag Center's Tag Cloud displays the tags currently applied to WebCenter Spaces items. You can adjust your view of the Tag Cloud using its sorting and filtering features.

To display the tag cloud:

1. Log in to WebCenter, and open the Tag Center as described in Section 29.2.6.1, "Opening the Tag Center."

   The Tag Center opens with the tag cloud displayed in the top left corner (Figure 29–27).

Figure 29–27 The Tag Cloud



To adjust your view of the tag cloud:

- To search for tags, enter a search term in the text box on the tag cloud toolbar, and click the Search button to the right of the text box.

  The tag display refreshes showing only those tags that meet the search criteria. To show just your matching tags or to remove the search criteria, select an option from the menu above the tag cloud:

  – **All Tags**—Removes the search criteria, showing every tag used in your WebCenter application

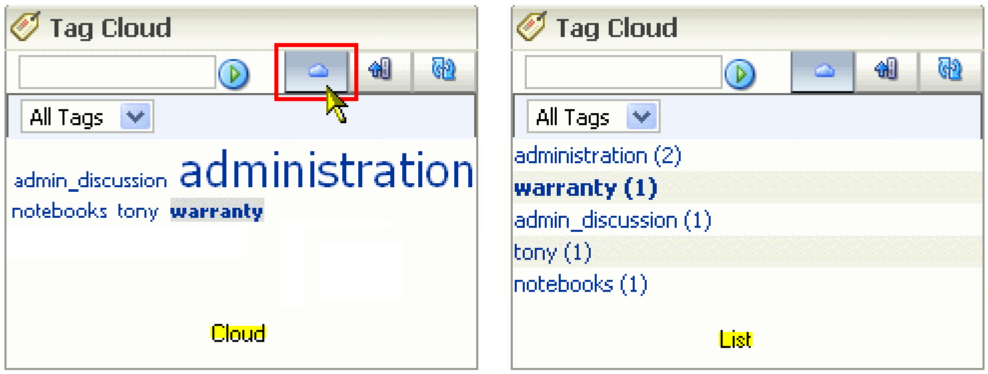
  – **My Tags**—Removes the search criteria, showing just the tags you have applied

  – **All tags containing '<search term>'**—Shows all tags in your WebCenter application that meet the search criteria

  – **My tags containing '<search term>'**—Shows just the tags which you have applied that meet the search criteria

- To switch between displaying the tags in cloud view or list view (see Figure 29–28), click the cloud icon.

Figure 29–28 Tags Displayed in a Cloud and in a List

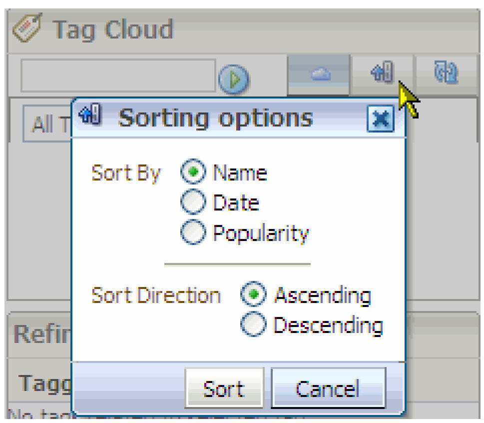


- To sort the tags:

  1. Click the **Sorting options** icon on the tag cloud toolbar.

     The Sorting options dialog opens (Figure 29–29).

Figure 29–29 The Sorting Options Dialog



  2. From the Sorting options dialog, select sorting criteria.

     Choose from:

     – **Name**—Sorts the list alphabetically. If you select **Ascending**, the list is sorted from 1 to 9 and a to z. If you select **Descending**, the list is sorted from z to a and 9 to 1.

     – **Date**—Sorts the list based on when you applied the tags. If you select **Ascending**, the tags are sorted from the ones you applied most recently to the ones applied longest ago. If you select **Descending**, the tags are sorted from the ones applied longest ago to the ones applied most recently.

     – **Popularity**—Sorts the list based on how frequently the tag has been applied. If you select **Ascending**, the tags are sorted from the ones that have been applied most frequently to the one that have been applied least frequently. If you select **Descending**, the tags are sorted from the ones applied least frequently to the ones applied most frequently.

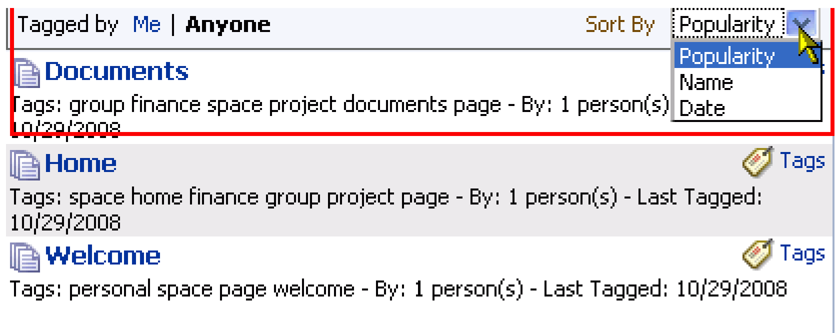
3. Click **Sort** to apply your selection and close the Sorting options dialog.

- To refresh the list of tags, click the **Refresh tags** icon.
- To show all tags or just your tags, select an option from the menu above the tag cloud:
  - **All Tags**—Shows every tag used in your WebCenter application
  - **My Tags**—Shows just the tags you have applied

29.2.6.3 Selecting Different Views and Arrangements of Tagged Items

The Tag Center provides a selection of sorting criteria to enable you to display tagged items in the way that you prefer. Using the **Tagged by** and **Sort By** options above the list of tagged items (Figure 29–30), you can select which tags to show and the order in which to show them.

Figure 29–30 Tagged by and Sort By Options for Tagged Items in the Tag Center



To select the tagged items to view, choose from:

- **Tagged by Me**—Click to show only the items that use the selected tag that you have tagged yourself.
- **Tagged by Anyone**—Click to show all items that use the selected tags.

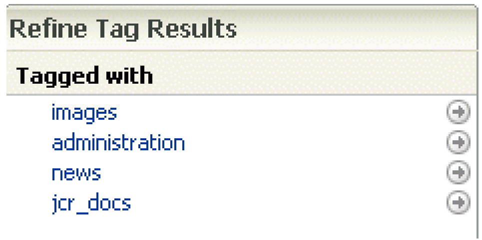
To arrange the order of displayed tagged items, choose from:

- **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 the ones tagged longest ago

29.2.6.4 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** panel (Figure 29–31).

Figure 29–31 Tagged with Panel in the Tag Center



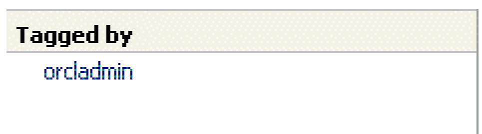
The **Tagged with** panel displays all the other tags used on objects that also use the currently-selected tag. Click a tag in the **Tagged with** panel to further restrict the information in the Tag Center to information associated with both the selected tag and the related tag you clicked.

For example, imagine that the Tag Center displays all items tagged with the term *help*. Click *jcr_docs* in the **Tagged with** panel to further refine the information in the Tag Center to information that is associated with both *help* and *jcr_docs*.

29.2.6.5 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** panel (Figure 29–32).

Figure 29–32 Tagged by Panel in the Tag Center



The **Tagged by** panel lists all other users who have applied the selected tag or tags. Click a user in the **Tagged by** panel to limit the information in the Tag Center to information tagged with the selected tag and also tagged by the user you clicked.

Using Figure 29–32 as an example, and assuming the currently-selected tag is *help*, clicking *orcladmin* shows information associated with the tag *help*, applied by *orcladmin*.

29.2.6.6 Editing the Tags Associated with an Item from the Tag Center

In the Tag Center, you can edit the tags on a particular tagged item as if you had navigated to the item itself. This section describes how.

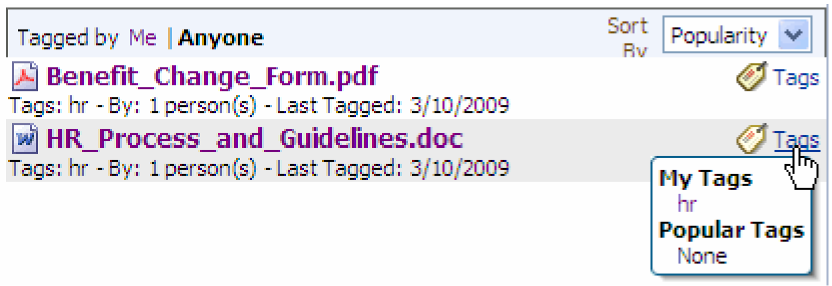
To edit the tags associated with an item from the Tag Center:

1. Log in to WebCenter, and from the Sidebar or Tags task flow, click a tag you have applied to the relevant item.

   The Tag Center opens showing tag information associated with the tag you clicked.

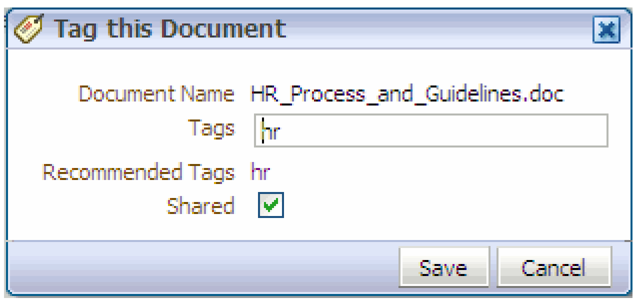
2. Click the **Tags** link in the same row as the item whose tags you want to edit (Figure 29–33).

Figure 29–33 The Tags Link in the Tag Center



The Tag this Document dialog opens (Figure 29–34)

Figure 29–34 The Tag this Document Dialog



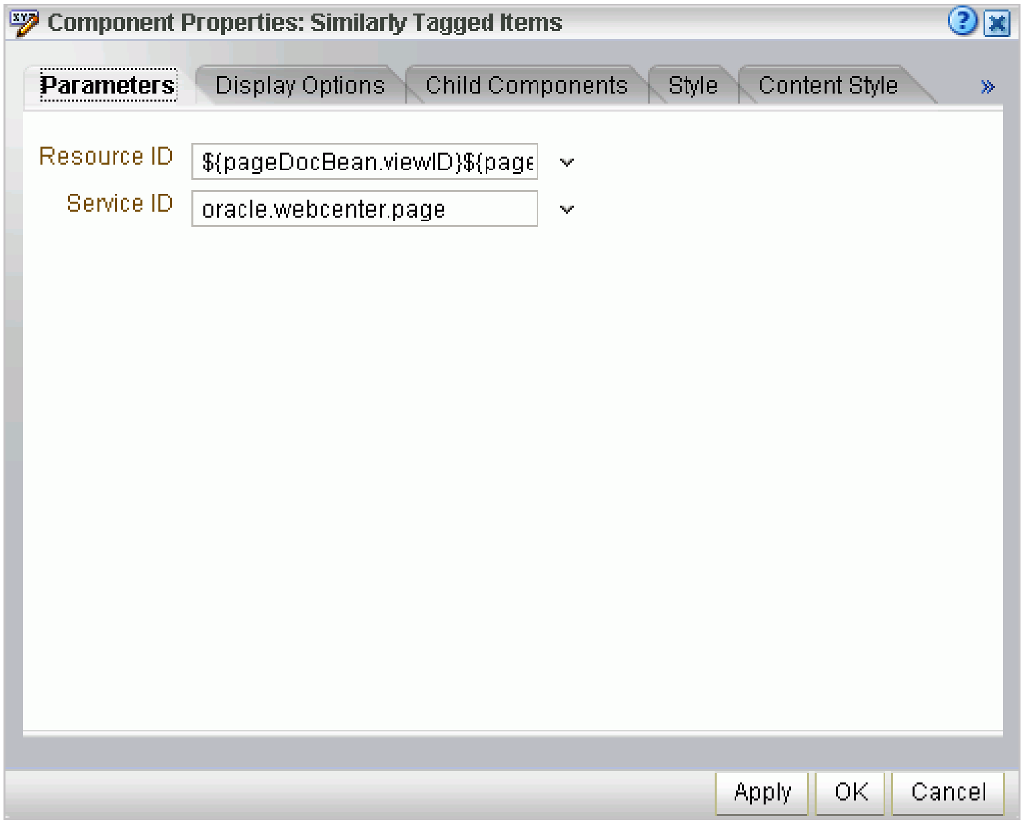
3. Revise, delete, add or otherwise alter tags as you prefer, and click **Save**.

   The changes are applied to the associated tagged item.

29.3 Setting Tags Service Task Flow Properties

The Tags service task flow has associated properties, which users with sufficient privileges can access from the Component Properties dialog in Oracle Composer (Figure 29–35). Many properties are common to all task flows, and the method for accessing task flow properties is the same from task flow to task flow. Common task flow properties and how to access them are discussed in Section 10.4, "Setting Properties on Page Content."

Figure 29–35 Similarly Tagged Items Task Flow Component Properties



The properties on the **Parameters** tab of the Component Properties dialog control the default task flow content and facilitate the wiring of the task flow to page parameters and page definition variables. These properties are unique to the task flow type. For more information, see Section 10.4.3, "Working with Component Parameters." For information about wiring pages and components, see Chapter 11, "Wiring Pages, Task Flows, Portlets, and UI Components."

Changes to the properties on the **Display Options**, **Style**, and **Content Style** tabs affect the appearance and behavior of the task flow for all users. These properties are common to all task flows. For more information, see Section 10.4.4, "Working with Component Display Options" and Section 10.4.7, "Working with Style and Content Style Properties."

The content of the **Events** tab depends on the events supported by the task flow. For more information, see Section 10.4.8, "Working with Component Contextual Events."

The **Child Components** tab displays all of the components contained within the current component. It provides controls for rearranging, showing, and hiding child components. Not all components contain children. So you may find this tab devoid of content. For more information, see Section 10.4.6, "Working with Child Components."

All properties on the **Parameters** and **Display Options** tabs provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the **Edit** icon next to a property field to open the editor. For more information about using the editor and for descriptions of common EL expressions, see Section 10.4.5, "Using Expression Language (EL) Expressions with Component Properties."

Table 29–1 describes the properties that are unique to the Tags service task flows.

Table 29–1 Tags Service Task Flow Properties: Parameters Tab

Property	Description	Task Flow
`Resource ID`	Unique ID of the item or resource within a given service that is used to find similarly tagged items. This value is set automatically. Do not change this value unless you want to show items similar to a different resource.	Similarly Tagged Items
`Service ID`	Unique ID of the service that owns the resource for which to return similarly tagged items. This value is set automatically. Do not change this value unless you want to show items similar to a different resource belonging to a different service.	Similarly Tagged Items Tags

Note: You should not change the Tags service task flow properties unless you want to show items from a different resource or different service.

30

Working with Wikis and Blogs

The chapter describes how to expose wikis and blogs in WebCenter Spaces and create and manage wiki pages and blog entries.

This chapter includes the following sections:

- Section 30.1, "What You Should Know About Wikis and Blogs"
- Section 30.2, "Exposing Wikis and Blogs in WebCenter Spaces"
- Section 30.3, "Working with Wiki and Blog Content"

Audience

This chapter is intended for WebCenter Spaces users interested in adding, editing, and managing wiki pages and blogs. Much of this information also applies to custom WebCenter applications, though it is written with WebCenter Spaces users in mind. For information about custom WebCenter applications, see the "Integrating Oracle WebCenter Wiki and Blog Server" chapter in *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter*.

30.1 What You Should Know About Wikis and Blogs

Wiki pages are web pages that offer in-place editing using HTML or a simple mark-up language. Users with sufficient permission on a wiki page can add, revise, or remove content. Everyone cooperates in creating content that is relevant, useful, and up-to-date. Wikipedia is an excellent example of a wiki (`http://www.wikipedia.com`). 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 contrast, blogs are 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.

The same mechanism that produces wiki capability in WebCenter applications, also produces blog capability: the Oracle WebCenter Wiki and Blog Server. The Oracle WebCenter Wiki and Blog Server categorizes its content into domains and pages. Administrators create domains, and authorized users create pages within a given domain. The administrator can also create a menu for each domain, which enables users to quickly access domain pages and other built-in functions, such as popular pages. The wiki tracks every version of the page, including its authors and creation and revision dates.

In a WebCenter Spaces application, domain creation is automatic. You can expose wikis in group spaces. You can have multiple wikis per group space or per page. You can expose wikis and blogs through Wiki or Blog page styles or a URL-consuming portlet. To refine the behavior of a URL target, you can add query string parameters to the URL. For information about query string parameters that are relevant to wiki pages and blogs, see Table 30–2, " Query String Parameters in WebCenter Spaces Wiki and Blog URLs".

In your WebCenter Spaces applications, you can configure wikis and blogs to display as many or as few wiki and blog tools as you like. Use the query string parameter `inline` to control how much wiki and blog capability to render. This section describes the wiki and blog modes.

This section contains the following subsections:

- Section 30.1.1, "About Wiki Modes"
- Section 30.1.2, "About Blog Modes"

30.1.1 About Wiki Modes

Wikis epitomize the concepts of community and collaboration by allowing all authorized community members to contribute their information to the greater body of knowledge. For example, one group member might create a *Frequently Asked Questions* document and invite all members to add to or revise the information. The target audience might also be allowed to update the document. However, wiki page permissions can block users from editing the document if this is required.

In WebCenter Spaces applications, you can expose wikis in group spaces. Wiki pages exposed in an applications provide three main modes: View, Edit, and Info, as shown in Figure 30–1. Use View mode to view page content. Use Edit mode to revise page content, and use Info mode to view information about the current page, including its creator and date created, its modifier and date modified, total number of times edited, and the like (for information, see Section 30.3.1.4, "Accessing Information About a Wiki Page"). Info mode additionally provides a means of restoring an earlier version of the current page (for information, see Section 30.3.1.6, "Restoring an Older Version of a Wiki Page").

To control how much wiki capability to render in your application, you can use any of the following modes for the `inline` query string parameter: `inline=0`, `inline=1`, or `inline=2`.

The `inline=0` mode is used for wiki administrators. A wiki administrator is a user who has been assigned an administrative role on the Oracle WebCenter Wiki and Blog Server. The `inline=0` mode includes a banner and a toolbar of useful links across the top of the page, a search feature, and additional navigation under the **General** heading. Figure 30–1 depicts a wiki page rendered with `inline=0`.

The influence of a parameter value is maintained over the course of a full browser session, no matter whether you navigate away from and back to the page where the value is applied.

Figure 30–1 Wiki Page Rendered in Inline=0 Mode

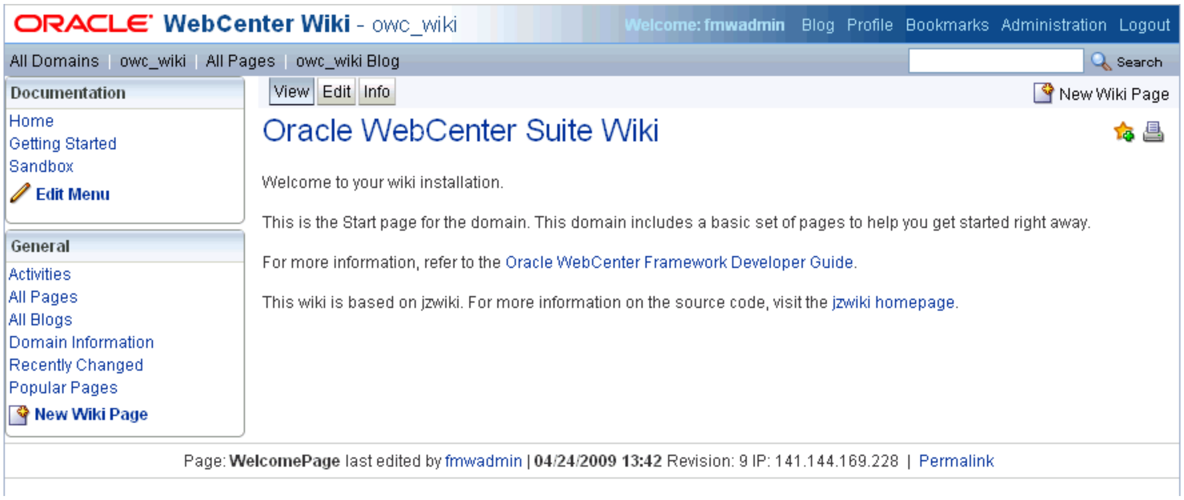
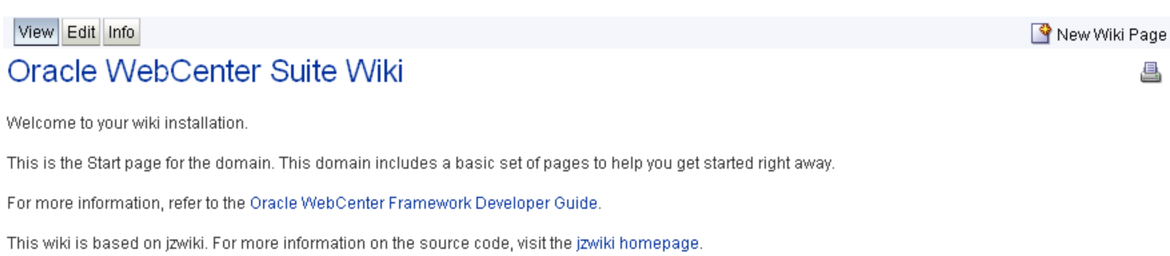


Figure 30–2 depicts a wiki page rendered in `inline=1` mode. Note the absence of the banner and the rows of links. The `inline=1` mode is the recommended mode for integrating wikis and blogs into WebCenter Spaces applications.

Figure 30–2 Wiki Page Rendered in Inline=1 Mode

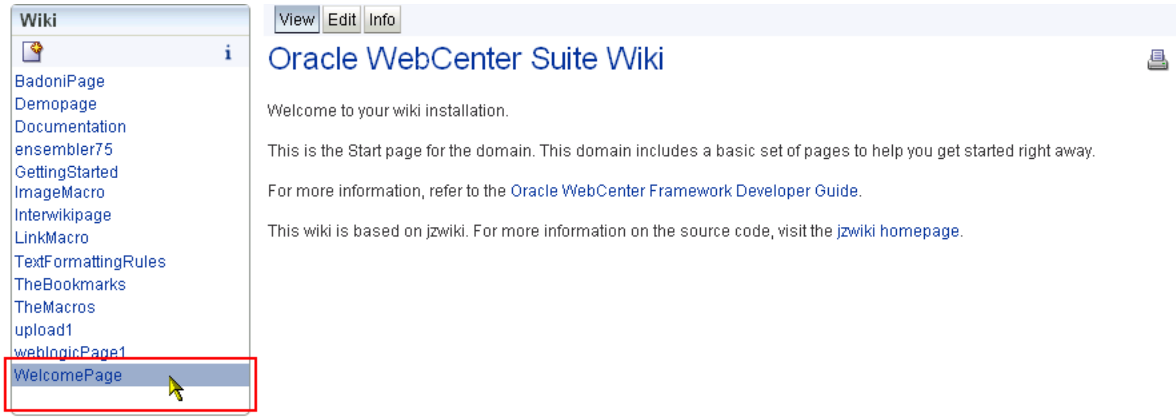
Figure 30–3 depicts a wiki page rendered in `inline=2` mode. Note the absence of left-column navigation. Use the `inline=2` mode only for wiki pages where you plan to exclude any additional form of wiki navigation.

Figure 30–3 Wiki Page Rendered in Inline=2 Mode



Wikis provide a swift method for returning to their home pages. For a wiki, the home page is the welcome page of the current domain. To return to a wiki home page, click the **WelcomePage** link or its equivalent in left-column navigation (Figure 30–4).

Figure 30–4 WelcomePage Link on a Wiki Page



30.1.2 About Blog Modes

Where wikis embody the concepts of community and collaboration, blogs embody the concepts of individual expertise and information sharing. Blogs provide a useful tool for evangelizing technology, technique, or technical expertise or simply for expressing opinions. Blogs can come from the perspective of one or more subject matter experts or from one person with a lot of opinions. Blogs, like wikis, can be private or published to a wider audience. Typically, blogs additionally invite the entry of reader comments.

In WebCenter Spaces applications, you can expose blogs in both personal and group spaces. You can have multiple blogs per group space, personal space, or page.

Like wikis, blogs present additional information depending on the value you provide for the `inline` query string parameter. For more information, see Table 30–2, " Query String Parameters in WebCenter Spaces Wiki and Blog URLs".

Figure 30–5 depicts a blog rendered in `inline=0` mode. Use `inline=0` mode for blog administrators. It includes a banner and toolbar with useful links and a search feature. Additionally, it provides the **General** heading with its associated list of blog management and monitoring links (for more information, see Section 30.3.2.6, "Viewing Information About a Blog").

Figure 30–5 Blog Rendered in Inline=0 Mode

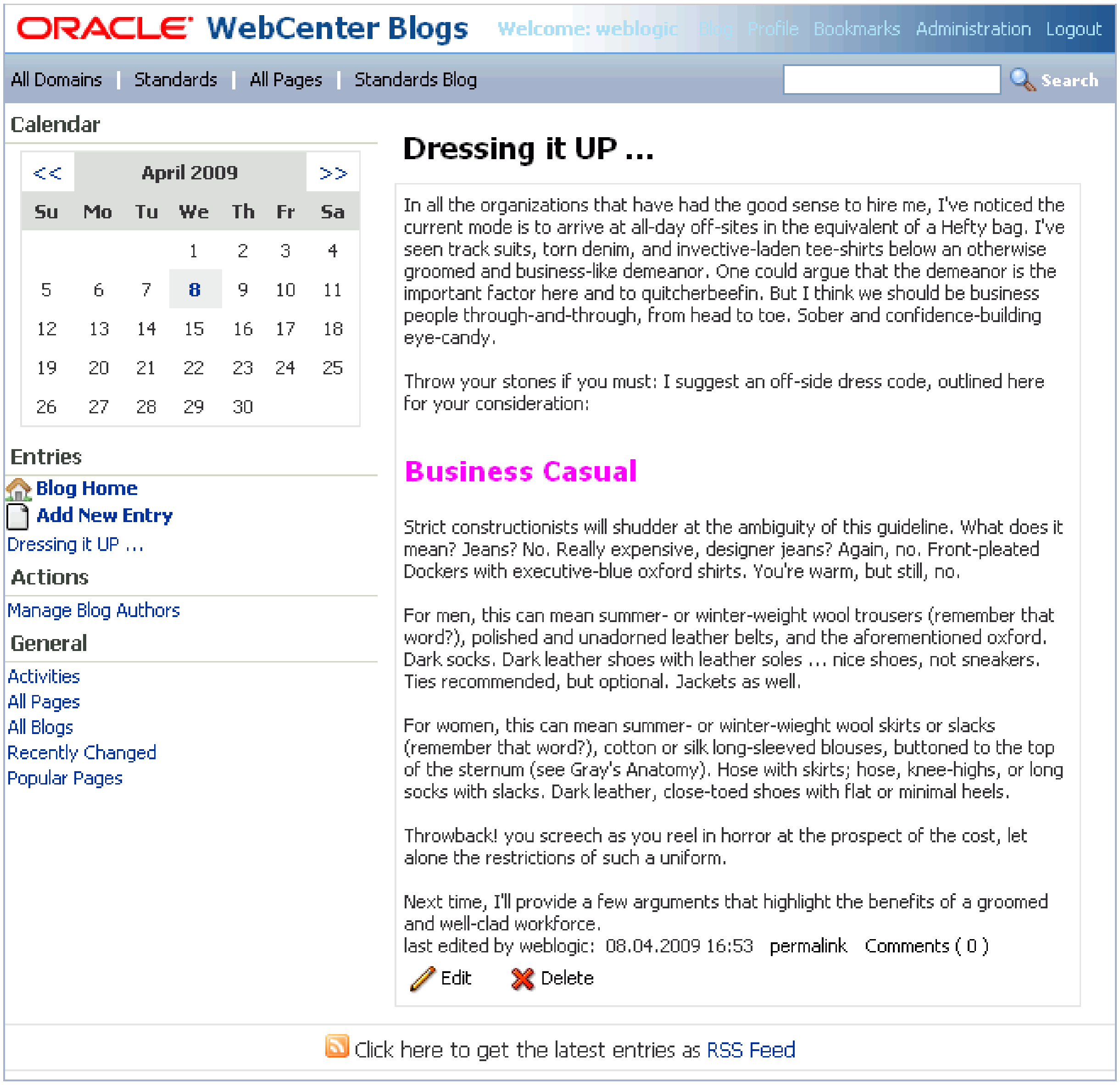
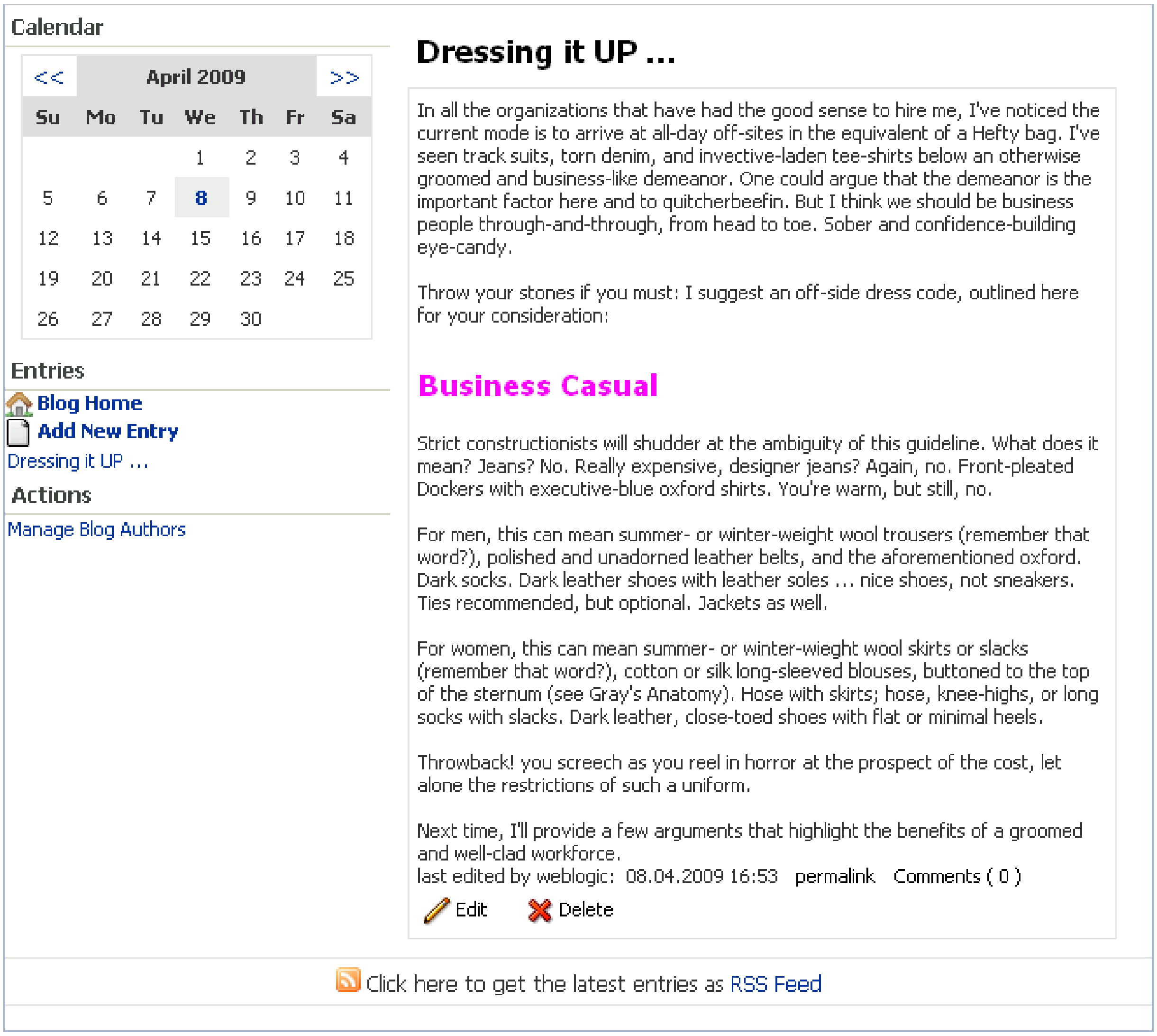


Figure 30–6 depicts a blog rendered in `inline=1` mode. Notice the absence of the page banner, links, search, and the **General** heading with all of its associated links. The `inline=1` mode is the recommended mode for integrating wikis and blogs into your WebCenter Spaces applications.

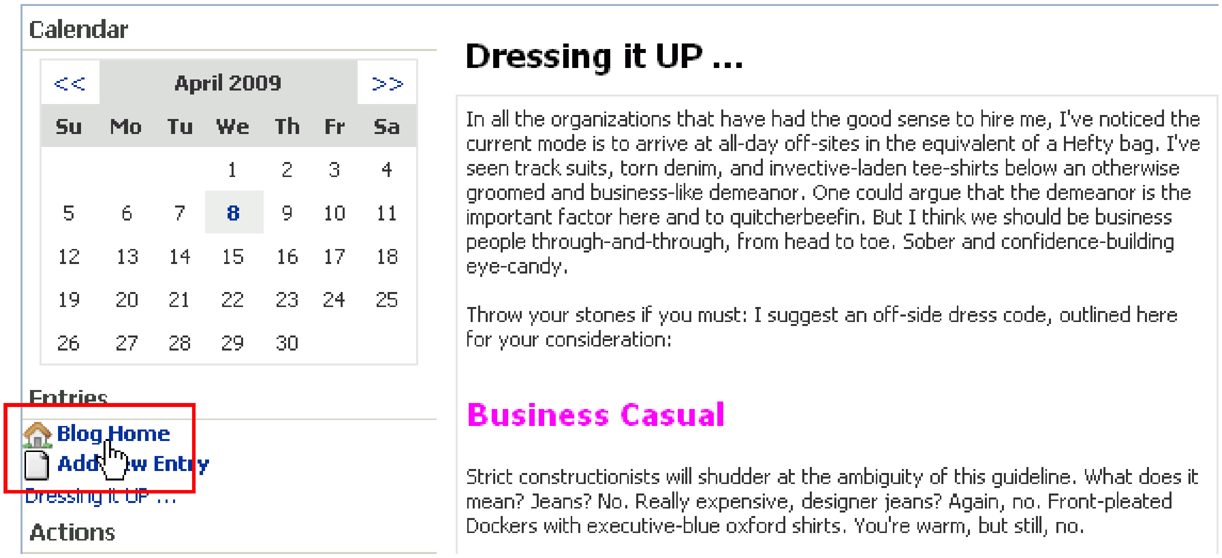
Figure 30–6 Blog Rendered in Inline=1 Mode



Blogs rendered in `inline=2` mode render exactly like those rendered in `inline=1`. That is, the two are interchangeable.

Blogs provide a swift method for returning to their home pages. For a blog, the home page is the blog home page of a domain. To return to a blog home page, click the **Blog Home** link or its equivalent in left-column navigation (Figure 30–7).

Figure 30–7 Blog Home Link



30.2 Exposing Wikis and Blogs in WebCenter Spaces

You can expose wikis and blogs within the context of a WebCenter Spaces page. You can also link to specific wiki and blog pages from other application locations.

This section contains the following subsections:

- Section 30.2.1, "Exposing a Wiki or a Blog on a WebCenter Spaces Page"
- Section 30.2.2, "Creating a Link to a Wiki or Blog in a WebCenter Spaces Application"
- Section 30.2.3, "Accessing Information About a Wiki Domain"

30.2.1 Exposing a Wiki or a Blog on a WebCenter Spaces Page

In a WebCenter Spaces application, you can expose wikis and blogs through Wiki or Blog page styles or a URL-consuming portlet. To expose a wiki page or a blog in a WebCenter Spaces application, you create a page using the Wiki or Blog page style; the appropriate URL to the Oracle WebCenter Wiki and Blog Server is automatically set up for you. You can choose to add the required details for your newly created wiki or blog. If you want to expose an existing wiki or blog, then you *must* edit the URL to specify the path to that wiki page or blog.

Note: If a wiki or blog is created outside of WebCenter Spaces or created within WebCenter Spaces but through a manual URL that does not include the `wcURL` query string parameter, you can expose that wiki or blog in Spaces. Although this wiki or blog shows up in search results, it does not function like wiki pages and blogs created by using the page styles or `wcURL`. In these cases, clicking on a search result does not display the Spaces page where you exposed the wiki or blog.

When you add a blog to a page, by default users do not have permission to create blog entries. Before users can add blog entries, you or your application administrator must set up permissions on Oracle WebCenter Wiki and Blog Server to allow all users to create blog entries. Specifically, the `BlogAdmin` permission must be granted to the `USER` role. For more information, see the "Managing Users and Roles" section in the *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter*.

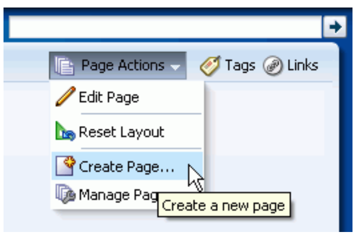
Note: This section steps you through default page creation. You may care to take a more customized approach. For information about different page-creation options, see Chapter 8, "Creating, Editing, and Deleting Pages."

30.2.1.1 Exposing a New Wiki or Blog

To expose a new wiki or blog on a WebCenter Spaces application page:

1. Log in to WebCenter Spaces, and go to the location in your application where you want to expose a wiki or a blog.
2. From the **Page Actions** menu, select the **Create Page** command (Figure 30–8).

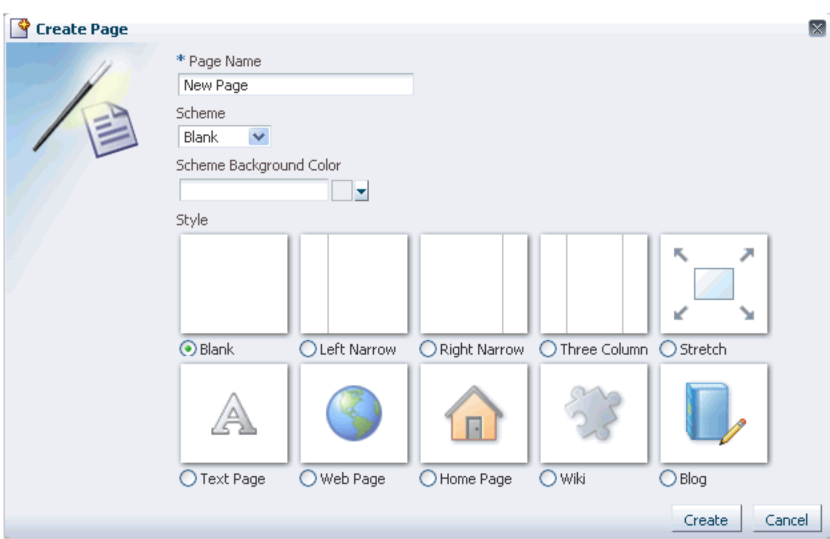
Figure 30–8 Create Page Command on the Page Actions Menu



3. In the Create Page dialog (Figure 30–9), in the **Page Name** field, enter a display name for the page.

   The name you enter here appears on the page's tab and in the Manage Pages dialog.

Figure 30–9 Create Page Dialog



4. Optionally, from the **Scheme** list, select a page design scheme.

The **Scheme** list provides a selection of background color and image schemes for the new page. For a preview of seeded schemes, see Table 7–1, " Seeded Page Schemes".

5. From the **Style** options, select **Wiki** to expose a wiki. If you want to expose a blog, select **Blog**.
6. Click **Create**.

   Based on your selection, either a wiki page titled **WelcomePage** or a blog is created and displayed in Oracle Composer (Figure 30–10). You can choose to add the required details for your newly created wiki or blog. For information, see Section 30.3.1.2, "Editing a Wiki Page" or Section 30.3.2.3, "Editing a Blog Entry."

30.2.1.2 Exposing an Existing Wiki or Blog

If you want to expose an existing wiki or blog, then you must edit the URL to specify the path to that wiki page or blog.

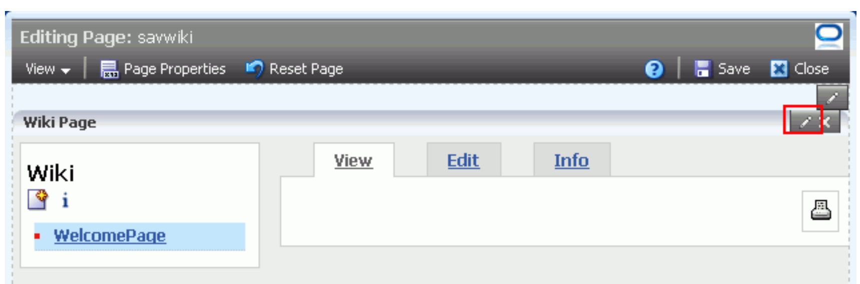
To expose an existing wiki or blog:

1. Perform the steps listed in Section 30.2.1.1, "Exposing a New Wiki or Blog."

   > **Note:** If Single Sign-On is not configured for Oracle WebCenter, then you may require to log in to Oracle WebCenter Wiki and Blog Server to access the wiki page.

2. In Oracle Composer, click the **Edit** icon on your wiki or blog page, as shown in Figure 30–10.

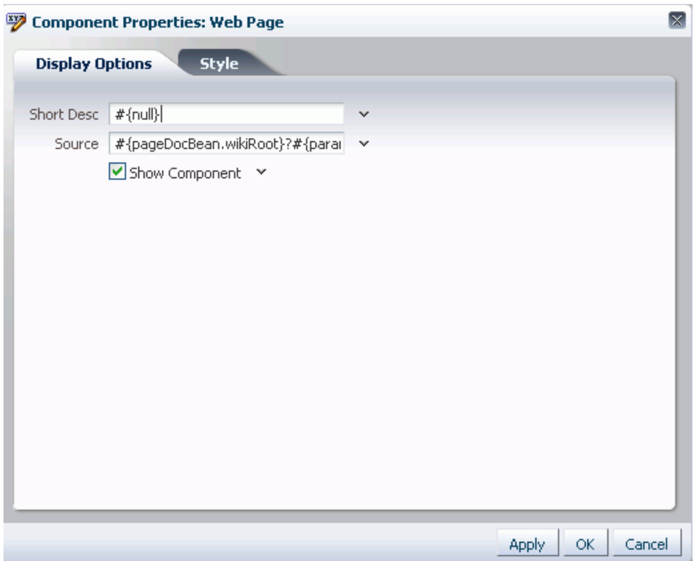
Figure 30–10 Edit Icon on a Wiki Page in Oracle Composer



3. In the Component Properties dialog (Figure 30–11), in the **Short Desc** field, enter `ALT` text for the page.

   For example, `FinanceProject wiki`.

Figure 30–11 Component Properties Dialog



4. In the **Source** field, enter the URL of the wiki or blog page you want to expose.

   Table 30–1 illustrates the various URL formats to use, depending on the type of space and the type of site (wiki or blog) you are exposing.

Table 30–1 URL Formats for Exposing Wikis and Blogs in WebCenter Spaces

Scope	Type	URL Format
Group	Wiki	`http://`*`server:port`*`/owc_wiki/page/show.jz?inline=1&scope=#{communityContext.communityName}` The variable `#{communityContext.communityName}` is literal. Enter it exactly as it appears here.
Group	Blog	`http://`*`server:port`*`/owc_wiki/blog/list.jz?inline=1&scope=#{communityContext.communityName}` The variable `#{communityContext.communityName}` is literal. Enter it exactly as it appears here.
Personal	Blog	`http://`*`server:port`*`/owc_wiki/blog/list.jz?inline=1&name=#{facesContext.externalContext.remoteUser}` The variable `#{facesContext.externalContext.remoteUser}` is literal. Enter it exactly as it appears here.

Included in these URLs are query string parameters that provide configuration information for the link target. Parameters like `inline` and `theme` are session-level variables. After the URL passes session-level variables to the target, the variable values continue to apply even if you leave and return to the original target page. A way to change a session level variable is to enter a different value in the target URL, for example `theme=default`.

Table 30–2 lists and describes the query string parameters that you can use with WebCenter Spaces wiki and blog URLs.

Table 30–2 Query String Parameters in WebCenter Spaces Wiki and Blog URLs

Parameter	Description
`inline`	`http://server:port/owc_wiki/blog/list.jz?inline=1&name=#{facesContext.externalContext.remoteUser}` ■ Value of `0` displays the Oracle WebCenter Wiki and Blog Server default user interface and features, including a menu wiki page in the current domain. Use the menu page to create custom navigation links. The mode `inline=0` is the recommended mode for wiki administrators. ■ Value of `1` strips away nonessential wiki and blog chrome. It also renders left-side navigation that lists all wiki or blog pages within the current domain. ■ Value of `2` is similar to `inline=1`, except it turns off left-side navigation. For information about how the wiki and blog interface looks in various `inline` modes, see Section 30.1.1, "About Wiki Modes" and Section 30.1.2, "About Blog Modes."
`name`	`http://server:port/owc_wiki/blog/list.jz?inline=1&name=#{facesContext.externalContext.remoteUser}` Facilitates navigation to a specific blog, attributed either to a particular domain or user. The default value, `#{facesContext.externalContext.remoteUser}` delivers the current user's user name. Enter this Expression Language expression as it appears here.
`page`	`http://server:port/owc_wiki/page/show.jz?inline=1&page=domain:wikiPageName` Facilitates navigation to a specific wiki page in a specified domain. This variable follows the syntax: `page=`*`domain:wikiPageName`*. For *`domain`*, enter the domain under which the wiki page resides; for *`wikiPageName`*, enter the display name of the wiki page. For more information, see Section 30.2.2, "Creating a Link to a Wiki or Blog in a WebCenter Spaces Application."

Table 30–2 (Cont.) Query String Parameters in WebCenter Spaces Wiki and Blog URLs

Parameter	Description
`wcURL`	This parameter is useful for integrating wiki pages into an application when you want wiki links to navigate to an embedded wiki page rather than directly to the page on the Oracle WebCenter Wiki and Blog Server. Enables the specification of an encoded URL to which a domain and page are appended when the Oracle WebCenter Wiki and Blog Server renders links to wiki pages. This applies only when `inline=1`.
`scope`	`http://`*`server:port`*`/owc_wiki/page/show.jz?inline=1&scope=#{communityContext.communityName}` Creates a new domain with the name specified for the `scope` parameter. If such a named domain exists, navigates to it. If the `scope` parameter creates the domain, then it also creates the home page (`WelcomePage`) and redirects the user to that page. Domain creators can specify another name besides `WelcomePage` for the start (default) page. The default value, `#{communityContext.communityName}` delivers the domain of the group space within which you are creating the wiki or blog. Enter this Expression Language expression as it appears here.

Table 30–2 (Cont.) Query String Parameters in WebCenter Spaces Wiki and Blog URLs

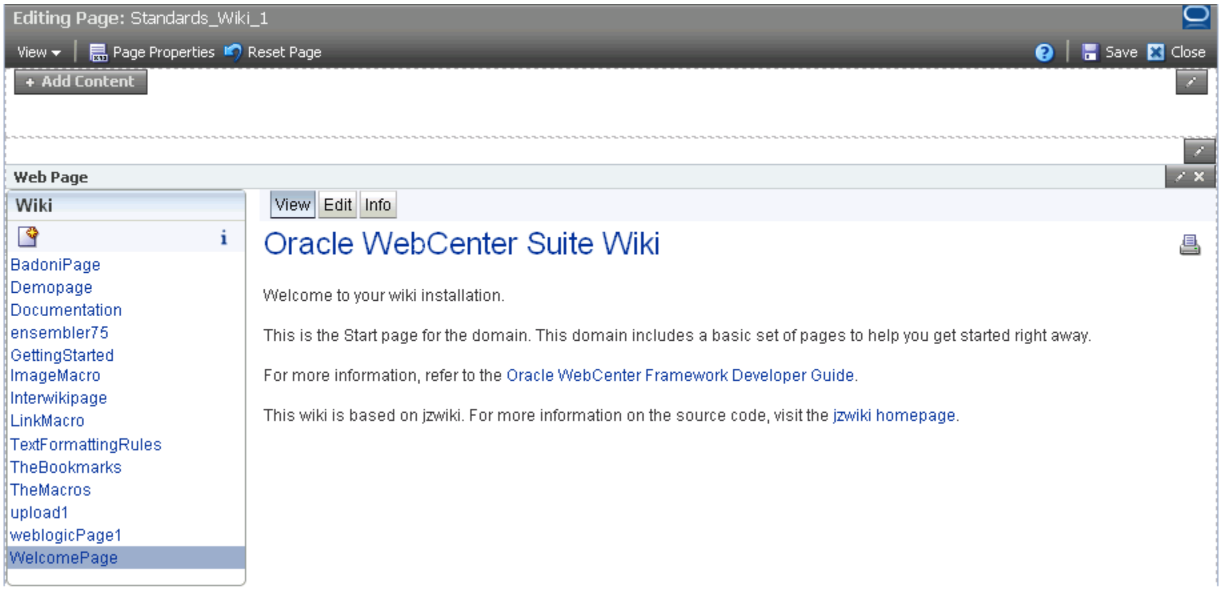
Parameter	Description

`theme`	`http://`*`server:port`*`/owc_wiki/page/show.jz?inline=1&scope=#{communityContext.communityName}&theme=blue`
	
	Dynamically applies the specified wiki theme to the requested page (theme must be present on both the Oracle WebCenter Wiki and Blog Server and the server where your WebCenter Spaces application is deployed).
	■ `none` turns off the cascading style sheet (CSS).
	■ `default` applies the default theme specified on the wiki and blog server.
	■ *`theme_name`* applies the specified wiki theme/CSS to the wiki page and all its children.
	Seeded wiki themes include the following (use the value in parenthesis in the parameter):
	■ Bighorn (`bighorn`)
	■ Blue (`blue`)
	■ Blue Sky (`bluesky`)
	■ Deep Sea (`deepsea`)
	■ Dew (`olive`)
	■ Dusk (`monochrome`)
	■ Flatirons (`flatirons`)
	■ Midnight (`onyx`)
	■ Mist (`white`)
	■ Red (`red`)
	■ Sand (`sand`)
	■ Storm (`storm`)
	■ Tech Gray (`tech_gray`)
	■ WebCenter Default (`default`)
	■ WebCenter Theme (`webcenter`)
	■ Wiki Default (`wiki`)
	Tip: To use the theme currently used by your application, add the following Expression Language expression to your wiki or blog URL:
	`theme=#{adfFacesContext.skinFamily}`
	
	For information about other useful Expression Language expressions, see Section 10.4.5, "Using Expression Language (EL) Expressions with Component Properties."

5. Click **OK** to save your changes and exit the Component Properties dialog.

   The page refreshes, exposing your wiki or blog (Figure 30–12).

Figure 30–12 A New Wiki Page on a WebCenter Spaces Page



Note: After you have exposed a wiki page or a blog, you can start working with the wiki and blog content. For information, see Section 30.3, "Working with Wiki and Blog Content."

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6. Click **Close** to exit Oracle Composer.

When you expose a wiki or a blog into your WebCenter Spaces application, it renders within the application context. For example, when a user navigates to a WebCenter application page, the user views the wiki within the context of that page.

Note: The wiki and blog content that is exposed within the context of an application page is not affected by the controls associated with the page. For example, the Edit Page command on a Page Actions menu enables you to edit the WebCenter Spaces page that exposes a wiki or a blog, but does not enable you to edit the wiki or blog itself.

For information about editing a wiki page, see Section 30.3.1.2, "Editing a Wiki Page." For information about editing a blog entry, see Section 30.3.2.3, "Editing a Blog Entry."

Note: In a WebCenter Spaces application, on the web page that exposes a wiki page or a blog, the `#{communityContext.communityName}` EL passes the group space name (like GS1) as the wiki domain. If you rename the group space (like GS1 renamed to GS2), then the EL points to the new name (GS2). However, the existing wiki pages that you created in GS1 are not listed in your application, even though these pages exist on Oracle WebCenter Wiki and Blog Server. To resolve this issue, you must change the URL of the web page in your application to point to the earlier wiki domain, that is GS1.

30.2.2 Creating a Link to a Wiki or Blog in a WebCenter Spaces Application

In developing your wikis and blogs, you may want to create links within and to the wiki or blog from a WebCenter Spaces application page. Create internal links using wiki mark-up (for information, see Section 30.3.4, "Using Wiki Mark-Up"). Create links to wikis and blogs from WebCenter Spaces application pages using the Hyperlink or the Image layout component.

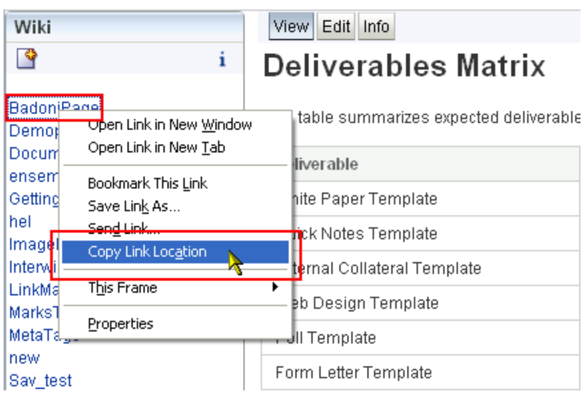
This section specifically describes the process of adding and configuring a Hyperlink layout component to an application page. To add an Image layout component, follow the steps described in this section, but add an Image in lieu of a Hyperlink layout component.

To link to a wiki page or a blog from a WebCenter Spaces application page:

1. Log in to Oracle WebCenter Wiki and Blog Server, navigate to the wiki or blog to which you want to create a hyperlink, and copy its link location.

   One way to copy a wiki or blog page link location is to right-click the target page on the navigation panel located on the left side of the wiki or blog page (Figure 30–13).

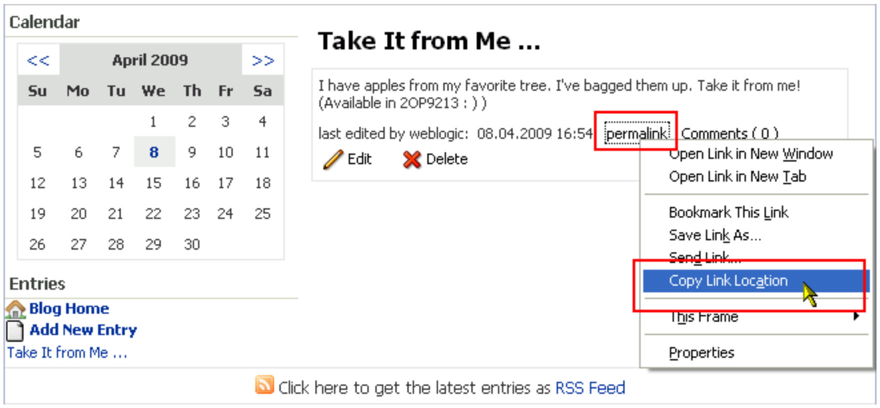
Figure 30–13 Copying a Wiki Page Link Location Through a Firefox Browser



> **Note:** For the left-side navigation panel to display, the `inline` parameter in the wiki or blog URL must be set to `1`. For more information, see Table 30–2, " Query String Parameters in WebCenter Spaces Wiki and Blog URLs".

   To get a URL for a specific blog entry, you can also copy the link location of the **permalink** that renders just below the blog entry. Use your browser's context menu to copy the target page's URL (Figure 30–14).

Figure 30–14 Permalink on a Blog Entry



2. Log in to WebCenter Spaces, go to the page where you want to add a hyperlink.

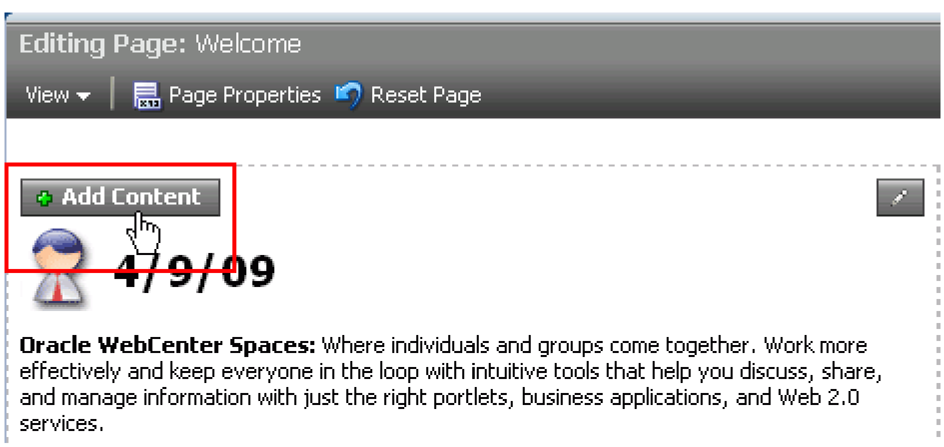
   For information about locating pages, see Section 2.5, "Hiding, Showing, Opening, and Closing Pages."

3. From the **Page Actions** menu, select **Edit Page** to open Oracle Composer.

   > **Note:** If the **Edit Page** command is not available on the **Page Actions** menu or the **Page Actions** menu does not display, it is likely that you do not have sufficient page access privileges. If this is the case, ask your application administrator for the privilege to edit pages. For information, see Section 2.8, "Contacting Your Application Administrator."

4. In Oracle Composer, click the **Add Content** button associated with the region to which to add the hyperlink (Figure 30–15).

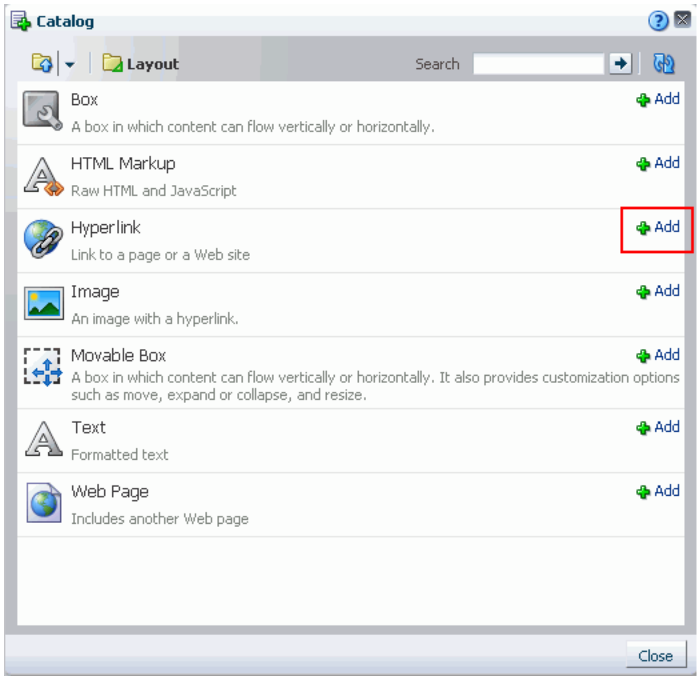
Figure 30–15 Add Content Button on a WebCenter Spaces Content Region



5. In the Catalog, click the **Open** link next to **Layout**.

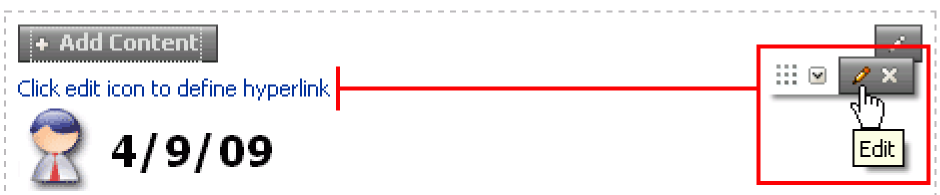
6. In the **Layout** folder, click the **Add** link next to the **Hyperlink** layout component (Figure 30–16).

Figure 30–16 Add Link for Hyperlink in the Oracle Composer Catalog

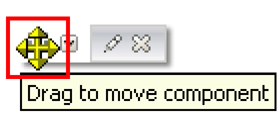


7. Click **Close** to close the Catalog.
8. Click the **Edit** icon associated with the hyperlink you added to the page (Figure 30–17).

Figure 30–17 Floating Header on a Hyperlink Layout Component



Note: By default, Hyperlink layout components display a floating header that appears when you roll your mouse pointer over the hyperlink. You can additionally use the handle on the header to reposition the hyperlink within the current region or within another region.

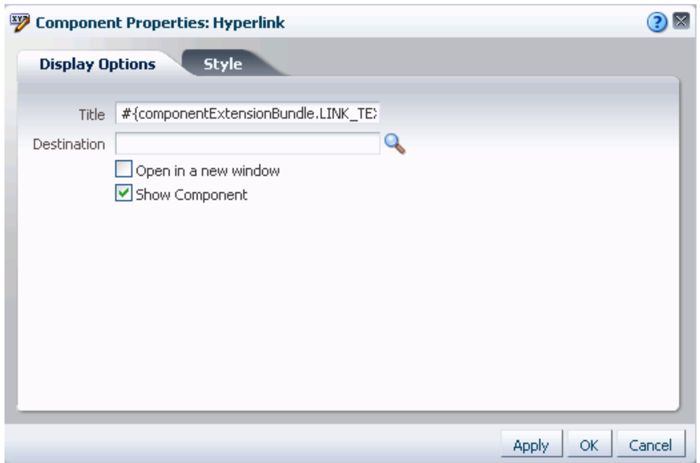


---

9. In the Component Properties dialog, in the **Title** field, enter the link text for the hyperlink (Figure 30–18).

   For example, `Team minutes for Finance Project`.

Figure 30–18 Hyperlink Component Properties



10. In the **Destination** field, enter the target URL for the wiki page or the blog.

    Paste the URL you copied in step 1, adding the parameter `inline=1`. Follow a format described in Table 30–3.

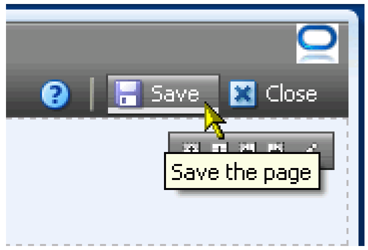
Table 30–3 Formats for Hyperlinks to Wikis and Blogs

Target	Scope	URL Format
wiki	group	http://*server:port*/owc_wiki/page/show.jz?inline=1&page=*domain:wikiPageName*
blog	group	http://*server:port*/owc_wiki/blog/list.jz?inline=1&name=*domain*
blog	personal	http://*server:port*/owc_wiki/blog/list.jz?inline=1&name=*user*

In these examples, *domain* is the name of the group space where the wiki or blog is exposed. Enter underscores for any spaces included in the group space display name; for example, `Finance Project` becomes `Finance_Project`. For the variable *wikiPageName*, enter the name of the wiki page you are targeting. The wiki page name is used in the wiki's left-panel navigation. It may differ from the page display name, which you do not use. For the variable, *user*, enter the user name of the author whose blog you want to view. See Table 30–2 for additional query string parameters you can include in your URL.

11. Set the **Open in a new window** checkbox as you prefer. Select this option to specify that the link target should open in either a new browser tab or a new browser window. Whether a tab or a window is used depends on the innate capability of the browser. When this option is not selected, the link target opens in the current browser window.
12. Click **OK** to close the Component Properties dialog.
13. Click **Save** to save your changes in Oracle Composer (Figure 30–19).

Figure 30–19 Save Button in Oracle Composer



14. Click **Close** to exit Oracle Composer.

30.2.3 Accessing Information About a Wiki Domain

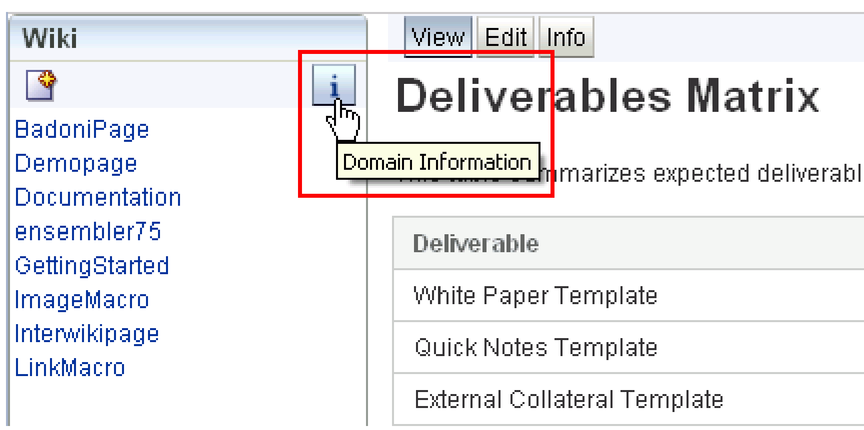
A wiki domain encompasses an identified group of wiki pages. In WebCenter Spaces, domains encapsulate the wiki pages associated with a particular group space.

Every wiki page that exposes left-column navigation provides an entry point to a page that links to or summarizes useful information about the current domain. This section describes how to access that page and summarizes the types of information it provides.

To access information about a wiki domain:

1. Log in, and navigate to a wiki page within the domain you want to learn about.
2. Click the **Domain Information** icon in the navigation panel on the left. (Figure 30–20).

Figure 30–20 Link to the Domain Information Page



Note: For the navigation panel depicted in Figure 30–20 to appear, the URL to the wiki page must include either `inline=0` or `inline=1`. For more information, see Table 30–2, " Query String Parameters in WebCenter Spaces Wiki and Blog URLs".

The **Domain Information** page opens (Figure 30–21).

Figure 30–21 Domain Information Page

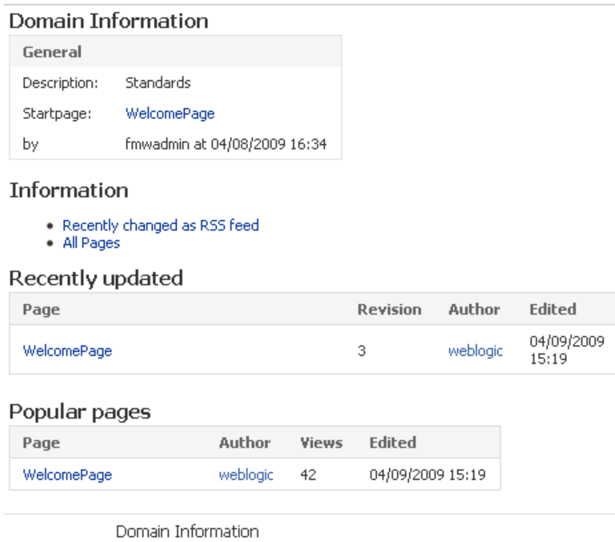


Table 30–4 lists and describes the type of information you can access from the domain information page.

Table 30–4 Categories of Content on the Domain Information Page

Content	Description
General	Provides summary information about the domain, including: ▪ The domain name (displayed in the field labeled **Description**) ▪ A link to the domain's welcome page ▪ The domain's creator and date and time of creation
Information	Provides links to more detailed information about domain content, including: ▪ Recently changed as RSS feed—A link you can use in an RSS reader to track recently changed pages in the current domain. ▪ All Pages—A table that summarizes general information about domain-associated wiki pages. Information includes page name, number of times revised, access mode (editable by all users or only by authenticated users), date last revised, and user who last revised. ▪ Activities—Summarizes activities on domain pages, including the thing acted on (such as *Blogentry*), the action performed (such as *DELETED*), a link to the changed object, the user name of the person performing the action, and the date the action was performed.
Recently Updated	A table that lists the most recently updated domain pages. Includes such information as a link to the updated page, the number of revisions, a link to the user who made the change, and the date and time the change was made.
Popular Pages	A table that lists the most visited domain pages. Includes such information as a link to the page, the user name of the person who created the page, the number of times users have viewed the page, and the date and time a user last viewed the page.

Use a combination of the left-column navigation and your browser's Back button to navigate into and out of these pages.

30.3 Working with Wiki and Blog Content

Oracle WebCenter Wiki and Blog Server provides useful tools for creating and managing wiki and blog content. Easy-access buttons are available for instantly creating new wiki pages and new blog entries. Editing a wiki page is a simple matter of bringing an **Edit** tab forward. Editing a blog entry is as simple as clicking an **Edit** button. To create content, you can use either HTML, through an embedded HTML editor, or standard wiki mark-up.

This section describes how to use content creation and management tools provided through the Oracle WebCenter Wiki and Blog Server. It contains the following subsections:

- Section 30.3.1, "Working with Wiki Pages"
- Section 30.3.2, "Working with Blog Entries"
- Section 30.3.3, "Using Wiki HTML Editor Controls"
- Section 30.3.4, "Using Wiki Mark-Up"

30.3.1 Working with Wiki Pages

Once you have exposed a wiki in your WebCenter application, you can start right in creating wiki pages and providing content. Oracle WebCenter Wiki and Blog Server provides simple controls for creating, editing, and deleting wiki pages.

This section describes how to use them. It contains the following subsections:

- Section 30.3.1.1, "Creating a Wiki Page"
- Section 30.3.1.2, "Editing a Wiki Page"
- Section 30.3.1.3, "Printing a Wiki Page"
- Section 30.3.1.4, "Accessing Information About a Wiki Page"
- Section 30.3.1.5, "Deleting a Wiki Page"
- Section 30.3.1.6, "Restoring an Older Version of a Wiki Page"

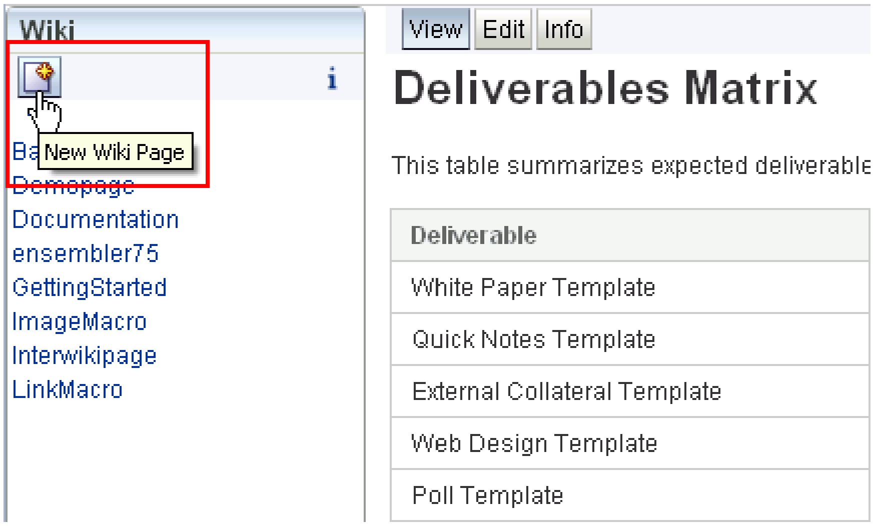
30.3.1.1 Creating a Wiki Page

When you first expose a wiki on a group space page, a wiki domain associated with that group space is also created automatically. Once the domain is created, you can begin adding pages within it. This section tells you how.

To create new pages within a group space wiki:

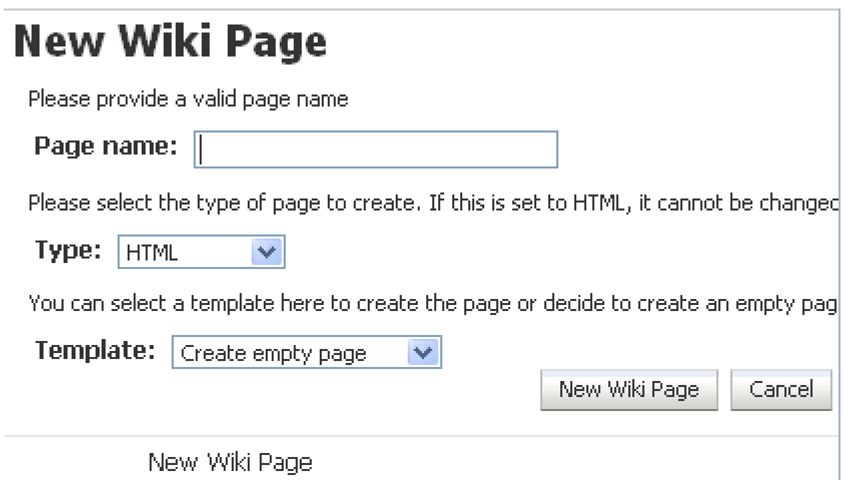
1. In your WebCenter Spaces application, navigate to the wiki where you want to add a page.
2. Click the **New Wiki Page** icon on the wiki page (Figure 30–22).

Figure 30–22 New Wiki Page Icon



3. In the resulting **New Wiki Page** page (Figure 30–23), in the **Page name** field, enter a page name, for example, `MyWikiPage`.

Figure 30–23 New Wiki Page Screen



Follow the wiki page naming convention.

Note: If you include spaces in your wiki page title, then spaces are automatically removed from the page title when you save the page. For example, `My Wiki Page` is renamed to `MyWikiPage`.

If Oracle Secure Enterprise Search (Oracle SES) crawler search support is enabled for your Oracle WebCenter Wiki and Blog Server, the crawler search does not return partial text matches unless you use the wildcard character asterisk (`*`). You can place the wildcard character in the middle or end of a term for wildcard matching. For example, if you search for keywords like `my` or `wiki`, Oracle SES does not return the wiki page `MyWikiPage` in search results. If you search for keywords like `my*` or `*wiki*`, search results return the wiki page `MyWikiPage`.

For information about Oracle SES search, see the "Understanding Crawling and Searching" chapter in the Oracle Secure Enterprise Search Administrator's Guide available here on OTN:

`http://download.oracle.com/docs/cd/E10502_01/doc/search.1018/e10418/toc.htm`

For more information about the wiki page naming convention, see Section 30.3.4, "Using Wiki Mark-Up."

---

4. From the **Type** list, select the format to use in developing page content.

Choose from:

- **HTML**—Select to add styles, tables, links, and images using a simple HTML editor. For information about HTML Editor Controls, see Section 30.3.3, "Using Wiki HTML Editor Controls."
- **Wiki markup**—Select to add styles, tables, links, and images using wiki mark-up. For information, see Section 30.3.4, "Using Wiki Mark-Up."

Note: HTML and wiki mark-up are almost mutually exclusive. You cannot use wiki mark-up in the simple HTML editor; you can use only a limited set of HTML tags in wiki mark-up. For more information, see Section 30.3.4, "Using Wiki Mark-Up."

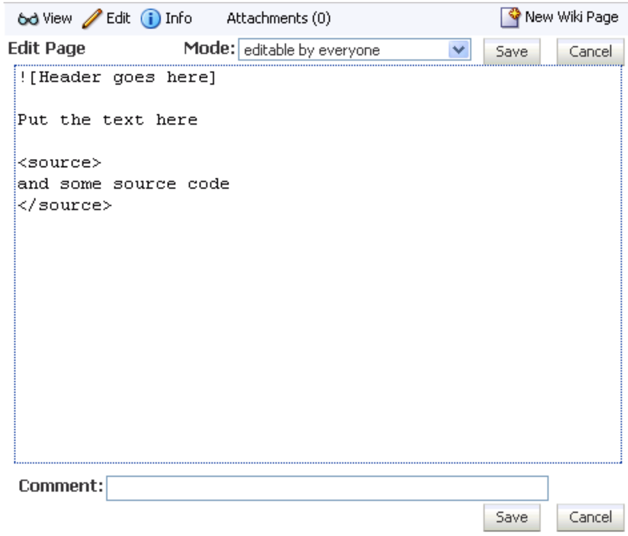
---

5. Optionally, select a template.

Choose from:

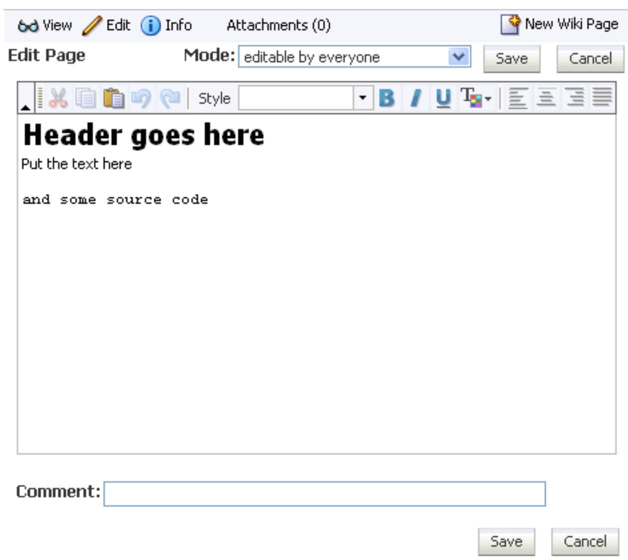
- **Create empty page**—Creates a blank page.
- **SimpleWikiMarkupPage**—Creates a page with a few starter wiki mark-up elements (Figure 30–24).

Figure 30–24 SimpleWikiMarkupPage Template



- **SimpleHTMLPage—**Creates a page with a few starter HTML tags (Figure 30–25).

Figure 30–25 SimpleHTMLPage Template



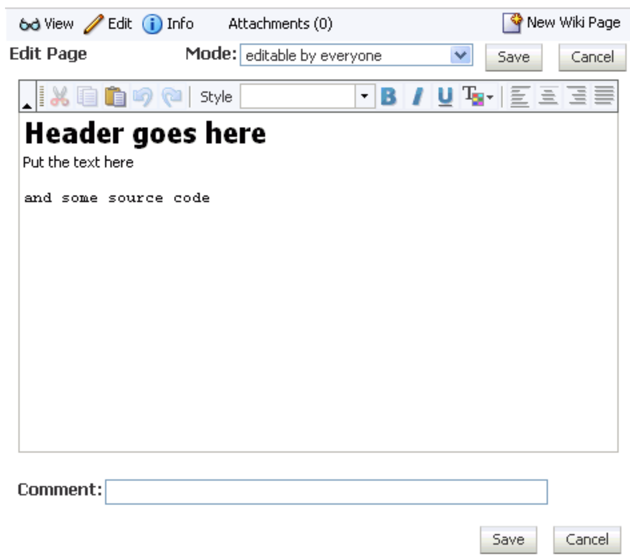
Always select the template for the page type you selected in the **Type** field. That is, for the HTML type, select either **Create empty page** or **SimpleHTMLPage**; for the Wiki markup type, select either **Create empty page** or **SimpleWikiMarkupPage**.

Note: In WebCenter Spaces, in screen reader mode with JAWS launched, it is not possible use the rich text editor to edit a wiki page that is of type `HTML`. It is possible to edit wiki pages of the type `wiki markup`. Therefore, to work around this limitation, in the **Type** field, select **Wiki markup** (instead of **HTML**) when creating wiki pages to enable the pages to be subsequently edited in screen reader mode with JAWS enabled.

Note that a WebCenter Spaces administrator can disable the rich text editor. In such a case, the rich text editor gets disabled for all users.

6. Click the **New Wiki Page** button.
7. In the resulting Edit page screen (Figure 30–26), select a page access mode from the **Mode** list.

Figure 30–26 New Wiki Page



Choose from:

- **editable by everyone**—Select to enable all users with access to the wiki to edit the page.
- **restricted to logged in users**—Select to restrict editorial access to logged in users.
- **only admins are allowed to edit**—Select to restrict editorial access to wiki administrators. This selection appears when the current user is a wiki administrator.
- **restricted to members of the domain**—Select to restrict editorial access to members of the current domain, if domain members are defined. (In WebCenter integrations, users do not typically specify domain members, so this option does not appear most of the time.)

8. Enter content using HTML or wiki mark-up, depending on the option you select for the **Type** field.

For information about HTML editor controls, see Section 30.3.3, "Using Wiki HTML Editor Controls." For information about wiki mark-up, see Section 30.3.4, "Using Wiki Mark-Up."

9. Click **Save** when you have finished.

   This saves your changes and closes the editor.

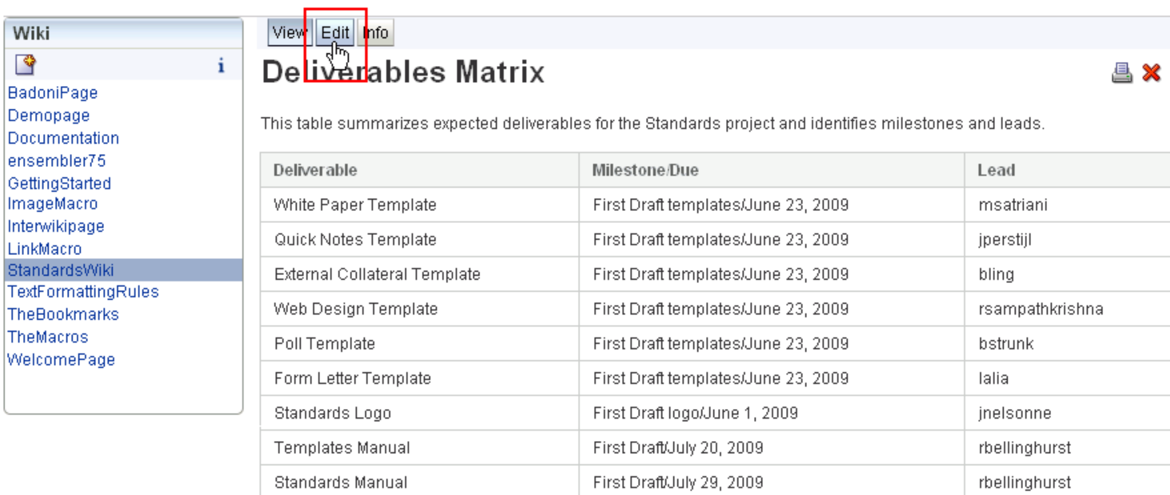
30.3.1.2 Editing a Wiki Page

To enter edit mode on a wiki page:

1. Log in, and navigate to the wiki page you want to edit.
2. Click the **Edit** tab (Figure 30–27).

   The wiki page opens in a simple HTML editor or in a plain text editor, depending on the options selected when the page was created.

Figure 30–27 Edit Tab on a Wiki Page



3. Edit the page, and then click **Save** when you have finished.

For information about HTML editor controls, see Section 30.3.3, "Using Wiki HTML Editor Controls." For information about wiki mark-up, see Section 30.3.4, "Using Wiki Mark-Up."

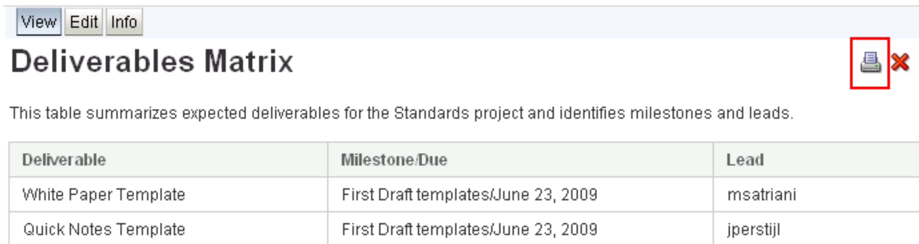
Note: In WebCenter Spaces, in screen reader mode with JAWS launched, it is not possible use the rich text editor to edit a wiki page that is of type `HTML`. It is possible to edit wiki pages of the type `wiki markup`. To work around this limitation, in the **Type** field, select **Wiki markup** (instead of **HTML**) when creating wiki pages to enable the pages to be subsequently edited in screen reader mode with JAWS enabled.

Note that a WebCenter Spaces administrator can disable the rich text editor. In such a case, the rich text editor gets disabled for all users.

30.3.1.3 Printing a Wiki Page

To print a wiki page, click the **Print** icon that displays toward the top of the page (Figure 30–28), and then follow the resulting screen directions from your printer driver.

Figure 30–28 Print Icon on a Wiki Page



30.3.1.4 Accessing Information About a Wiki Page

In addition to domain information (for information, see Section 30.2.3, "Accessing Information About a Wiki Domain"), you can obtain information about a specific wiki page.

To access information about a wiki page:

1. Go to the wiki page of interest.
2. Click the wiki page's **Info** tab.

   The **Page information** page opens (Figure 30–29).

Figure 30–29 A Wiki Information Page

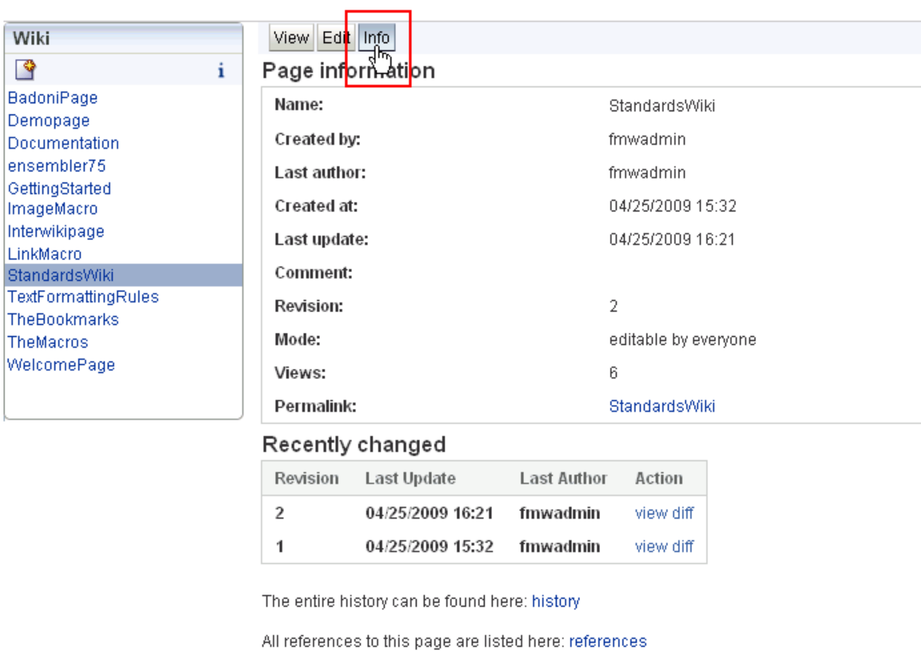


Table 30–5 lists and describes the types of information that appear on a wiki information page.

Table 30–5 Information Types on a Wiki's Page Information Page

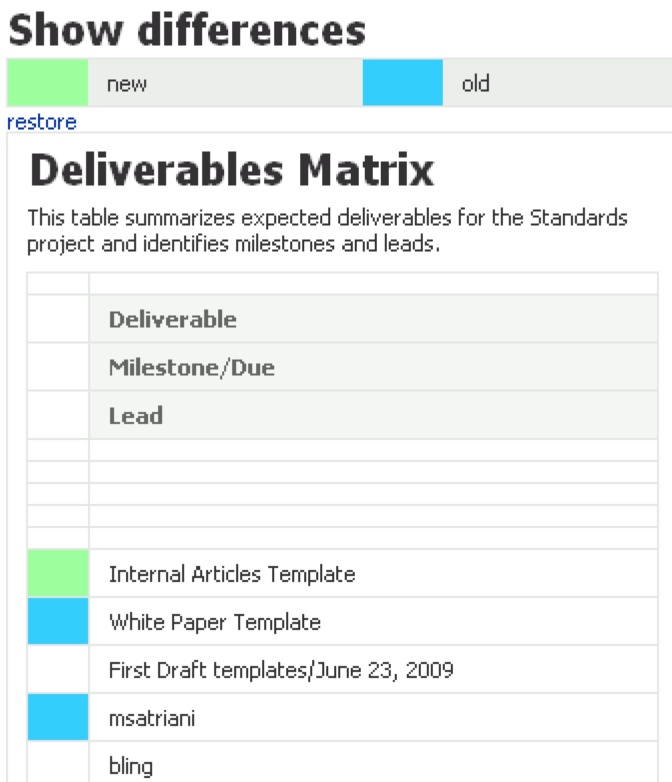
Label	Description
Name	The display name of the current wiki page
Created by	The user name of the person who created the current wiki page
Last author	The user name of the last person to revise the current wiki page
Created at	The date and time the current wiki page was created
Last update	The date and time the current wiki page was last revised
Comment	The comment associated with the current wiki page
Revision	The number of times the current wiki page has been revised
Mode	The editorial access rule that applies to the current wiki page
Views	The number of times the current wiki page has been accessed
Permalink	A reusable link to the current wiki page (for information, see Section 30.2.2, "Creating a Link to a Wiki or Blog in a WebCenter Spaces Application")

Table 30–5 (Cont.) Information Types on a Wiki's Page Information Page

<table>
<tr><th>Label</th><th>Description</th></tr>
<tr><td>Recently changed</td><td>A summary table of the most recent changes to the wiki page

Use the view link to open an earlier version of the current wiki page.

Use the diff link to compare an older version of the wiki page with the current version. Differences are highlighted in colors showing new content and old (see the following graphic).

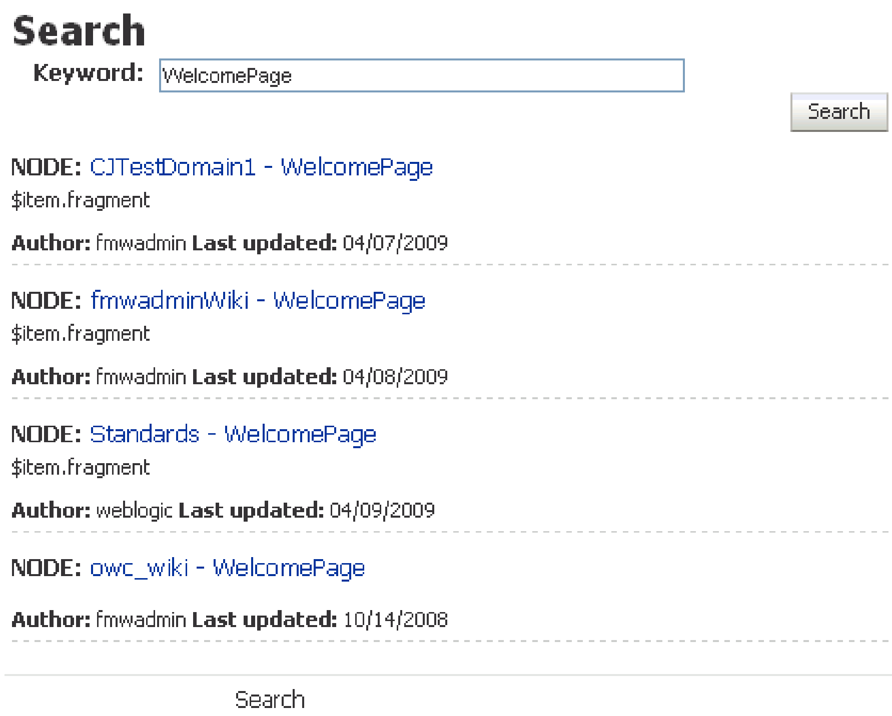


On the Show differences page, you can use the restore link to make an earlier version the current version. For more information, see Section 30.3.1.6, "Restoring an Older Version of a Wiki Page."</td></tr>
<tr><td>history</td><td>A link to a full list of all revisions made to the current wiki page</td></tr>
</table>

Table 30–5 (Cont.) Information Types on a Wiki's Page Information Page

<table>
<tr><th>Label</th><th>Description</th></tr>
<tr><td>references</td><td>A link to a page listing all other wiki pages that link to this wiki page

The reference page additionally provides a query feature that enables you to discover links to other pages in this domain. Enter a wiki page name in the search field, and click Search to view a list of wiki pages on which the specified wiki page is referenced (see the following graphic).


</td></tr>
</table>

30.3.1.5 Deleting a Wiki Page

When you delete a wiki page from your WebCenter application, you are actually deleting it from the Oracle WebCenter Wiki and Blog Server. That is, you are deleting wiki content rather than a WebCenter application page.

You cannot delete the Welcome page that marks the exposure of your wiki content within your application. However, you can easily delete every other wiki page you create or are permitted to delete.

> **Note:** The **Delete** icon is available only to a wiki page author and wiki administrators. Only these users can delete a wiki page.

To delete a wiki page:

1. Navigate to the wiki page you want to delete.
2. Click the **Delete** icon at the top-right corner of the wiki page (Figure 30–30).

Figure 30–30 Delete Icon on a Wiki Page

3. In the confirmation dialog, click **OK**.

   The wiki page is deleted immediately, and its display name is removed from the wiki's left-column navigation. If you delete the existing page you are on, then after the page has been deleted, the welcome page of your current domain displays.

30.3.1.6 Restoring an Older Version of a Wiki Page

To make an older version of a wiki page the current version:

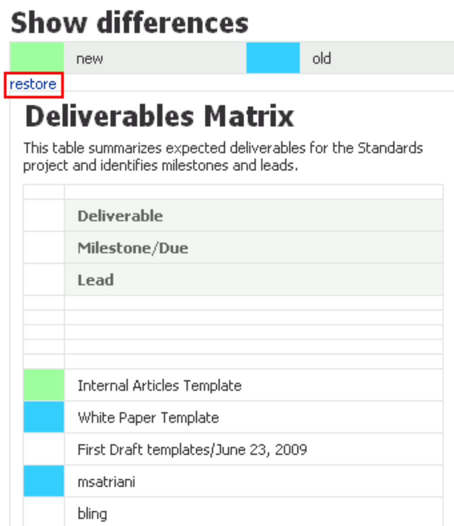
1. Go to the wiki page of interest.
2. Click the **Info** tab.
3. Under **Recently changed**, click the **diff** link next to the version you want to make the current version (Figure 30–31).

Figure 30–31 Diff Link Next to a Wiki Page Version

   If the version of interest is not listed under **Recently changed**, click the **history** link instead, and then, on the resulting page, click the **diff** link next to the version of interest.

4. On the **Show Differences** page, click the **restore** link on the top-left corner of the page (Figure 30–32).

Figure 30–32 Restore Link on a Show Differences Page



The older version is restored as the current version. The previously current version becomes an older version.

30.3.2 Working with Blog Entries

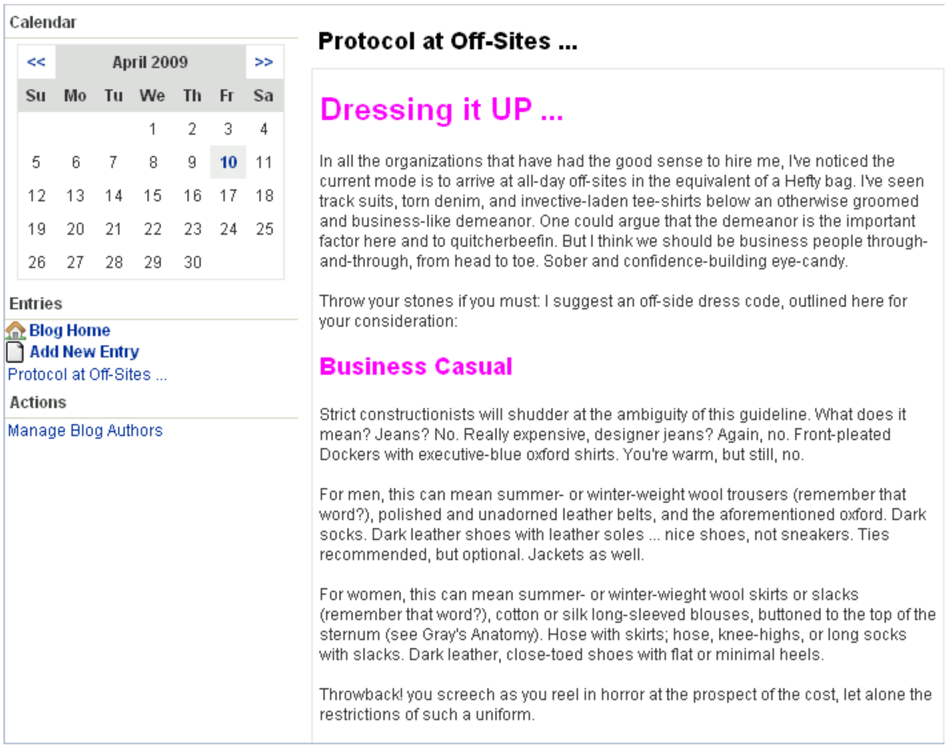
This section describes how to create, edit, delete, and add comments to a blog entry. It contains the following subsections:

- Section 30.3.2.1, "What You Should Know About Blog Entries"
- Section 30.3.2.2, "Creating a Blog Entry"
- Section 30.3.2.3, "Editing a Blog Entry"
- Section 30.3.2.4, "Adding a Blog Comment"
- Section 30.3.2.5, "Deleting a Blog Comment"
- Section 30.3.2.6, "Viewing Information About a Blog"
- Section 30.3.2.7, "Deleting a Blog Entry"

30.3.2.1 What You Should Know About Blog Entries

Blog entries for a given day render in a continuous column on a single page (Figure 30–33).

Figure 30–33 A Blog Entry

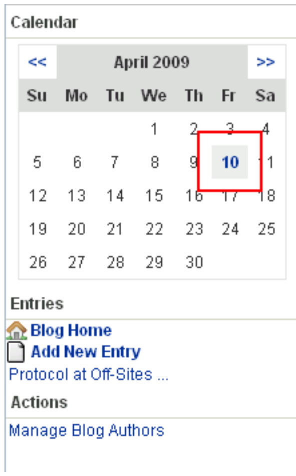


Each entry occupies its own region within the column and each region comes equipped with controls for revising, commenting on, and deleting the entry. Newer entries are added to the top of the blog.

Links under the **Entries** heading on the navigation panel on left provide controls for navigating to the blog's first entry (**Blog Home**) and creating a new blog entry (**Add New Entry**). Additionally, as entries are added, their headings automatically appear on this list of links.

Blog pages are automatically organized according to month of entry. Users can access the various monthly entries using the calendar that appears to the left of the blog content. The dates with associated entries are linked to those entries. You can click a date in the calendar to go to the entries for a particular day (Figure 30–34).

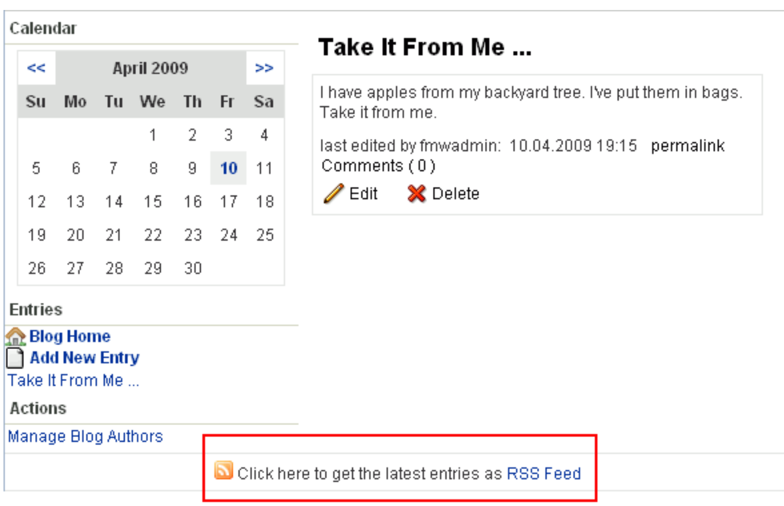
Figure 30–34 A Blog Calendar with an Entry on the Tenth



Use the arrows to the left and right of the month to navigate to previous and later months.

A link for grabbing a blog news feed (**RSS Feed**) appears below the content area (Figure 30–35).

Figure 30–35 The RSS Feed Link on a Blog Page



Note: For information about news feeds in WebCenter Spaces applications, see Chapter 26, "Working with the RSS Service."

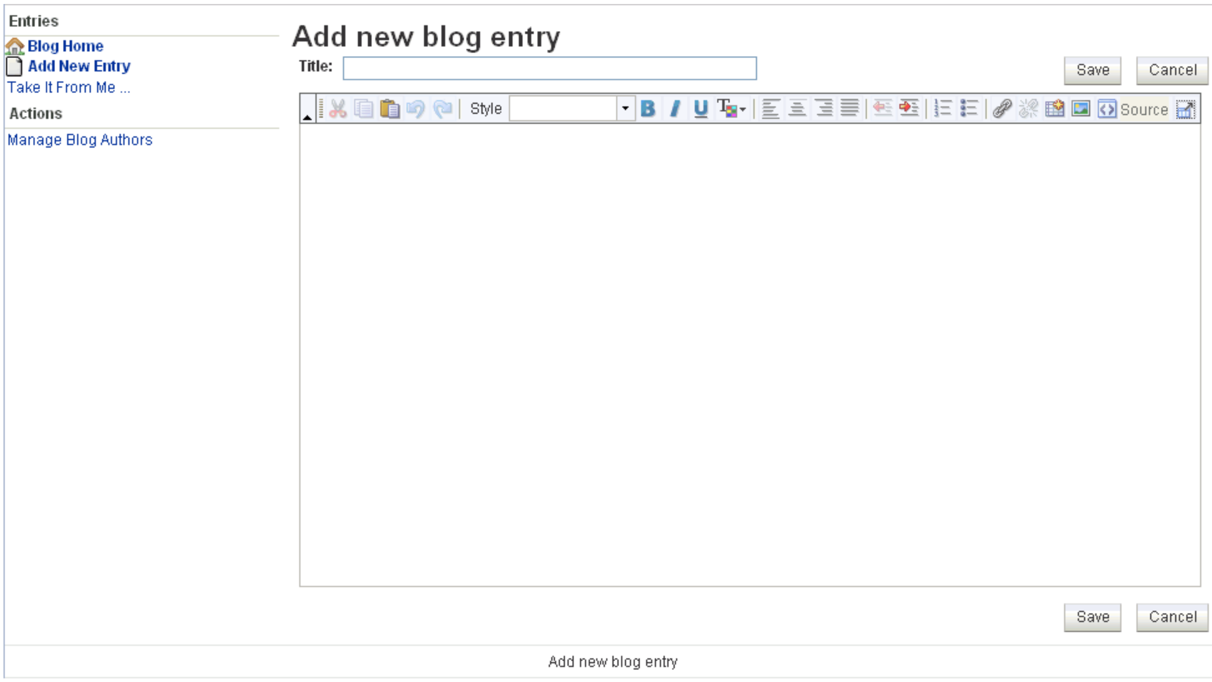
30.3.2.2 Creating a Blog Entry

By default, users do not have permission to create blog entries in a blog exposed in a WebCenter Spaces application. Users can add blog entries only if the permission to allow all users to create blog entries is set up on Oracle WebCenter Wiki and Blog Server. Specifically, the `BlogAdmin` permission must be granted to the `USER` role. For more information, see the "Managing Users and Roles" section in the *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter*.

To create a blog entry:

1. Navigate to the blog where you want to create an entry.
2. Under **Entries** on the navigation panel on the left, click the **Add New Entry** link.
3. In the resulting **Add new blog entry** page (Figure 30–36), in the **Title** field, enter a display name for the blog entry.

Figure 30–36 Add New Blog Entry Page



4. In the text area, enter blog content.

   The text area provides a simple HTML editor for adding style elements and HTML to your content. For information about illustrations and descriptions of HTML editor controls, see Section 30.3.3, "Using Wiki HTML Editor Controls."
5. Click **Save** to save your changes and exit the editor.

   The blog title displays as a link in the navigation panel on the left and as the main heading over the text area (Figure 30–37).

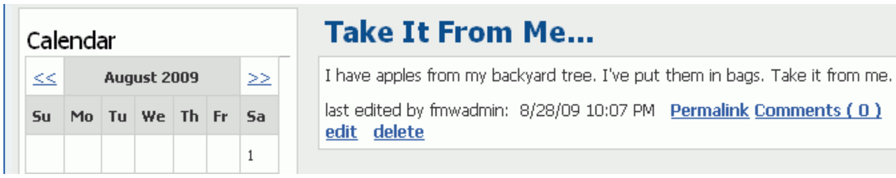
Figure 30–37 A Blog Title

30.3.2.3 Editing a Blog Entry

To edit a blog entry:

1. Navigate to the blog where you want to edit an entry.
2. Click the **edit** link below the entry (Figure 30–38).

Figure 30–38 Edit Link on a Blog Entry



3. Edit the blog content using the HTML editor controls as described in Section 30.3.3, "Using Wiki HTML Editor Controls."
4. Click the **Save** button above or below the editor to save your changes and exit the editor.

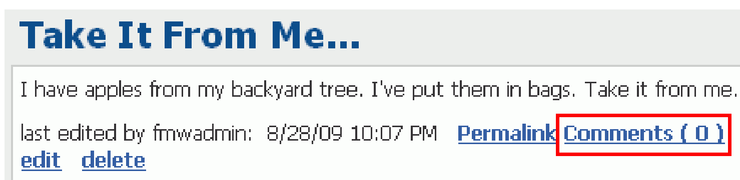
30.3.2.4 Adding a Blog Comment

A great feature of blogs is the facility to respond to blog entries. This section describes how.

To comment on a blog entry:

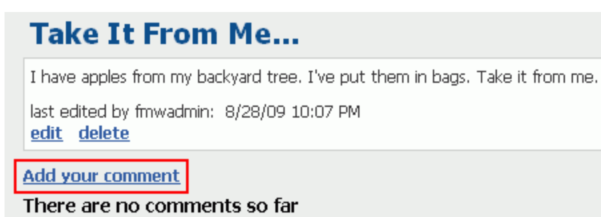
1. Navigate to the blog where you want to comment on an entry.
2. Click the **Comments** link (Figure 30–39).

Figure 30–39 Comments Link on a Blog Entry



3. Click the **Add your comment** link below the entry (Figure 30–40).

Figure 30–40 Link for Adding Comments on a Blog Entry



4. In the **Text** field, enter your comment.

   Enter comments in plain text, or, if you prefer, use wiki mark-up. For information about wiki mark-up, see Section 30.3.4, "Using Wiki Mark-Up."
5. Click **Save** to save your changes and exit the editor.

30.3.2.5 Deleting a Blog Comment

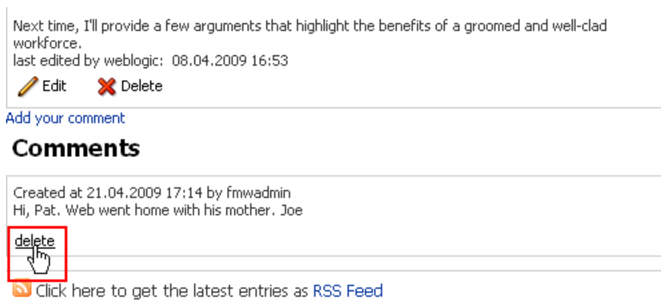
Users identified as blog authors (for information, see Section 30.3.2.8, "Adding and Removing Additional Blog Authors") are authorized to delete blog comments. This section describes how.

Note: A blog comment is a comment on a blog entry. For information about deleting a blog entry, see Section 30.3.2.7, "Deleting a Blog Entry."

To delete a blog comment:

1. Navigate to the blog where you want to delete a blog comment.
2. If necessary, click the **Comments** link to show blog comments.
3. Click the **delete** link below the comment you want to remove (Figure 30–41).

Figure 30–41 Delete Link Below a Blog Comment



Note: You must be a designated blog author to delete a blog comment. If you are not a designated blog author, the **delete** link does not show.

For information about adding or removing a blog author, see Section 30.3.2.8, "Adding and Removing Additional Blog Authors."

30.3.2.6 Viewing Information About a Blog

Blog information is available in the blog administrator view (`inline=0` mode). This view provides a **General** heading over a series of links that lead to useful and interesting information (Figure 30–42).

Figure 30–42 Blog Rendered in Inline=0 Mode

Table 30–6 lists and describes the types of information you can access using the links that appear under the **General** heading.

Table 30–6 Information Under a Blog's General Heading

Link	Description
Activities	Links to a page that lists recent activities related to wiki pages and blog entries The **Latest activities** page summarizes activities on domain pages, including the thing acted on (such as *Blogentry*), the action performed (such as *DELETED*), a link to the changed object, the user name of the person performing the action, and the date and time the action was performed. The page lists the following activities: ■ Wiki pages added, updated, or deleted ■ Blog entries added, updated, or deleted ■ Blog comments added or deleted
All Pages	Links to a page that lists and links to all accessible wiki pages The **All Pages** page links to all pages in the current domain, provides the number of times a page has been revised, specifies the editorial mode that applies to a page, and lists the date and time the page was last revised and the user name of the person who revised it.

Table 30–6 (Cont.) Information Under a Blog's General Heading

Link	Description
All Blogs	Links to a page that lists and links to all accessible blogs The **All Blogs** page provides an RSS icon for each blog, which you can use to obtain an RSS feed for use in your favorite news feed reader; a link to the blog; a description of the blog type, either `DOMAIN` (a group blog) or `USER` (a personal blog); the user ID of the blog owner (personal blogs only), and a link to the author's profile (personal blogs only).
Recently Changed	Links to a page that lists and links to recently changed wiki pages The **Recently Changed** pages page provides a link to the changed wiki page, specifies the number of times the page has been revised, provides a link to the profile of the user who made the revision, and shows the date and time of the revision.
Popular Pages	Links to a page that lists and links to frequently viewed wiki pages Additionally, the **Popular Pages** page lists the wiki page author, specifies the number of times users have viewed the page, and records the date and time a user last edited the page.

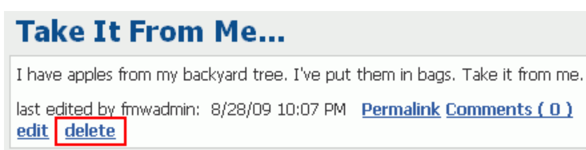
30.3.2.7 Deleting a Blog Entry

Once you click the **Delete** link under a blog entry, the entry is deleted. There is no confirmation dialog second-guessing your decision. This increases the efficiency of deleting, but also the risk. Be sure you want to permanently remove a blog entry before you click the **Delete** link.

To delete a blog entry:

1. Navigate to the blog where you want to delete an entry.
2. Click the **Delete** link below the entry (Figure 30–38).

Figure 30–43 Delete Link on a Blog Entry



The selected entry is deleted from the blog.

30.3.2.8 Adding and Removing Additional Blog Authors

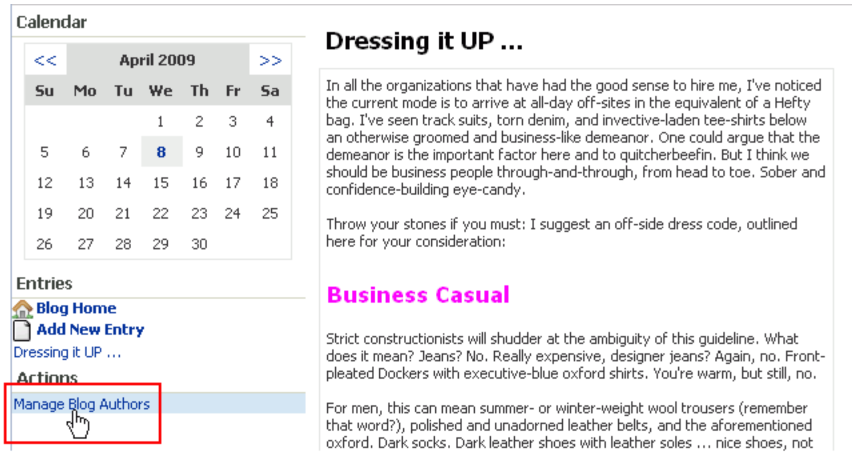
By default, blog entries can be added only by the person who owns the blog. In a personal space, that is the person who owns the personal space. In a domain (such as a blog associated with a group space), that is the wiki administrator.

The **Manage Blog Authors** link, which displays in a blog's left-column navigation, enables you to specify additional users who can add blog entries. Removing additional blog authors is as easy as clicking a link.

To enable or disable additional blog authors:

1. Navigate to the blog you want to open or close to other users' entries.
2. Click the **Manage Blog Authors** link (Figure 30–44).

Figure 30–44 The Manage Blog Authors Link

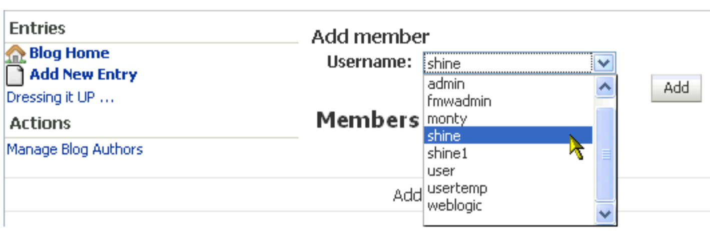


3. The next step depends on whether you want to add or remove a blog author:

   - To add a blog author:

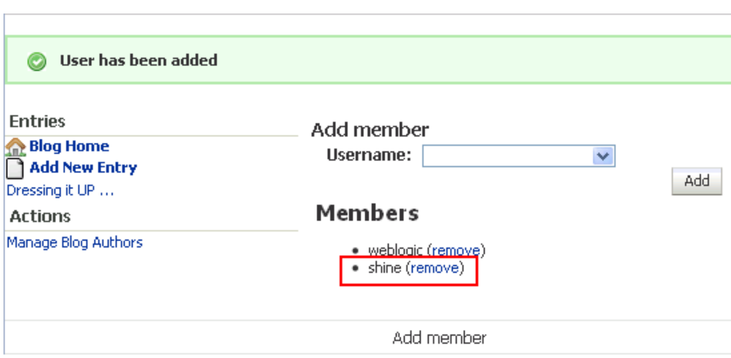
     From the **Username** list, select the user name of the person whom you want to be able to add blog entries, and then click the **Add** button (Figure 30–45).

Figure 30–45 Adding a Blog Author



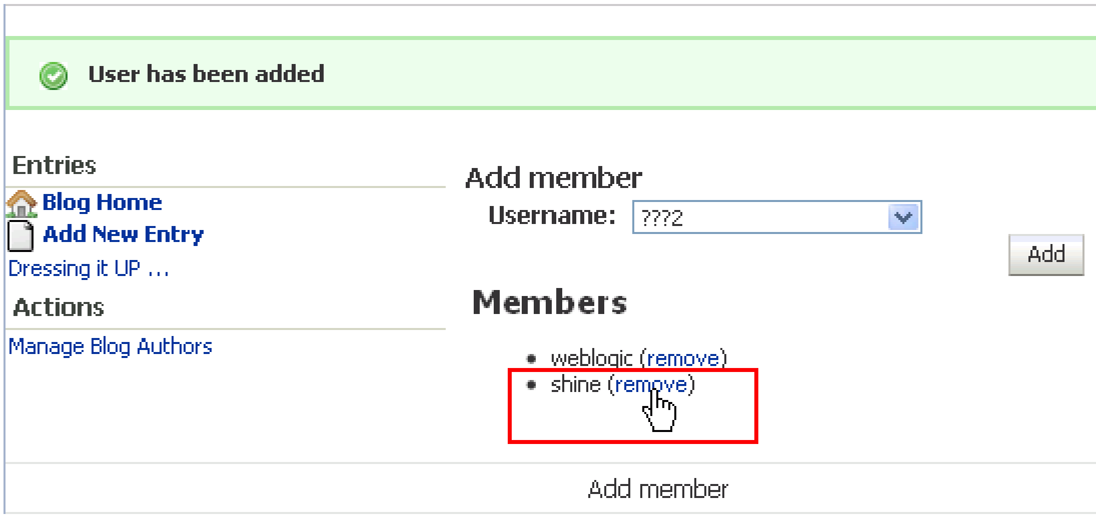
The selected user appears on the **Members** list (Figure 30–46).

Figure 30–46 Newly Added Blog Author in the Members List



   - To remove a blog author, under the **Members** heading, click the **remove** link next to the author's user name (Figure 30–47).

Figure 30–47 Remove Link Next to a User Name



30.3.3 Using Wiki HTML Editor Controls

Oracle WebCenter Wiki and Blog Server supports the use of HTML or wiki mark-up language to format page content. When you create or edit a wiki page, you can use either wiki mark-up language or HTML, depending on the page type specified when the page was created. Table 30–7 illustrates and describes controls available in the HTML editor provided with wikis and blogs.

Note: For information about wiki mark-up, see Section 30.3.4, "Using Wiki Mark-Up."

Table 30–7 HTML Editor Controls

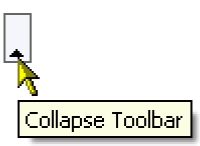
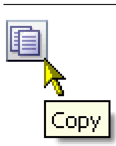
Icon	Description
	Toolbar toggle switch. Click to hide the HTML editor toolbar. Click again to restore the toolbar to view.
	Cut icon. Select content, and click to remove your selection from its current location and add it to a clipboard. Alternatively, select text and press Ctrl+X.
	Copy icon. Select content, and click to copy your selection to a clipboard. Alternatively, select text and press Ctrl+C.

Table 30–7 (Cont.) HTML Editor Controls

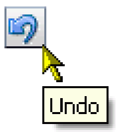
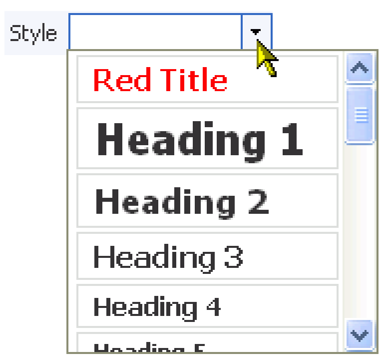
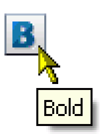
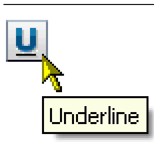
Icon	Description
	Paste icon. Place your cursor where you want cut or copied content to appear, and click to paste clipboard content. Alternatively, press Ctrl+V.
	Undo icon. Click to back out of the latest change. Alternatively, press Ctrl+Z.
	Redo icon. Click to restore the latest change. Alternatively, press Ctrl+Y.
	Style dropdown list. Expand to select a style for currently selected text. Or select a style and enter text in the selected style.
	**Bold** icon. Select text, and click the **Bold** icon to make the text bold. Or click the **Bold** icon and enter text in bold. Click the icon again to exit bold mode.
	*Italic* icon. Select text, and click the Italic icon to make the text italic. Or click the Italic icon and enter text. Click the icon again to exit italic mode.
	Underline icon. Select text, and click the Underline icon to draw an underline below text. Or click the Underline icon and enter text. Click the icon again to exit underline mode.

Table 30–7 (Cont.) HTML Editor Controls

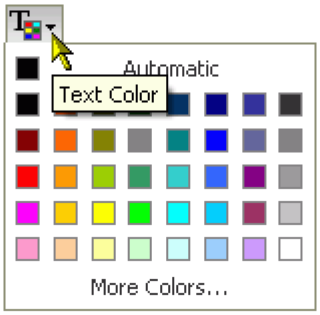
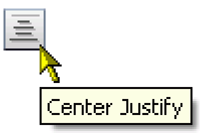
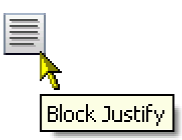
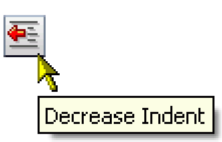
Icon	Description
	Text Color list. Select text, and then select a color from this list to make the text the selected color. Or select a color and enter text. Select a second color or Automatic to apply a new color or the default (Automatic equals black).
	Left Justify icon. Select content, and click the Left Justify icon to align your selection left. Or click the icon and enter content.
	Center Justify icon. Select content, and click the Center Justify icon to center your selection. Or click the icon and enter content.
	Right Justify icon. Select content, and click the Right Justify icon to align your selection right. Or click the icon and enter content.
	Block Justify icon. Select content, and click the Block Justify icon to make your selection align on both the left and right sides. Or click the icon and enter content.
	Decrease Indent icon. Select content, and click the Decrease Indent icon to remove one level of indent.

Table 30–7 (Cont.) HTML Editor Controls

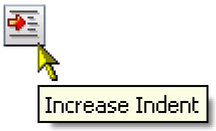
Icon	Description
	Increase Indent icon. Select content, and click the Increase Indent icon to add one level of indent. Or click the icon and enter indented content.
	Insert/Remove Numbered List icon. On a new, blank line, click to start a numbered list. Or select a line of text and click to convert it to a numbered list. Selecting a numbered item and clicking the icon removes numbered list formatting. Click again to exit Numbered List mode.
	Insert/Remove Bulleted List icon. On a new, blank line, click to start a bulleted list. Or select a line of text and click to convert it to a bulleted item. Selecting a bulleted item and clicking the icon removes bulleted list formatting. Click again to exit Bulleted List mode.

Table 30–7 (Cont.) HTML Editor Controls

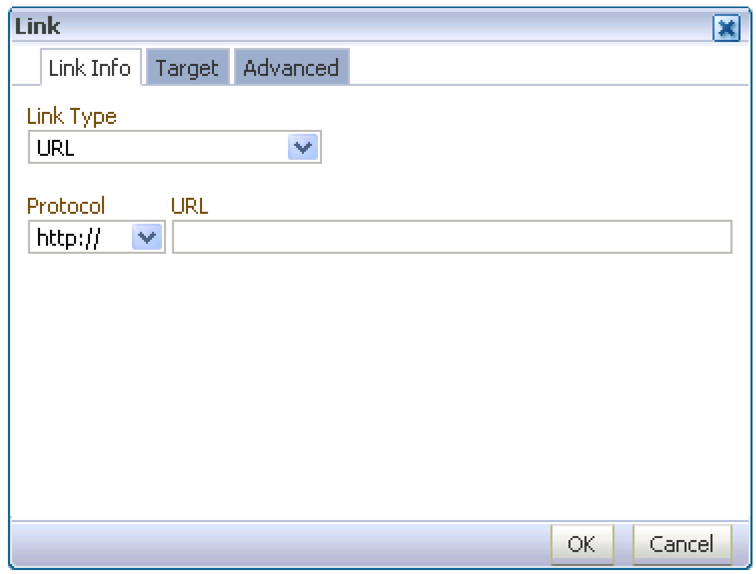
Icon	Description
	Insert/Edit Link icon. Click to open a dialog for entering a new hyperlink. Or select a hyperlink and click to edit. Enter link information on the **Link Info** tab. Refine link information on the **Target** and **Advanced** tabs.  On the **Link Info** tab: For Link Type, select from: ■ URL ■ Link to anchor in the text ■ E-Mail The values that follow depend on your selection: ■ For URL, select the link protocol: http, https, ftp, news, or <other>. For <other> you must enter the protocol manually in the **URL** field. Then enter the rest of the URL in the **URL** field. ■ For Link to anchor in the text, select the anchor from the list provided. ■ For E-Mail, enter an e-mail address, and then, optionally, a message subject and message text in the fields provided. The subject and text information prepopulates the message that is initiated when a user clicks the e-mail link.

Table 30–7 (Cont.) HTML Editor Controls

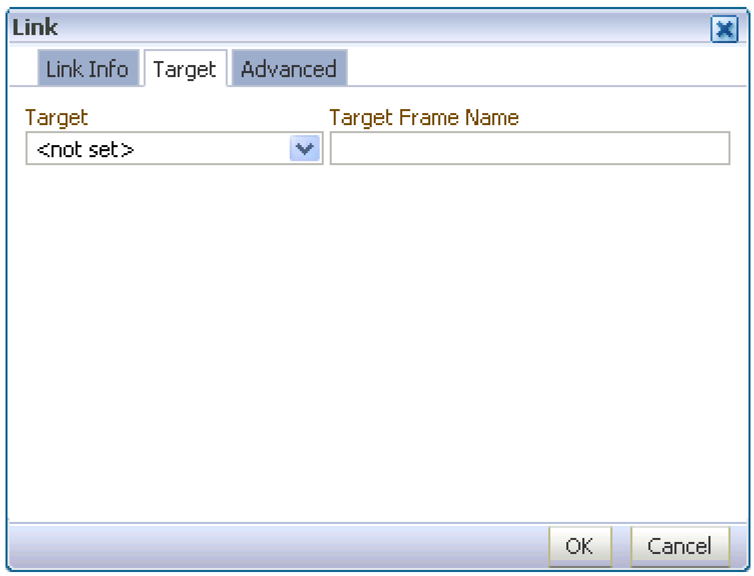
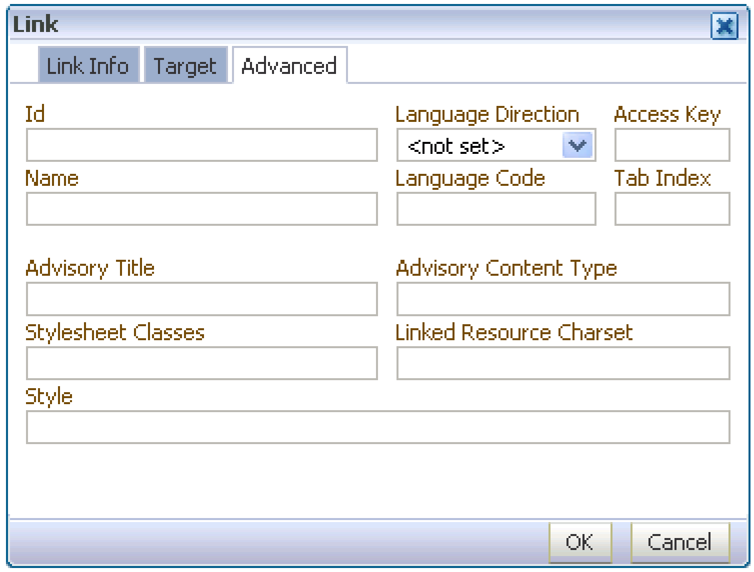
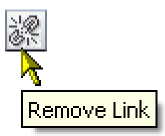
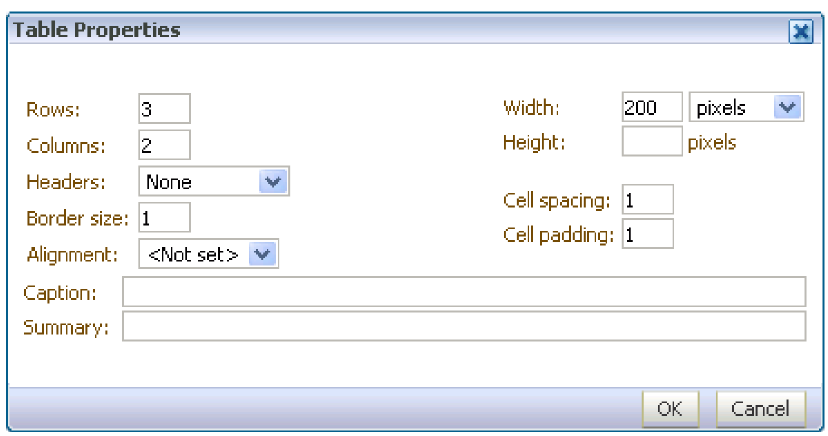
Icon	Description
Insert/Edit Link icon (Continued)	Use the **Target** tab to refine the target link destination.
Target tab	From the **Target** pick list, select from: ■ <not set> ■ <frame> ■ <popup window> ■ New Window (_blank) ■ Topmost Window (_top) ■ Same Window (_self) ■ Parent Window (_parent) In the **Target Frame Name** field, enter the name of the frame you are targeting in your link destination. 

Table 30–7 (Cont.) HTML Editor Controls

<table>
<tr><th>Icon</th><th>Description</th></tr>
<tr><td>Insert/Edit Link icon (Continued)
Advanced tab</td><td>Use the Advanced tab to set advanced properties on your link URL.

</td></tr>
<tr><td>
</td><td>Remove Link icon. Select a link, and click this icon to remove the link. Link text is preserved.</td></tr>
<tr><td>
</td><td>Insert/Edit Table icon. Click to open a Table Properties dialog and create a new table. Or select a table and click the icon to edit the table properties.


Note: The CSS delivered with WebCenter and Oracle WebCenter Wiki and Blog Server use border size, cell spacing, and cell padding all equal to <code>1</code>. Consequently, changing those fields in Table Properties will not have any visual effect. The workaround is to modify the CSS to your own preference.</td></tr>
</table>

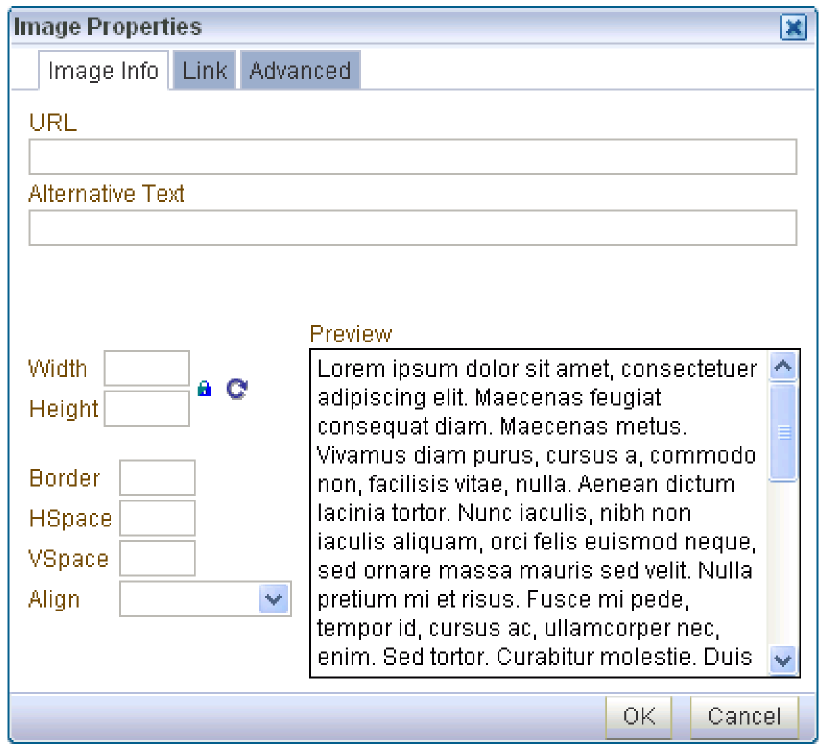
Table 30–7 (Cont.) HTML Editor Controls

<table>
<tr><th>Icon</th><th>Description</th></tr>
<tr><td>

</td><td>

Insert/Edit Image icon. Click to open an Image Properties dialog and provide image-display values. The dialog provides three tabs:

- **Image Info**



</td></tr>
</table>

Table 30–7 (Cont.) HTML Editor Controls

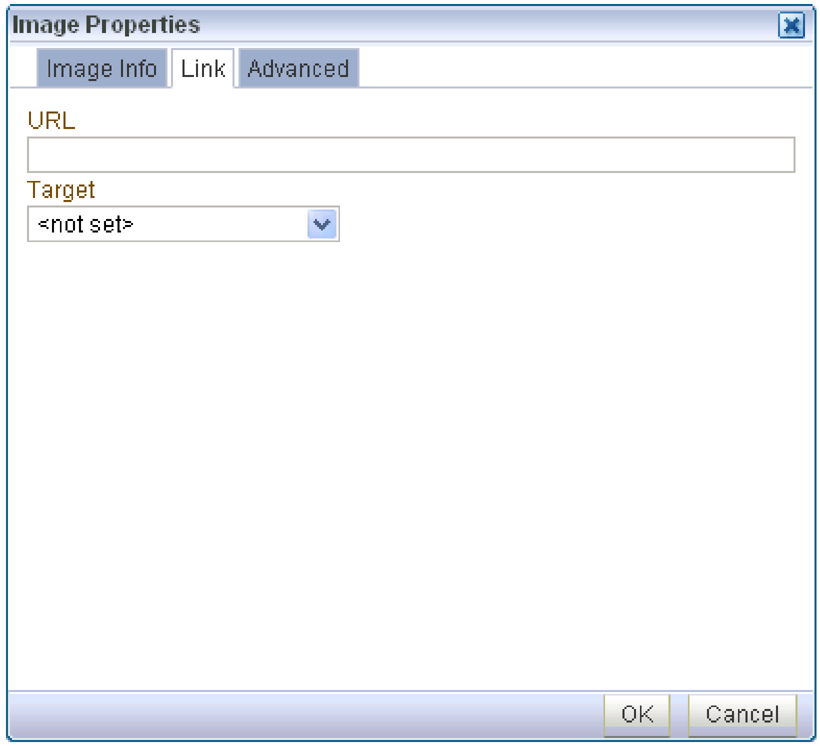
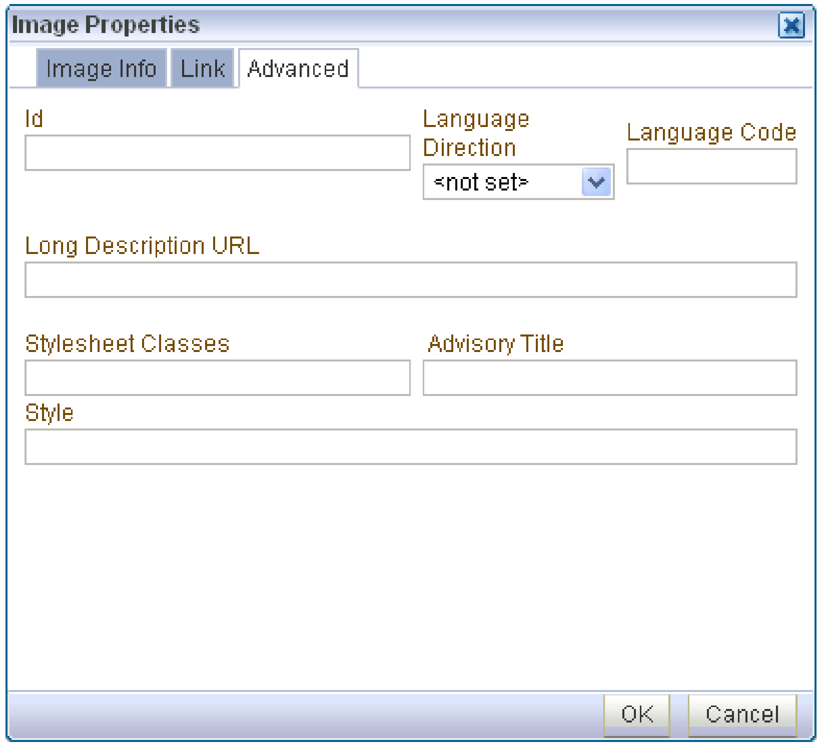
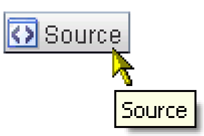
Icon	Description
Insert/Edit Image (cont.)	■ **Link** 

Table 30–7 (Cont.) HTML Editor Controls

Icon	Description
Insert/Edit Image (cont.)	■ **Advanced** 
	Source button. Click to enter or exit Source view, where you can enter your own HTML code.
	Maximize the editor size icon. Click to toggle between maximizing the size of the edit window and restoring the editor to its default size.

30.3.4 Using Wiki Mark-Up

Oracle WebCenter Wiki and Blog Server supports the use of HTML or wiki mark-up language to format page content. When you create or edit a wiki page, you can use either wiki mark-up language or HTML, depending on page type specified when the page was created. Table 30–8 describes some commonly used wiki mark-up rules and examples.

> **Note:** For information about HTML mark-up, see Section 30.3.3, "Using Wiki HTML Editor Controls."

Table 30–8 Commonly Used Wiki Markup

<table>
<tr><th>Formatting Rule</th><th>Description</th><th>Syntax Examples</th></tr>
<tr><td>Headers</td><td>Define headers using exclamation points (!). The number of exclamation points defines the header depth.</td><td>!Header1
!!Header2
!!!!Header4</td></tr>
<tr><td>Emphasis</td><td>Wrap the text you want to emphasize with the following characters:
Bold: *
Italics: #
Underlined: "</td><td>The following is *bold text*.
The following is #italicized text#.
The following is "underlined text".</td></tr>
<tr><td>Links</td><td>Display external links either by entering the link URL:
http://www.oracle.com
Or by using the following format to provide a link display name:
[link display name | URL]
Display links to other wiki pages using the following format:
[link display name | wiki page name]
Note that if the internal page does not exist, wiki creates a new one and displays a question mark (?) next to the page name in the view mode. Click the question mark to edit the page.</td><td>http://www.oracle.com
[oracle | http://www.oracle.com]
[Seattle | SeattleSupportPage]</td></tr>
<tr><td>Wiki Page Names</td><td>Use the camel notation to name your wiki pages. This notation uses an initial upper case letter followed by lowercase letters, then another upper case letter and another series of lowercase letters, for example, MyWikiPage. To use an alternate name for your page, use the following convention:
[alternate name | Wiki page name]</td><td>[My Page | MyPage]</td></tr>
<tr><td>Lists</td><td>At the beginning of a new line, use an asterisk (*) to denote a bulleted list or the number sign (#) to denote a numbered list.</td><td>* bulleted item 1
* bulleted item 2

numbered item 1
numbered item 2</td></tr>
<tr><td>Tables</td><td>Use HTML to create a table. Open and close the table with the <table></table> tags and define columns by using the "|" symbol.</td><td><table width="75%" border="0">
col1 | *col2*
Hello | world
Here | I am
</table></td></tr>
<tr><td>Images</td><td>Any forward slashes in the image URL must go outside the quotation marks.</td><td><img src="" TARGET=_blank
http://www.anyserver.com/image.gif"/></td></tr>
</table>

31

Working with the Worklist Service

The Worklist service provides access to all the worklist items that require your attention. These worklist items are displayed on your application page, where you can view and act on all items in one place. These worklist items may be queried from any of the BPEL servers configured in your application.

This chapter contains the following sections:

- Section 31.1, "What You Should Know About the Worklist Service"
- Section 31.2, "Adding a Worklist Service Task Flow to a Page"
- Section 31.3, "Working with the Worklist Service Task Flow"
- Section 31.4, "Setting Worklist Service Task Flow Properties"

Audience

This chapter is intended for users interested in understanding and using the features of the Worklist service to track their tasks, notifications, and alerts. Much of this information also applies to custom WebCenter applications, though it is written with WebCenter Spaces users in mind. For information about custom WebCenter applications, see "Integrating the Worklist Service" in *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter*.

The WebCenter Spaces application administrator has the authority to expose or hide task flows from a particular service. Tasks discussed in this chapter are not available to you if the relevant service is hidden.

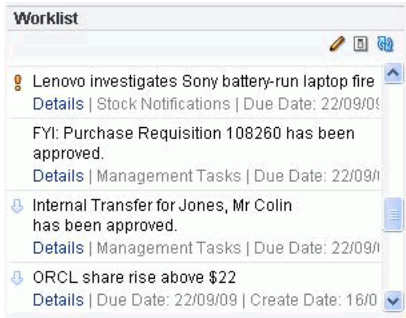
> **Note:** For information about WebCenter Spaces seeded user roles, see "Managing Users and Roles for WebCenter Spaces" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter*.

31.1 What You Should Know About the Worklist Service

The Worklist service provides access to BPEL Worklist items that are a result of a task invoked as part of a BPEL Workflow process, or are a result of a message being sent to the Worklist channel on the Oracle User Messaging Service.

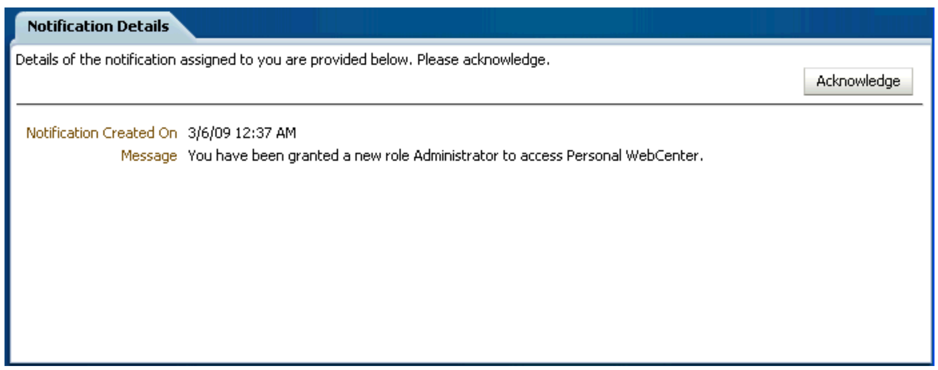
The Worklist task flow (Figure 31–1) is available in both WebCenter Spaces and custom WebCenter applications. In WebCenter Spaces applications, the Worklist task flow can be accessed from the Worklist pane in the Sidebar.

Figure 31–1 Worklist Task Flow



The Worklist task flow provides a fast and easy way to view and respond to messages, alerts, and notifications from the automated processes in place in your organization. You can click an item in the Worklist task flow to view details in a separate window (Figure 31–2).

Figure 31–2 Worklist Notification



For example, in WebCenter Spaces, if you are selected as an approver for group space membership, every time a user applies to become a member of the group space a notification is sent to your Worklist. This is just one example of the types of notifications and requests that can be posted on your Worklist.

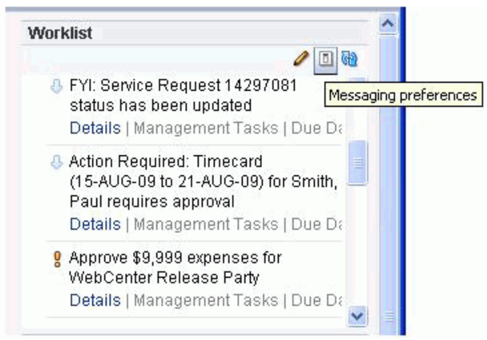
One Worklist item might be a request for group space membership. Response to such a request would be to approve or reject it. Another Worklist item might be a notice of acceptance as a member of a group space. Response to such a notification would be to acknowledge that you have received it. These are two small examples of a much wider range of possible messages, alerts, notifications, and responses.

The Worklist only shows items from the Oracle SOA Suite BPEL Servers. Some Worklist items are kicked off by events that are associated with an externally defined *workflow*. A workflow maps the route an item follows after an event kicks off. For example, a workflow might define the way a project assignment is routed, such as from administrator, to moderator, and then to participant. Additionally, it specifies what happens (if anything) when the assignee responds (such as with an **Acknowledge**). This type of workflow is enabled in a Workflow server that comes with Oracle SOA Suite. The definition of these workflows is an administrative or development task.

The WebCenter Spaces application also has internally-defined workflows. An example of an internally-defined workflow includes the process of subscribing to a WebCenter Spaces group space. A user requests a subscription. The request appears on the group space moderator's Worklist. If the group space has multiple moderators, the first response to the Worklist item is to claim ownership of the request, so that only one moderator responds to the request itself.

Messages, alerts, and notifications might also come from the User Messaging Service. The Worklist task flow includes a control for accessing messaging preferences on this server (Figure 31–3). Clicking the Messaging preferences icon displays 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 31–3 Worklist Messaging Preferences Icon

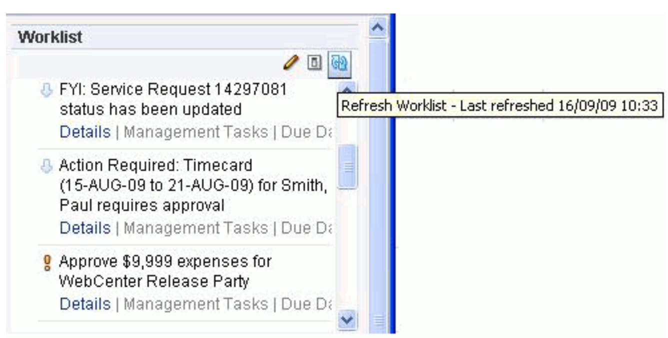


For information about setting messaging preferences for the User Messaging Service through WebCenter Spaces, see Section 31.3.2, "Setting Messaging Preferences."

Every 15 minutes, the Worklist task flow refreshes automatically with new messages, alerts, and notifications. Optionally, you can update your view yourself by clicking the task flow's Refresh Worklist icon (Figure 31–4).

> **Note:** The Worklist task flow does not get refreshed automatically when you perform an action on any task. You must refresh the task flow to list the latest items.

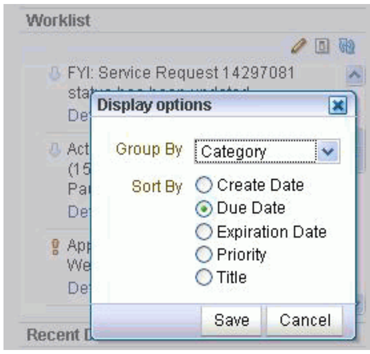
Figure 31–4 The Refresh Worklist Icon



Roll your mouse pointer over the Refresh Worklist icon to display the date and time the task flow was last refreshed.

To assist you in maintaining an organized view of your Worklist items, the Worklist task flow provides a variety of display options, accessible from the Worklist toolbar (Figure 31–5).

Figure 31–5 Worklist Display Options



Worklist display options enable you to approach responding to messages, alerts, and notifications according to timeliness and relevance.

For more information about Worklist display options, see Section 31.3.3, "Arranging Your Display of Worklist Items."

31.2 Adding a Worklist Service Task Flow to a Page

For the steps to add a Worklist service task flow to a page, see Section 10.1.4, "Adding Task Flows to a Page."

Note: You can add worklist task flows in group spaces only.

31.3 Working with the Worklist Service Task Flow

The Worklist task flow provides a fast and easy way to read and respond to items 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 the Worklist task flow and describes how to use it. The information in this section applies equally to the features available in the task flow and in the Sidebar pane.

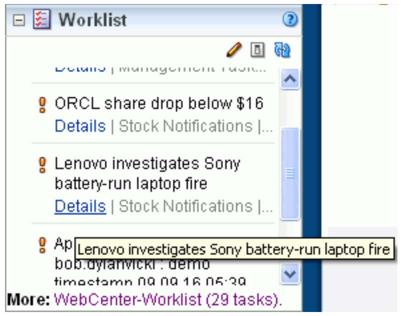
This section includes the following subsections:

- Section 31.3.1, "Viewing and Responding to Worklist Items"
- Section 31.3.2, "Setting Messaging Preferences"
- Section 31.3.3, "Arranging Your Display of Worklist Items"

31.3.1 Viewing and Responding to Worklist Items

To view a task, message, alert, or notification, simply click the **Details** link. (Figure 31–6).

Figure 31–6 Selecting a Worklist Item for Viewing

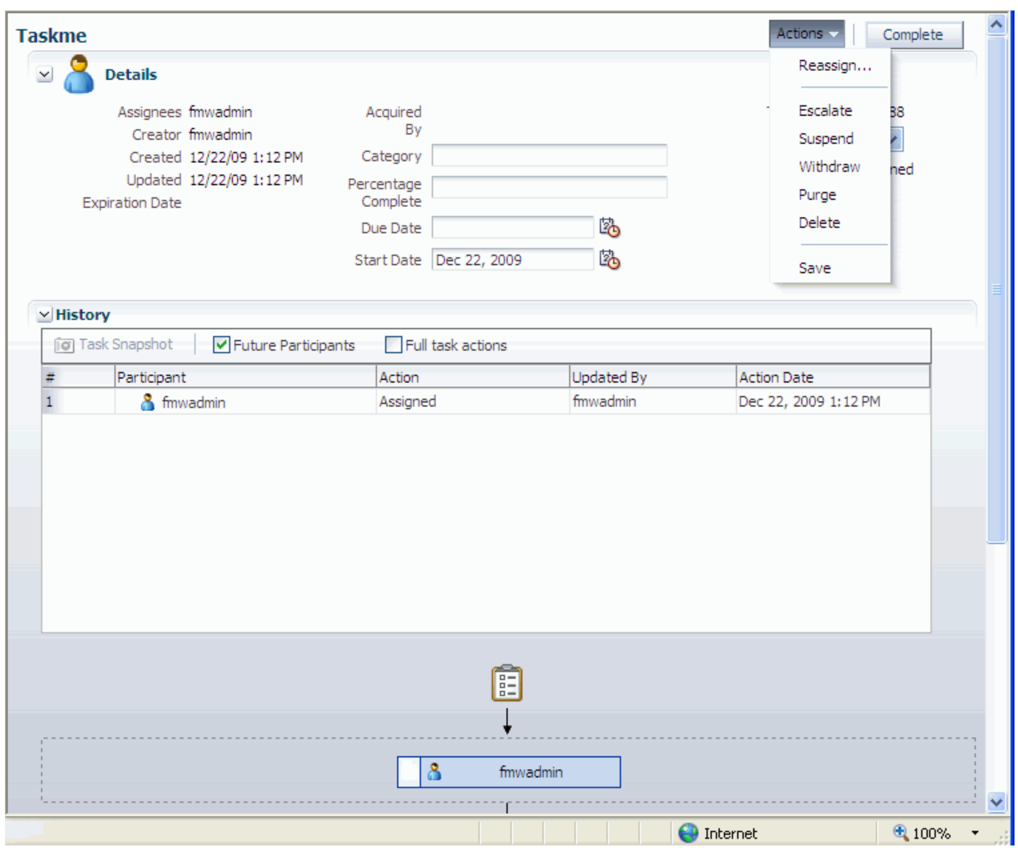


Any Worklist item that is no longer of the `Assigned` state is removed from the Worklist during the next refresh.

Note: Some Worklist items may require actions in the BPEL repository itself. For information about how to respond to such items, see your BPEL documentation.

Figure 31–7 shows the **Actions** menu, which lets you reassign, escalate, suspend, withdraw, purge, or delete your task. When you have performed an action, click **Complete**.

Figure 31–7 Responding to a Task



31.3.2 Setting Messaging Preferences

The Worklist Messaging preferences icon provides access to controls for specifying your messaging preferences on the User Messaging Service. Use messaging preferences to specify the channels over which to receive User Messaging Service messages and to define messaging filters. User Messaging Service messages may include Worklist notifications in addition to other notifications and alerts from other consumers of the server.

Messaging channels are the channels over which messages, notifications, and alerts are received from the User Messaging Service. These include mail, voice over internet (VoIP), and the like. Messages, notifications, and alerts come from the services that are registered with the User Messaging Service.

Messaging filters define sorting conditions for messages and specify the channels through which to send messages that meet those conditions.

You can define messaging channels and filters using the User Messaging Preferences dialog. This section provides an overview of how to use this dialog to configure messaging channels and define messaging filters for messages generated from the User Messaging Service. For more information, see the User Messaging Service online help and the chapter "Oracle User Messaging Service Applications" in *Oracle Fusion Middleware Developer's Guide for Oracle SOA Suite*.

To access the User Messaging Preferences dialog from the Worklist task flow:

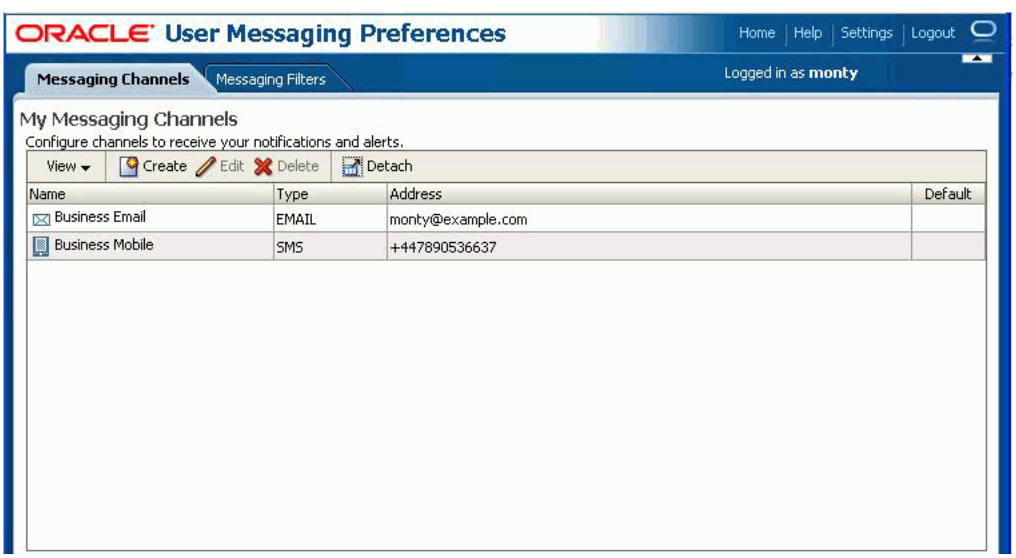
1. Log in to your application.

   For information about logging into Oracle WebCenter Spaces, see Section 2.2.1, "Logging In to WebCenter Spaces."

2. Click the **Messaging preferences** icon in the **Worklist** toolbar and specify credentials to log in to the BPEL server.

> **Note:** In WebCenter Spaces, you can access the Worklist service by expanding the **Worklist** pane or clicking the Worklist icon in the Sidebar.

Figure 31–8 User Messaging Preferences



A web page opens with two tabs (Figure 31–8):

- **Messaging Channels—**Configure channels (such as mail, voice, and so on) to receive your User Messaging Service notifications and alerts.
- **Messaging Filters—**Define rules for filtering your User Messaging Service notifications and alerts.

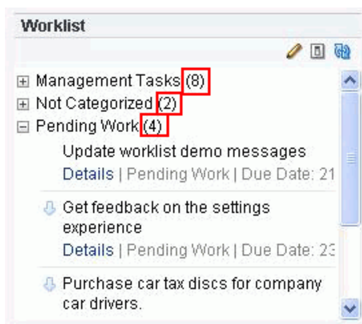
3. Configure channels and filters by referring to the User Messaging Service online help.

31.3.3 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.

You may notice a number next to each group (Figure 31–9). These indicate 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 31–9 Numbers Next to Worklist Groups



To arrange your display of Worklist items:

1. Log in to your application.

   For information about logging in to Oracle WebCenter Spaces, see Section 2.2.1, "Logging In to WebCenter Spaces."

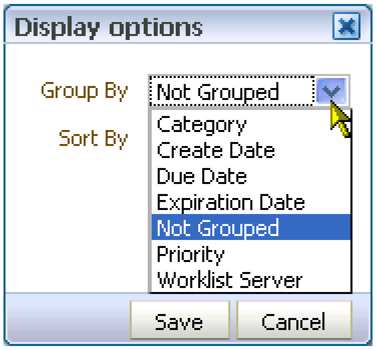
2. Click the Display Options icon at the top of the Worklist on your application page.

   Note: In WebCenter Spaces, you can access the Worklist by expanding the **Worklist** pane or clicking the Worklist icon in the Sidebar.

   ---

3. In the Display Options dialog box, expand the **Group By** list (Figure 31–10), and select an option for grouping your Worklist items.

Figure 31–10 The Worklist Group By List



Choose from:

- **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 might 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 31–1 illustrates the priority indicators that are used in the Worklist.

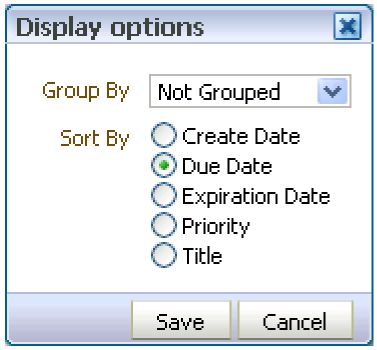
Table 31–1 Worklist Priority Indicators

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 31–11).

Figure 31–11 Sort By Options in the Worklist Display Options Dialog Box



Choose from:

- **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 31–1 for illustrations of priority indicators).
- **Title**—Sort Worklist items first from 0 to 9 then from a to z.

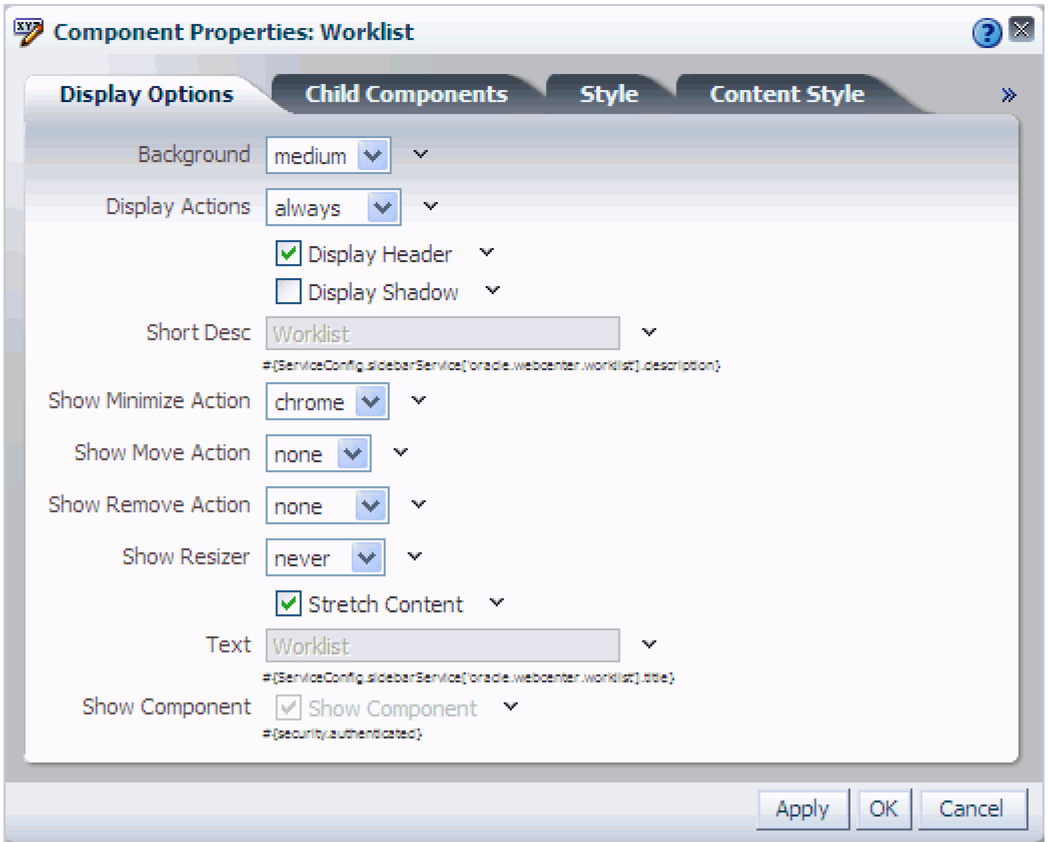
5. Click **Save** to save your changes and close the Display Options dialog box.

   The Worklist displays newest created 25 items per Worklist server connection. For items exceeding the 25-item limit, follow the link to the BPEL Worklist Application, where you can view and act on a larger volume of Worklist items.

31.4 Setting Worklist Service Task Flow Properties

The Worklist service task flows have associated properties, which users with sufficient privileges can access through the Component Properties dialog in Oracle Composer (Figure 31–12). Many properties are common to all task flows, and the method for accessing task flow properties is the same from task flow to task flow. Common task flow properties and how to access them are discussed in Section 10.4, "Setting Properties on Page Content."

Figure 31–12 Worklist Task Flow Component Properties



Changes to the properties on the **Display Options**, **Style**, and **Content Style** tabs affect the appearance and behavior of the task flow for all users. These properties are common to all task flows. For more information, see Section 10.4.4, "Working with Component Display Options" and Section 10.4.7, "Working with Style and Content Style Properties."

The contents of the **Events** tab depend on the events supported by the task flow. For more information, see Section 10.4.8, "Working with Component Contextual Events."

The **Child Components** tab displays all of the components contained within the current component. It provides controls for rearranging, showing, and hiding child components. Not all components contain children. So you may find this tab devoid of content. For more information, see Section 10.4.6, "Working with Child Components."

All properties on **Display Options** tab provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the **Edit** icon next to a property field to open the editor. For more information about using the editor and for descriptions of common EL expressions, see Section 10.4.5, "Using Expression Language (EL) Expressions with Component Properties."

Part VI

Working with Portlets

Part VI of the User's Guide provides information about portlets, including a portlet overview and instructions for using OmniPortlet and the Web Clipping portlet. It contains the following chapters:

32 What You Should Know About Portlets

This chapter provides an overview of portlets. It contains the following sections:

- Section 32.1, "What Is a Portlet?"
- Section 32.2, "What Does a Portlet Look Like?"
- Section 32.3, "What Can I Do with Portlets?"
- Section 32.4, "What Kinds of Portlets Can I Use?"

Note: In WebCenter Spaces, avoid adding a portlet to a Movable Box layout component (see Chapter 9, "Working with Page Layout Components"). The Movable Box layout component duplicates the `showDetailFrame` that the portlet provides by default. Adding a portlet to a Movable Box creates an unnecessary and potentially error-prone redundancy.

Audience

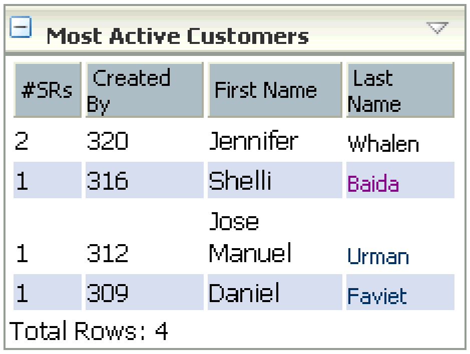
This chapter is intended for users who want to learn about portlets and how they integrate with Oracle WebCenter.

32.1 What Is a Portlet?

Portlets provide a means of presenting data from multiple sources in a meaningful and related way. Portlets can display excerpts of other web sites, generate summaries of key information, perform searches, and access assembled collections of information from a variety of data sources. Because different portlets can be placed on a common page, you receive a single-source experience, though the content may be derived from multiple sources.

Figure 32–1 illustrates the Most Active Customers portlet. As the name suggests, this portlet shows the most active customers of a business unit.

Figure 32–1 The Most Active Customers Portlet


Most Active Customers

#SRs	Created By	First Name	Last Name
2	320	Jennifer	Whalen
1	316	Shelli	Baida
1	312	Jose Manuel	Urman
1	309	Daniel	Faviet

Total Rows: 4

32.2 What Does a Portlet Look Like?

Figure 32–2 illustrates what a portlet typically looks like on a page in a WebCenter application. Note that the same portlet displayed in a different application could look different.

Figure 32–2 Portlet Anatomy

- **Portlet chrome.** The collection of visual elements that surround the portlet, including the header, border, resize handle, and icons.
- **Portlet header.** The area of the portlet that displays the portlet title and the icons that enable interaction with the portlet. The user who added the portlet to the page may have chosen to not display the portlet header.
- **Portlet title.** Text in the portlet header that indicates the purpose of the portlet. You may be able to personalize this title to make it more meaningful for your particular usage.

- **Minimize/Expand icon.** An icon in the portlet header. Clicking the Minimize icon causes the portlet content to collapse so that only the portlet header is displayed. This saves space on the page and reduces clutter without permanently removing the portlet from the page. When the portlet is minimized, the icon becomes an Expand icon that you can click to display the content again.
- **Actions icon.** An icon in the portlet header. Clicking the Actions icon displays the Actions menu.
- **Actions menu.** Lists the actions that you can perform on the portlet. The actions depend on whether you are logged in, your privileges, the logic of the portlet, and the specifics of how the portlet was placed on the page. Actions include Personalize, Maximize, Restore, Refresh, and Move Up or Down. If the portlet provides modes such as Help and About, these are also listed in the Actions menu.

  If the user who added the portlet to the page chose to not display a portlet header, the Actions menu is displayed on a fade in/fade out toolbar that displays on mouse rollover.
- **Resize handle.** Enables you to make the portlet bigger or smaller.
- **Portlet content.** The actual content of the portlet as determined by the portlet developer.

The appearance of a portlet is determined by the internal logic of the portlet itself, as written by the portlet developer, the attributes specified by the user who added the portlet to the page, and any of your own personalizations. For example, the portlet developer can determine, during portlet creation, whether users can personalize the portlet at runtime. The user who adds the portlet to a page can decide whether the personalize option is displayed in the **Actions** menu. The user at runtime can minimize the portlet so that the content is not even displayed on the page.

32.3 What Can I Do with Portlets?

If your application includes portlets, and you are logged in, you can edit those portlets to make them display the information that you, personally, want to see (this is known as personalization). To personalize a portlet, click the **Actions** icon in the portlet header and choose **Personalize** from the menu. The personalizations you can make depend on how the portlet developer designed the portlet. You can also hide portlets, or remove them entirely from the page. Note that the changes that you make apply only to you. If you delete a portlet, other users can still see it when they view the page (unless they have deleted it themselves).

If you have the appropriate privileges, you can also edit the way the portlet appears to all users (this is known as customization). To customize a portlet, click the **Actions** icon in the portlet header and choose **Customize** from the menu. The changes you make are visible to all users.

If you have the appropriate privileges to edit a page in a WebCenter application, you can add portlets to that page. The portlets you can add depend on the *producers* that have been registered with the application. A producer is the object that owns the portlet and makes it available to an application. If you cannot find a particular portlet, ask your WebCenter application administrator to register the associated producer for you. For information about adding portlets to a page, see Section 10.1.5, "Adding Portlets to a Page."

32.4 What Kinds of Portlets Can I Use?

There are several different kinds of portlets available to you. Portlets fall into the following categories: prebuilt portlets provided by Oracle and third-party sources; portlets built for you by your own developers; and portlets that you can build yourself. However, you can only use portlets that the WebCenter application administrator has registered with the application. When it comes to adding portlets to a page, a portlet's category and how it was created are irrelevant; all portlets are listed in the Resource Catalog and are available for inclusion.

This section includes the following subsections:

- Section 32.4.1, "Prebuilt Portlets"
- Section 32.4.2, "JSF Portlets"
- Section 32.4.3, "Programmatic Portlets"
- Section 32.4.4, "Web Clipping"
- Section 32.4.5, "OmniPortlet"
- Section 32.4.6, "Parameter Form and Parameter Display Portlets"

32.4.1 Prebuilt Portlets

Prebuilt portlets include partner portlets and integration solutions.

Partner portlets are available through Oracle's partnerships with leading system integrators, software vendors, and content providers. You can access these portlets by using the keywords `portal` or `portlet` when searching the Oracle PartnerNetwork (OPN) Solutions Catalog, available at:

`http://solutions.oracle.com`

Examples of these include portlets for the following purposes:

- Generating point-to-point driving directions
- Accessing Information Technology (IT) information from a wide variety of sources
- Viewing summary information about news, stocks, and weather

If you think a particular portlet would be useful for your application, ask your WebCenter application administrator to register the appropriate producer for you.

32.4.2 JSF Portlets

JSF portlets expose existing JSF applications and task flows as JSR 168 portlets. They are created using the Oracle JSF Portlet Bridge. The Oracle JSF Portlet Bridge simplifies the integration of JSF applications with WSRP portlet consumers, such as Oracle Portal. Developers create JSF portlets in Oracle JDeveloper using the JSR 168 Java Portlet Wizard or the Portlet Bridge design-time wizard for pages and task flows.

JSF portlets do not require separate source code from that of the JSF application. Since these portlets are created using the Oracle JSF Portlet Bridge, developers need only to maintain one source for both the application and the portlets. Similarly, when the JSF application is deployed, JSF portlets are also deployed with it. Therefore, using the bridge eliminates having to store, maintain, and deploy portlets separately from the application.

32.4.3 Programmatic Portlets

Programmatic portlets are portlets that have been written specifically for your organization to meet a particular requirement not met by the out-of-the-box portlets. Oracle WebCenter Framework provides two declarative wizards for simplifying the creation of standards-based JSR 168 portlets and Oracle PDK-Java portlets. These wizards assist in the construction of the framework within which developers create the portlet.

Some examples of programmatic portlets might be:

- **Photo album portlet.** A portlet that facilitates uploading, storing, and viewing user photos.
- **Shopping cart portlet.** A portlet that facilitates the viewing and purchasing of, for example, company-branded items, such as mouse pads, pens, flash drives, tee shirts, and so on.

Programmatic portlets are written by experienced Java developers who are familiar with the Java Portlet Specification or Oracle PDK-Java. For more information about programmatic portlets, see the *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter*.

32.4.4 Web Clipping

Web Clipping is a publishing portlet that enables you to integrate any web application with your WebCenter application. It is designed to give you quick integration by leveraging the existing user interface of a web application. With Web Clipping, you can collect web content into portlets in a single centralized web page. You can use Web Clipping to consolidate content from web sites scattered throughout a large organization.

To create a Web Clipping portlet, use a web browser to navigate to a web page that contains the desired content. Through the Web Clipping Studio, you can drill down through a visual rendering of the target page to choose the desired content.

Web Clipping supports the following:

- **Navigation through various styles of login mechanisms,** including form- and JavaScript-based submission and HTTP Basic and Digest Authentication with cookie-based session management.
- **Fuzzy matching of clippings.** If a web clipping gets reordered within the source page or if its character font, size, or style changes, it can still be identified correctly by the Web Clipping engine and delivered as the portlet content.
- **Reuse of a wide range of web content,** including basic support of pages written with HTML 4.0.1, JavaScript, applets, and plug-in enabled content, retrieved through HTTP GET and POST (form submission).
- **Personalization,** allowing you to expose input parameters that you can then modify when you personalize the portlet. You can expose these parameters as public parameters that you can map as page parameters. This feature enables you to obtain personalized clippings.
- **Integrated authenticated web content through Single Sign-On**, including integration with external applications, which enables you to leverage Oracle Single Sign-On and to clip content from authenticated external web sites.
- **Inline rendering,** enabling you to set up Web Clipping portlets to display links within the context of the portlet. As a result, when you click a link in the Web

Clipping product, the results display within the same portlet. You can use this feature with internal and external web sites.

- **Proxy Authentication,** including support for global proxy authentication and authentication for each other. You can specify the realm of the proxy server and whether all users automatically log in using a user name and password you provide, each user logs in using an individual user name and password, or all users log in using a specified user name and password.
- **Resource Tunneling** of images.
- **Open Transport API** for customizing authentication mechanisms to clipped sites.

Some examples of how you might use Web Clipping are:

- **Stock chart portlet.** Create a portlet that displays the stock market's daily performance chart from your financial advisor's web site. You can clip this information from an external web site, even if your company is using a proxy.
- **Web mail portlet.** Access your confidential web mail account through a portlet and to display your in-boxes in the portlet.

For more information about using Web Clipping, see Chapter 34, "Working with the Web Clipping Portlet."

32.4.5 OmniPortlet

OmniPortlet is a data publishing portlet that you add to your application at design time, so that users can customize at runtime. Using a wizard, page designers can publish data from a variety of data sources (including SQL, XML, web services, spreadsheets, and web pages) to several different layouts, such as customizable charts and tables.

Like Web Clipping, OmniPortlet supports proxy authentication, including support for global proxy authentication and authentication for each user. You can specify whether all users automatically log in using a user name and password you provide, each user logs in using an individual user name and password, or all users log in using a specified user name and password.

Some examples of how you might use OmniPortlet are:

- **RSS news feed portlet.** Create a portlet that displays live, scrolling news information to your users from a Really Simple Syndication (RSS) news feed, such as Oracle Technology Network Headlines. You can also include hyperlinks to the news source.
- **Sales chart portlet.** Present up-to-date information about your company's sales results. You can choose to display the data as a pie chart and store the sales information in a remote relational database for later use.

For more information about OmniPortlet, see Chapter 33, "Working with OmniPortlet."

32.4.6 Parameter Form and Parameter Display Portlets

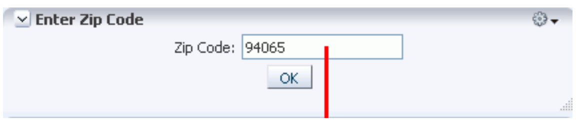
The Parameter Form and Parameter Display portlets provide a quick and easy way to pass values between components. They are provided by the WSRP Tools producer.

The Parameter Form portlet has three output parameters that are set when values are submitted in the form inside the portlet. The parameters can then be used to drive the content of other portlets. You can customize the Parameter Form portlet to determine how many of the three fields are displayed on the form, depending on how many parameters you require.

The Parameter Display portlet enables you to quickly test the wiring from the Parameter Form portlet. However, typically you use the values passed from the Parameter Form portlet to drive the content of some other portlet, for example, to pass a zip code to a weather portlet, or a stock symbol to a stock ticker portlet.

Figure 32–3 shows a Parameter Form portlet that has been customized to accept a single value (Zip Code). When a user enters a zip code and clicks **OK,** the Parameter Display portlet refreshes to display the same zip code.

Figure 32–3 Parameter Form and Display Portlets



For more information about linking portlets, see Chapter 11, "Wiring Pages, Task Flows, Portlets, and UI Components."

33

Working with OmniPortlet

This chapter provides an overview of OmniPortlet and explains the user interface elements associated with OmniPortlet. This chapter contains the following sections:

For information regarding troubleshooting OmniPortlet, see Section 33.5, "Troubleshooting OmniPortlet."

Audience

This chapter is intended for users who want to understand OmniPortlet and learn how to use its features. It introduces how to customize OmniPortlet at runtime and in Spaces, in addition to troubleshooting issues with OmniPortlet.

33.1 What You Should Know About OmniPortlet

OmniPortlet is a subcomponent of Oracle WebCenter Framework that enables developers to easily publish data from various data sources using a variety of layouts without writing any code. You can base an OmniPortlet on almost any kind of data source, including Web services, SQL databases, spreadsheets (that is, files with character-separated values), XML, and even application data from existing Web pages.

Additionally, OmniPortlet enables developers to:

- Sort the data to display
- Format data using a variety of layouts, including a customized layout
- Use portlet parameters
- Expose personalizable settings to page viewers

To display personalized data, you can refine the results returned from a data source and parameterize the credential information used to access secure data. Out of the box, OmniPortlet provides the most common layout for portlets: tabular, chart, news, bulleted list, form, HTML, and parameter form.

Notes: For more information about developing different types of portlets and information about producers and other portlet technologies, see Oracle Fusion Middleware Developer's Guide for Oracle WebCenter.

For more information about adding an instance of OmniPortlet to a page, see Section 10.1.5, "Adding Portlets to a Page."

33.2 Working with the OmniPortlet Wizard

This section includes the following subsections:

- Section 33.2.1, "Adding an OmniPortlet Instance to a Page"
- Section 33.2.2, "Accessing the OmniPortlet Wizard"
- Section 33.2.3, "Selecting the Data Source Type"
- Section 33.2.4, "Identifying the Data Source"
- Section 33.2.5, "Setting Filtering Options"
- Section 33.2.6, "Setting View Options"
- Section 33.2.7, "Setting Layout Options"
- Section 33.2.8, "Customizing Your OmniPortlet"

33.2.1 Adding an OmniPortlet Instance to a Page

The steps for adding an instance of OmniPortlet portlet to a page vary between a custom WebCenter application and the WebCenter Spaces application. For one thing, in a custom WebCenter application adding a portlet to a page is a design-time activity, carried out by the application developer. For information about adding OmniPortlet to a page in a custom WebCenter application, see the "Creating Portlets with OmniPortlet" chapter in the *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter*.

In WebCenter Spaces, portlets are added to pages at runtime—when you run the application. Portlets are available for dragging and dropping from the Oracle Composer Catalog by any user with sufficient privileges. For information about adding a portlet to a page in WebCenter Spaces, see Section 10.1.5, "Adding Portlets to a Page."

Note: In WebCenter Spaces, avoid adding a portlet to a Movable Box layout component (For information, see Chapter 9, "Working with Page Layout Components"). The Movable Box layout component duplicates the `showDetailFrame` that the portlet provides by default. Adding a portlet to a Movable Box creates an unnecessary and potentially error-prone redundancy.

When you add an instance of OmniPortlet to a page, access the portlet's Component Properties dialog and ensure that `RenderPortletInIFrame` property is set to true. This displays the OmniPortlet in its own inline frame (IFRAME) in the View mode.

For information about the Component Properties dialog, see Section 33.4, "Setting OmniPortlet Properties."

33.2.2 Accessing the OmniPortlet Wizard

Once you add an instance of OmniPortlet to your page, click the **Customize** link to start the OmniPortlet wizard.

The OmniPortlet wizard initially contains five steps:

1. Select a data source type.
2. Identify the data source.
3. Set filtering options.
4. Set view options.
5. Set layout options.

Once you complete these steps, you're done! If you want to change your initial values, you can reenter the wizard by selecting the **Customize** option from the portlet's **Actions** menu. Tabs representing the steps you took to set up OmniPortlet display. Although the data type cannot be changed, you can revise values on the **Source**, **Filter**, **View**, and **Layout** tabs.

Table 33–1 provides a high-level overview of the steps/tabs provided for configuring an OmniPortlet instance.

Table 33–1 OmniPortlet Wizard and Customize Mode

Step/Tab	Description
Type	Provides your data source options. Displays only in the initial definition of the portlet, and is not available when customizing the portlet defaults. For more information, see Section 33.2.3, "Selecting the Data Source Type."
Source	Provides options for configuring the data source connection, such as the URL of the Web Service you want to use. You can change these options later when editing the portlet defaults. For more information, see Section 33.2.4, "Identifying the Data Source."
Filter	Provides sorting options at the WebCenter application level to enable you to refine your results. You can change these options later when editing the portlet defaults. For more information, see Section 33.2.5, "Setting Filtering Options."
View	Provides options for displaying portlet header and footer text, the layout style, and caching. You can change these options later when editing the portlet defaults. For more information, see Section 33.2.6, "Setting View Options."
Layout	Provides detailed options for customizing the layout of content retrieved from the data source. You can change these options later when editing the portlet defaults. For more information, see Section 33.2.7, "Setting Layout Options."

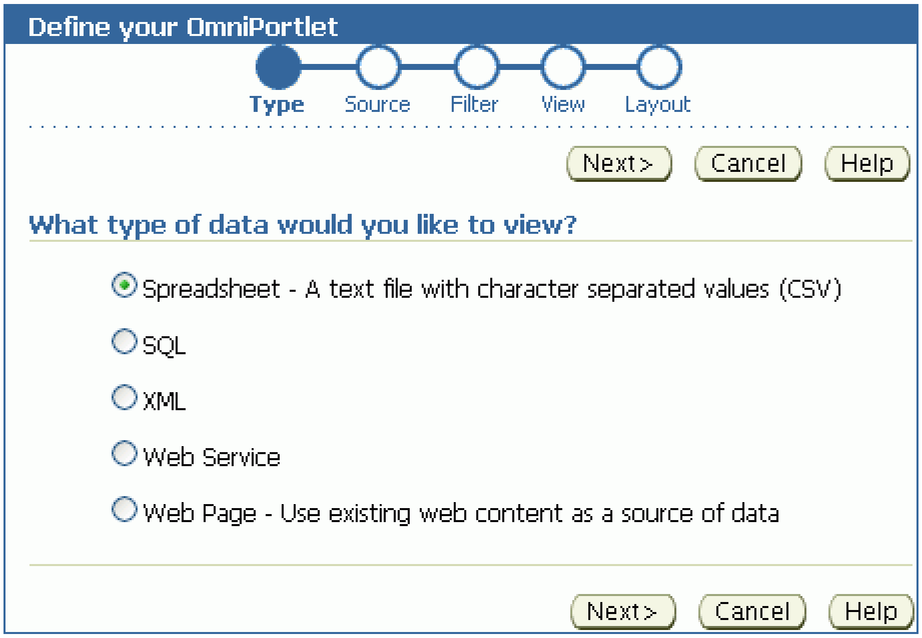
Note: On the IBM Linux on Power platform, if the action buttons (Next, Previous, Finish, and Cancel) are minimized to dots when defining the OmniPortlet, increase the stack size shell limit to unlimited and restart the oc4j_portlet instance. Run the following command to set the stack size shell limit to unlimited: `prompt> ulimit -s unlimited`.

The following sections provide more detail about the different steps/tabs in the OmniPortlet wizard.

33.2.3 Selecting the Data Source Type

When you first start OmniPortlet, the Type step displays (Figure 33–1).

Figure 33–1 Type Tab of the OmniPortlet Wizard



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Use the Type step to identify the type of data to display in your OmniPortlet instance. Table 33–2 lists and describes the data types that OmniPortlet supports out-of-the-box.

Table 33–2 OmniPortlet Supported Data Source Types

Data Source Type	Description
Spreadsheet	Displays data from a text file containing character-separated values (CSV).
SQL	Displays data from a database using SQL.
XML	Displays data from an XML file.
Web Service	Displays data from a discrete business service that can be accessed over the Internet using standard protocols.
Web Page	Displays data based on existing Web content.

After you complete the OmniPortlet wizard, you cannot change the data source type.

33.2.4 Identifying the Data Source

Once you choose a data type, you're ready to identify a data source. The **Source** tab renders according to the data type you selected in step 1. That is, the options that display on the **Source** tab vary according to the selected data type.

Additionally, if the OmniPortlet producer has been configured to use a proxy server requiring authentication, the **Source** tab contains a **Proxy Authentication** section and a **Connection** section where you can provide the necessary information for connecting to the data source.

This section contains information about the settings common to all **Source** tabs, including settings specific to the selected data type. It contains the following subsections:

- Section 33.2.4.1, "Proxy Authentication"
- Section 33.2.4.2, "Connection and Portlet Parameters"
- Section 33.2.4.3, "Spreadsheet"
- Section 33.2.4.4, "SQL"
- Section 33.2.4.5, "XML"
- Section 33.2.4.6, "Web Service"
- Section 33.2.4.7, "Web Page"

33.2.4.1 Proxy Authentication

If the OmniPortlet producer was set up at design time to use proxy authentication that requires login credentials, then a **Proxy Authentication** section displays on the **Source** tab where you can enter this information.

OmniPortlet's support for proxy authentication includes support for global proxy authentication and authentication for each user, which means you can specify a login scenario for your OmniPortlet instance:

- All users automatically log in using a user name and password you provide.
- Each user logs in using an individual user name and password.
- All users log in using the same specified user name and password.

The **Proxy Authentication** section displays only for the following data types, and only when the specific data source requires a proxy server for access:

- CSV (character-separated values)
- XML
- Web Page

Notes: Configuring an OmniPortlet producer is a design-time activity applicable to custom applications (that is, those applications created with Oracle WebCenter Framework). For more information about configuring the OmniPortlet producer to use proxy authentication, see the Oracle WebCenter Framework online Help topic that displays when you click **Help** on the **Edit Producers: OmniPortlet Producer** page.

If the OmniPortlet producer is configured to require login for all users, then each user must set his or her own proxy login information at runtime as follows:

- For page designers, set this on the **Customize: Source** tab.
- For page viewers, set this on the **Personalize** page.

To access the **Customize: Source** tab, click the **Customize** link on the portlet's **Actions** menu. To access the **Personalize** page, click the **Personalize** link on the portlet's **Actions** menu.

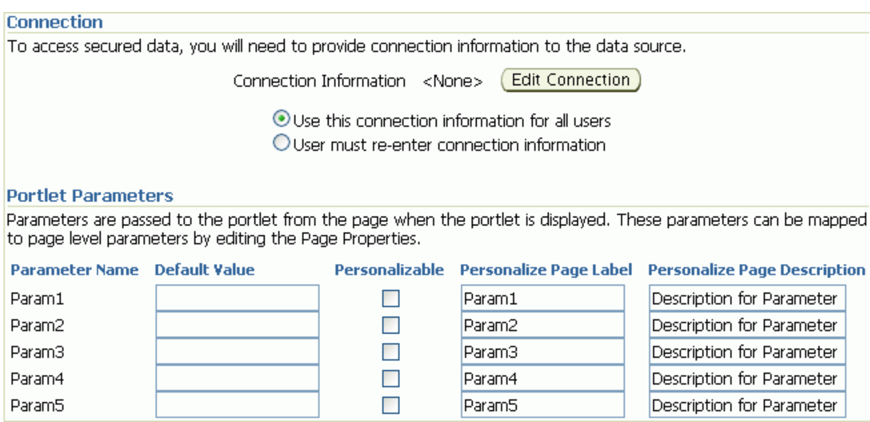
If you are using the Web Page data source, then the **Proxy Authentication** section displays in the Web Clipping Studio when you click the **Select Web Page** button on the **Source** tab.

For more information about Web Clipping Studio, see Chapter 34, "Working with the Web Clipping Portlet."

33.2.4.2 Connection and Portlet Parameters

For each data source—except the Web Page data source—the **Source** step contains a **Connection** section, where you can define connection information for accessing secured data. The **Source** step for all data sources includes a **Portlet Parameters** section, where you can define portlet parameters (Figure 33–2).

Figure 33–2 Source Tab: Connection and Portlet Parameters Sections

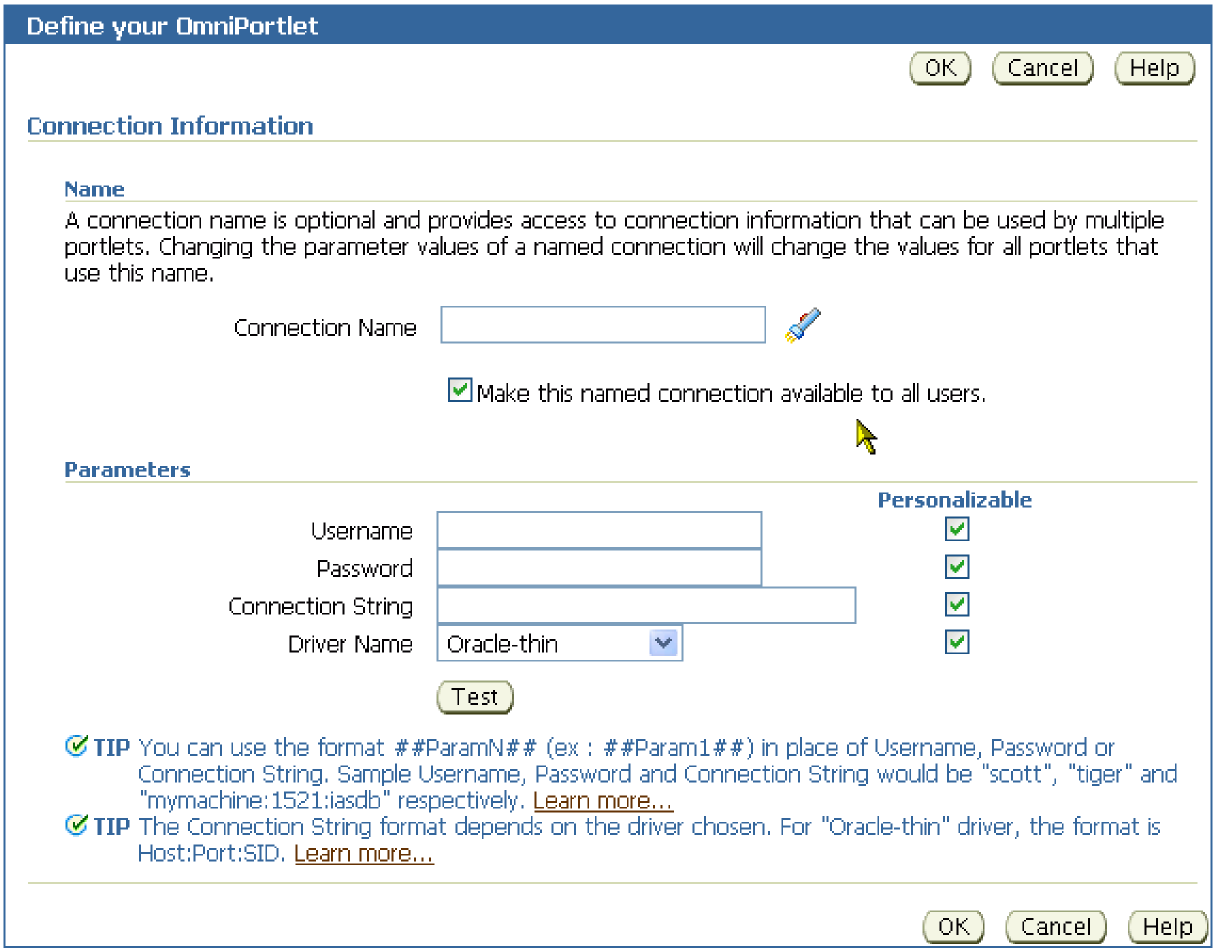


Note: You can use the format `##ParamN##` (for example, `##Param1##`) for **Username**, **Password**, or **Connection String**. The **Test** button returns an error, however, even though the connection information is correct when parameter values are substituted.

Once you define the portlet parameters, you can map them to page parameters. For more information, see Section 33.3, "Working with OmniPortlet Parameters" and Chapter 11, "Wiring Pages, Task Flows, Portlets, and UI Components."

To edit the connection information, click the **Edit Connection** button to open the **Connection Information** page (Figure 33–3).

Figure 33–3 OmniPortlet Connection Information Page for a SQL Data Source



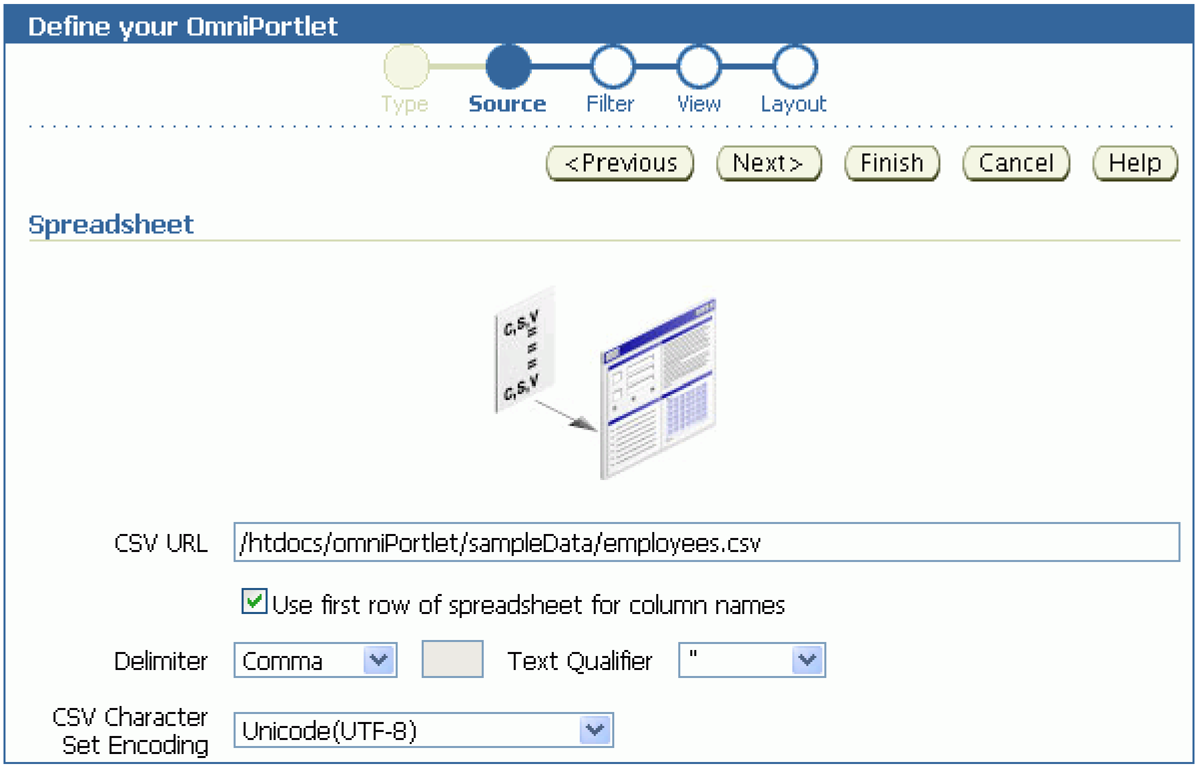
On the **Connection Information** page, you can enter a name for the connection information, and also the user name and password. For a SQL data source, you can also enter information to specify the driver you want to use to connect to the data source. For more information, see Section 33.2.4.4, "SQL."

Note: For more information about the **Connection Information** page, click **Help** on the **Source** tab of the OmniPortlet wizard.

33.2.4.3 Spreadsheet

Spreadsheets are a common method of storing small data sets. OmniPortlet enables you to share spreadsheets by supporting character-separated values (CSV) as a data source. Use the **Source** tab to specify the location of the CSV file (Figure 33–4).

Figure 33–4 Source Tab: Spreadsheet (CSV)



If the file is located on a secure server, then you can specify the connection information in the **Connection Information** section illustrated in Figure 33–3. You can select the character set to use when WebCenter Suite reads the file, and also the delimiter and text qualifier.

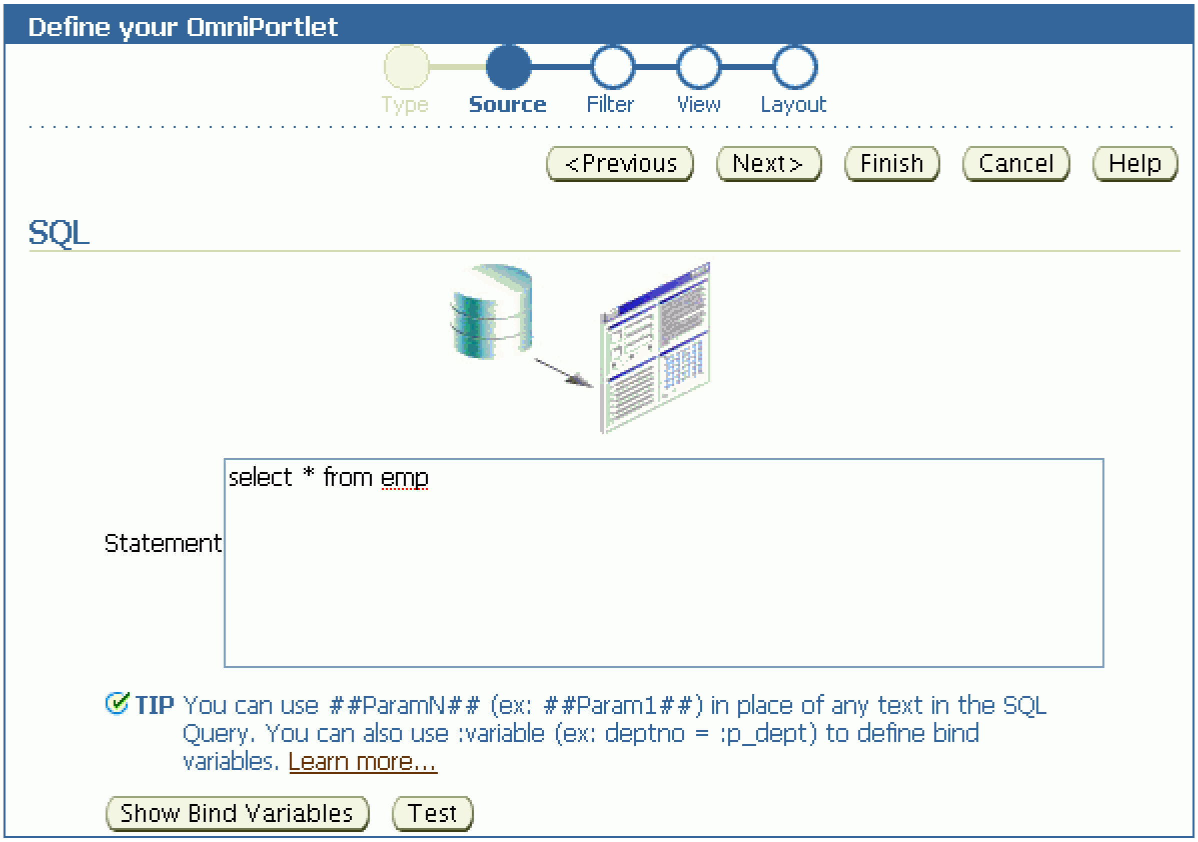
Note: As the OmniPortlet producer exists and executes in a tier different from the WebCenter application and does not have access to the session information, you must expose CSV files as PUBLIC for OmniPortlet to be able to access them.

33.2.4.4 SQL

The relational database is the most common place to store data. OmniPortlet enables you to use standard JDBC drivers and provides out-of-the-box access to Oracle and any other JDBC database. You can specify the driver type when you configure the connection information.

Figure 33–5 shows the **Source** tab for a SQL data source.

Figure 33–5 Source Tab: SQL



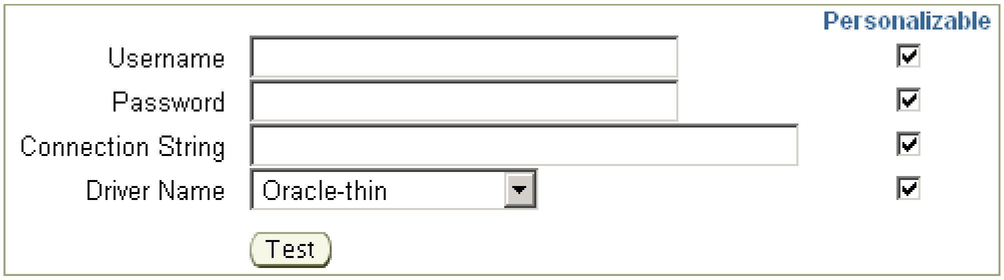
You can use DataDirect JDBC drivers to access other relational databases. To do so, you must configure OmniPortlet to recognize the driver. This is a design-time activity, typically carried out by an application developer.

Notes: For information about configuring OmniPortlet to use DataDirect drivers, see Appendix E, "Additional Portlet Configuration" in the *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter*.

For more information about DataDirect drivers, see the *Certification Matrix for Oracle Application Server and DataDirect JDBC* on the Oracle Technology Network (OTN) at `http://www.oracle.com/technology`.

Once the driver is installed, it displays on the **Driver Name** dropdown list on the **Connection Information** page (Figure 33–6).

Figure 33–6 Driver Name Dropdown List on the Connection information Page

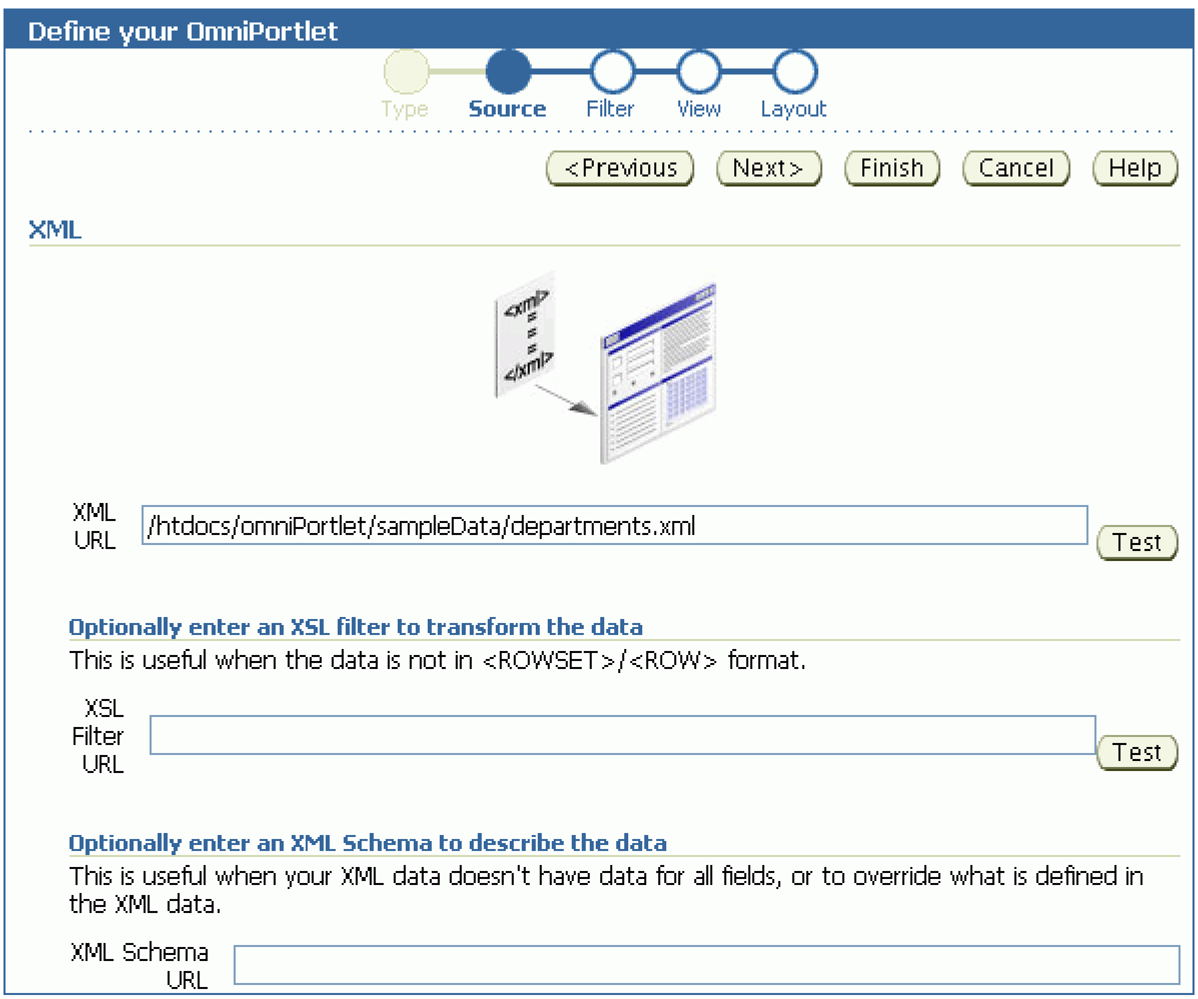


When you enter a connection string for a DataDirect driver, keep in mind that you must enter a value in the **Connection String** field using the syntax: `host_name:port`. The *host_name* is the name of the server where the database is running. The *port* is the database's listening port.

33.2.4.5 XML

You can access XML data sources across an intranet or the Internet. On the **Source** tab, you can specify the URL of the XML file that contains your data (Figure 33–7).

Figure 33–7 Source Tab: XML



Use the **Test** buttons next to the **XML URL** and the **XSL Filter URL** fields to validate your XML data source and the XSL filter.

The specified XML file can be in a tabular (ROWSET/ROW) structure, or you can provide an XML Style Sheet (XSL) that transforms data into the ROWSET/ROW structure. Example 33–1 provides an illustration of the ROWSET/ROW structure of an XML data source.

Example 33–1 ROWSET/ROW Structure of an XML Data Source

```
<TEAM>
  <EMPLOYEE>
    <DEPTNO>10</DEPTNO>
    <ENAME>KING</ENAME>
    <JOB>PRESIDENT</JOB>
    <SAL>5000</SAL>
  </EMPLOYEE>
    <DEPTNO>20</DEPTNO>
    <ENAME>SCOTT</ENAME>
    <JOB>ANALYST</JOB>
    <SAL>3000</SAL>
  <EMPLOYEE>
</TEAM>
```

In Example 33–1, the `<TEAM>` tags delineate the rowset, and the `<EMPLOYEE>` tags delineate the rows.

Regardless of the format of the XML file, OmniPortlet automatically inspects the XML to determine the column names, which are then used to define the layout. If you want to specify this information yourself, then you can supply a URL to an XML schema that describes the data.

If the XML file is located on a secured server protected by HTTP Basic Authentication, you can specify connection information on the **Connection Information** page.

> **Note:** Because the OmniPortlet producer exists and executes in a tier different from the WebCenter application and does not have access to the session information, you must expose XML files as PUBLIC in order for OmniPortlet to access them.

33.2.4.6 Web Service

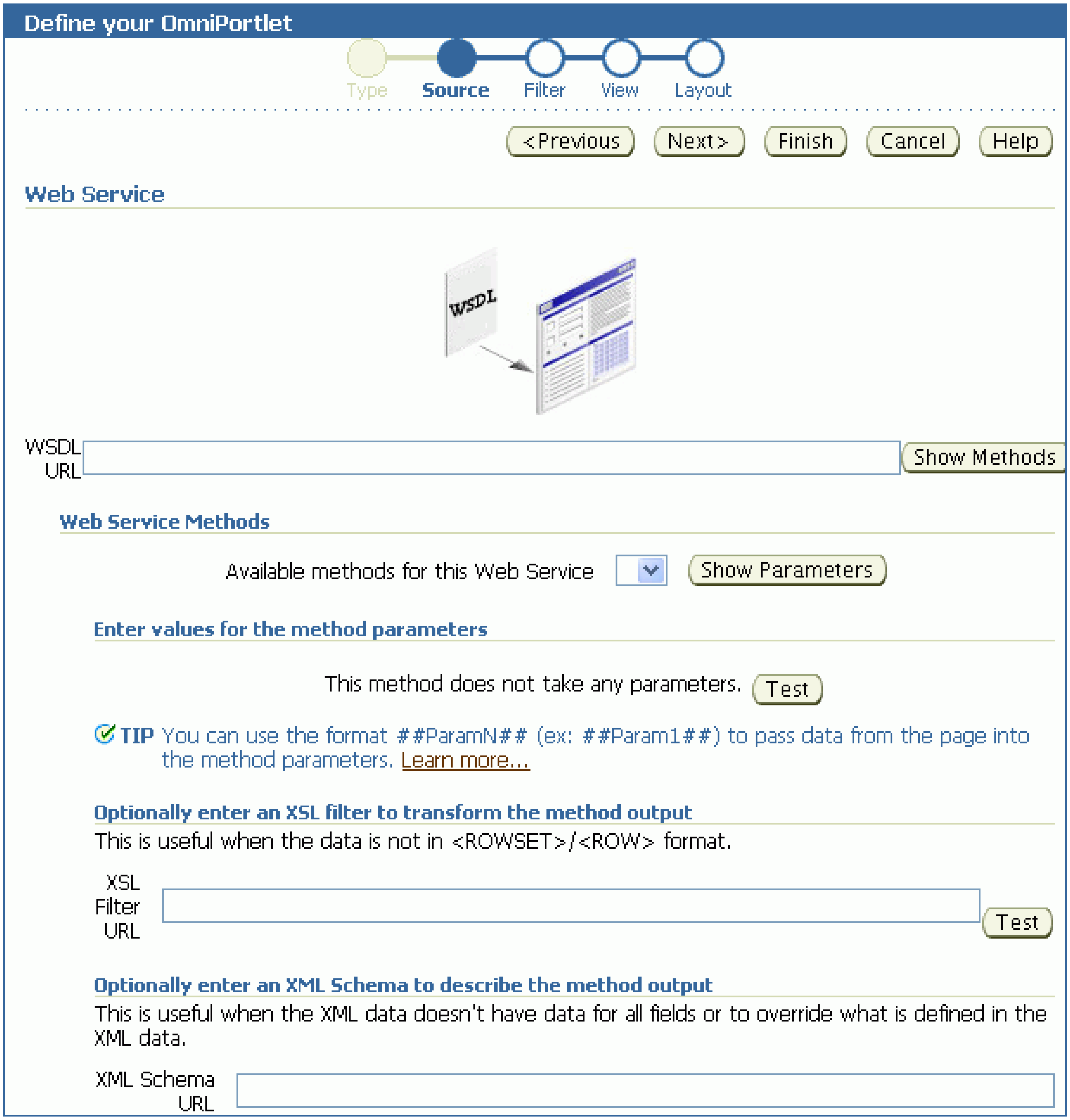
A Web Service is a discrete business service that can be programmatically accessed over the Internet using standard protocols, such as SOAP and HTTP. Web Services are specific to neither platform nor language and are typically registered with a Web Service broker. When you find a Web Service you want to use, you must obtain the URL to the Web Service Description Language (WSDL) file. The WSDL file describes the Web Service and specifies the methods that can be called, including the expected parameters. It also describes the returned data.

OmniPortlet supports both types of Web Services: Document and Remote Procedure Calls (RPC). After a WSDL document/file is supplied, it is parsed, and the available methods that can be called display on the **Source** tab.

Similar to the XML data source, OmniPortlet expects the Web Service data in ROWSET/ROW format, though you can also use an XSL file to transform the data. OmniPortlet inspects the WSDL document/file to determine the column names, though you may also specify an XML schema to describe the returned data set.

Figure 33–8 shows the **Source** tab for a sample Web service.

Figure 33–8 Source Tab: Web Service



33.2.4.7 Web Page

OmniPortlet enables you to use existing Web content as a data source. It integrates the Web Clipping portlet's Web Clipping Studio to provide a means of clipping and rendering Web content within the context of an OmniPortlet instance.

OmniPortlet's Web Page data source extends the scope offered by the Web Clipping portlet to include scraping functionality. Additional features include:

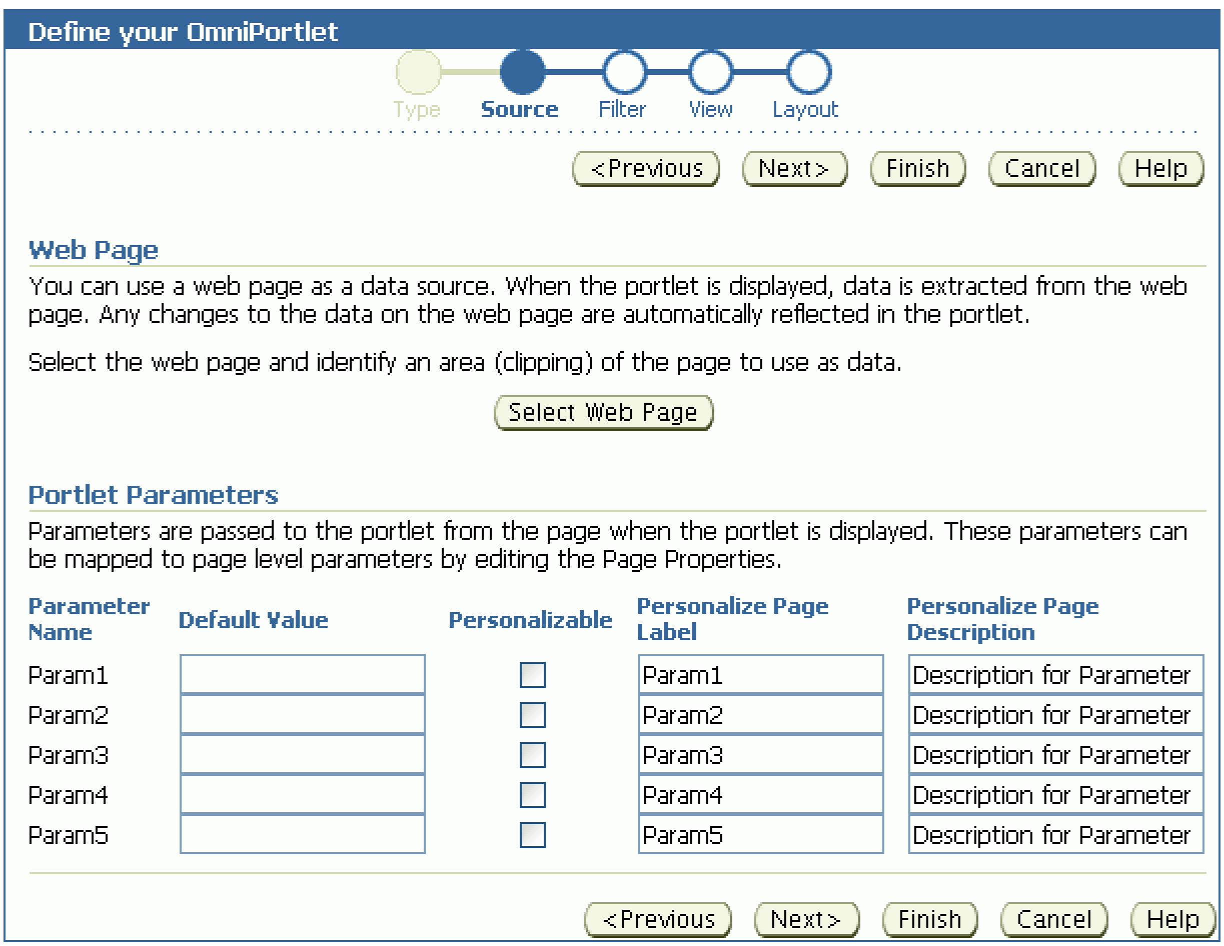
- **Navigation through various login mechanisms**, including form- and JavaScript-based submission, and HTTP Basic and Digest Authentication with cookie-based session management.
- **Fuzzy matching of clippings.** If a Web clipping gets reordered within the source page or if its character font, size, or style changes, then it is still identified correctly by the Web page data source and delivered as the portlet content.
- **Reuse of a wide range of Web content**, including basic support of pages written with HTML 4.0.1 and JavaScript, retrieved through HTTP GET and POST (form submission).

By default, all Web clipping definitions are stored persistently in Oracle Metadata Services (MDS). However, you can also use an Oracle database. Using MDS does not require any changes in the configuration files. If you use an Oracle database as the Web Clipping repository, then at design time you must update the `provider.xml` file.

Any secure information, such as passwords, is stored in encrypted form, according to the Data Encryption Standard (DES), using Oracle Database encryption technology.

When `Web Page` is selected as the data type, the OmniPortlet wizard's **Source** tab (Figure 33–9) includes a **Select Web Page** button that kicks off Web Clipping Studio.

Figure 33–9 Source Tab: Web Page



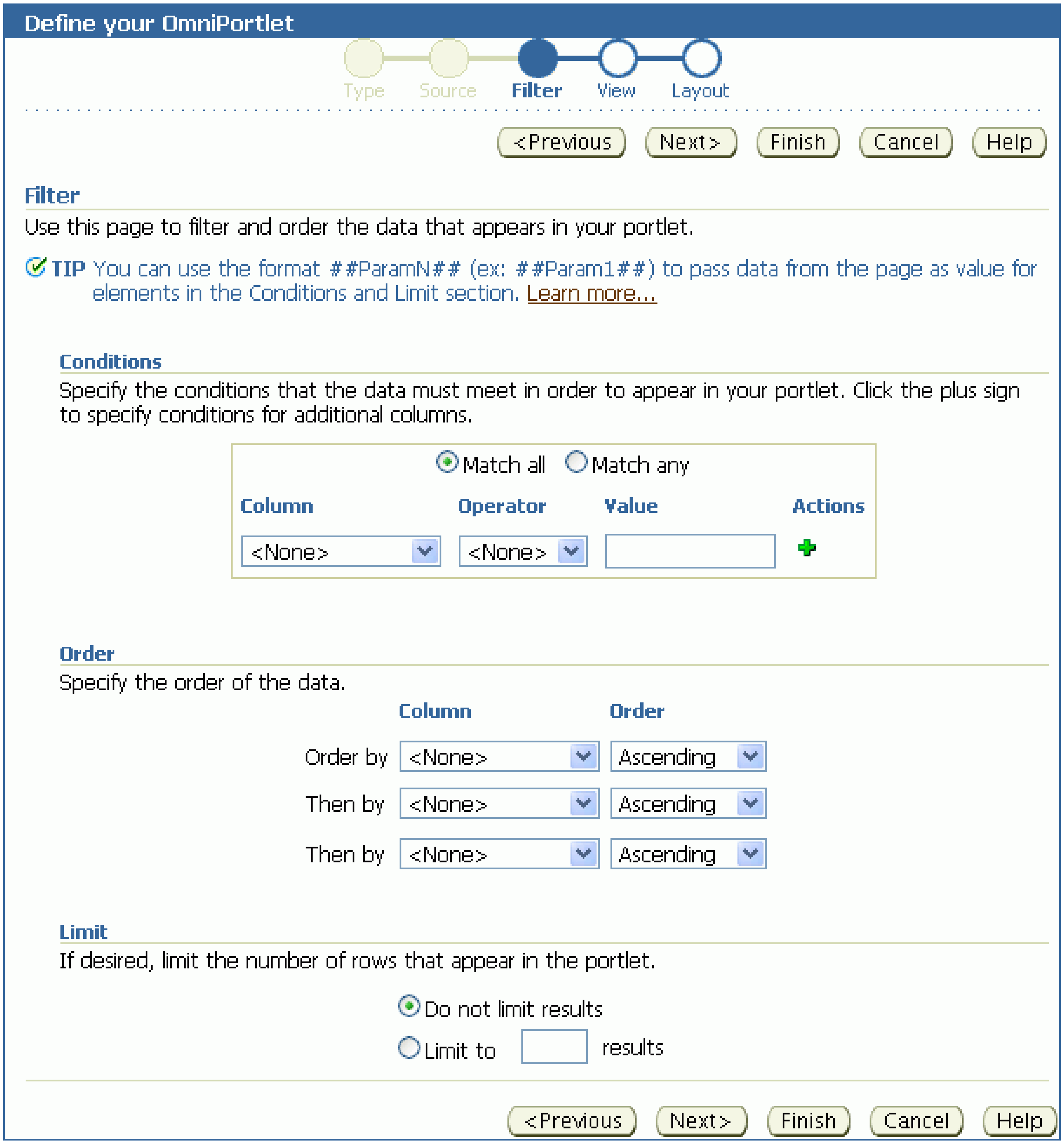
Within Web Clipping Studio, the Oracle Application Server Web Clipping online Help becomes available through the **Help** icon at the top of the page. You can use the Help to navigate your way through the process of sectioning and saving Web content.

Note: For more information about using the Web Clipping Studio or clipping content for a Web Clipping Portlet, see Chapter 34, "Working with the Web Clipping Portlet."

33.2.5 Setting Filtering Options

Once you've selected the data source and specified the data source options, you can further refine your data using OmniPortlet's filtering options. To use filtering efficiently, it is better to refine the data as much as possible at the data source level on the **Source** tab, then use the options on the **Filter** tab to streamline the data. For example, if you are using a SQL data source, then you could use a `WHERE` clause to return only specific data from the specified columns. In this case, you could skip the **Filter** tab and continue to the wizard's **View** tab. However, if there are no filtering options at the data source level, then you can use the options on the **Filter** tab to sort your data (Figure 33–10).

Figure 33–10 Filter Tab



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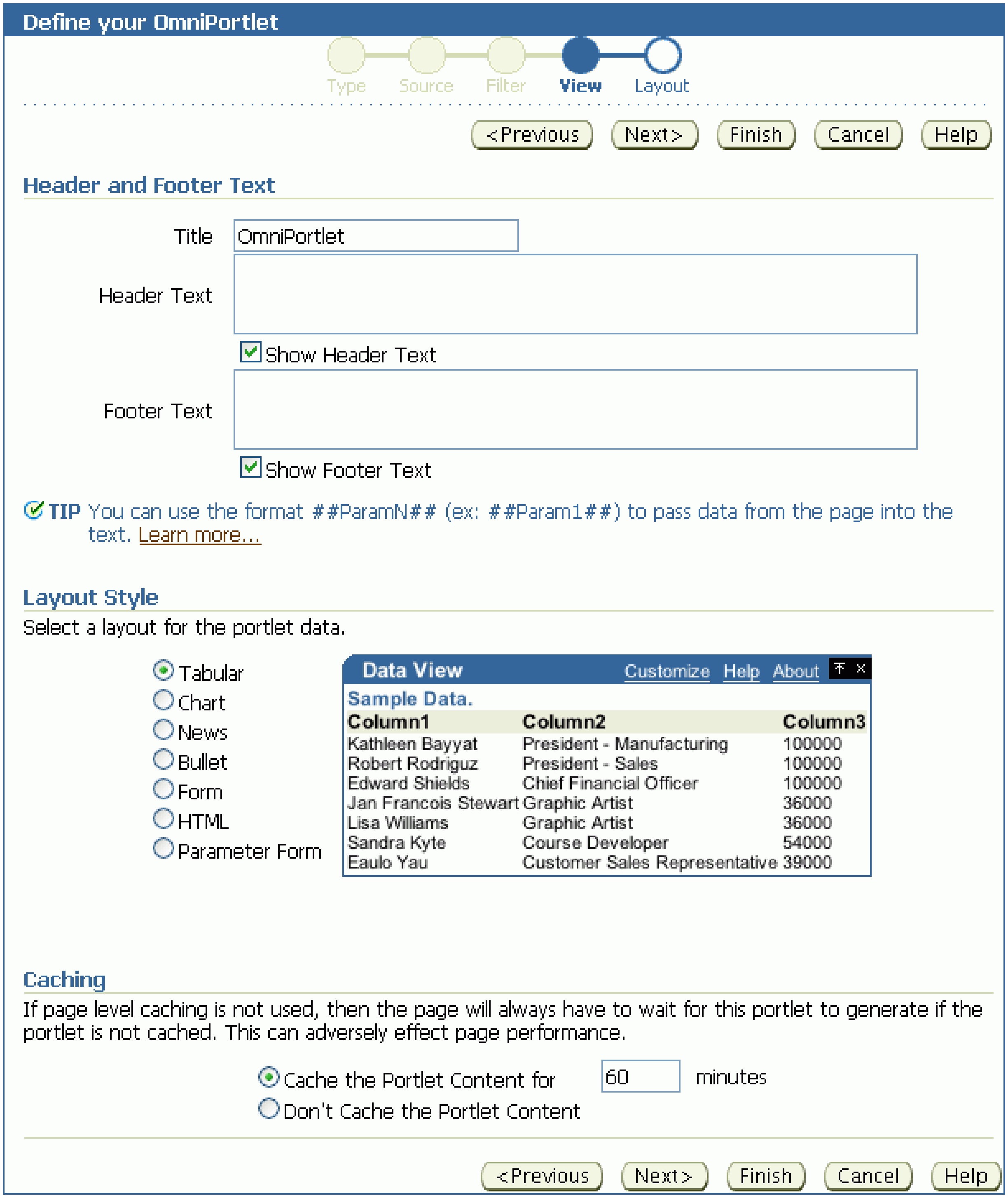
33.2.6 Setting View Options

Once you've specified and filtered the data, you're ready to choose view and layout options for your OmniPortlet. The **View** tab (Figure 33–11) provides options for adding header and footer text, enabling caching, and choosing a layout style that you can later refine on the **Layout** tab.

Figure 33–11 View Tab



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On the **View** tab, you can choose from the following layouts:

- Tabular
- Chart

- News
- Bullet
- Form
- HTML
- Parameter Form

Note: For more information about the different layout styles you can use with OmniPortlet, see the next section or click **Help** in the OmniPortlet wizard.

33.2.7 Setting Layout Options

The **Layout** tab enables you to further customize the appearance of your OmniPortlet. The options on the **Layout** tab change according to your selection on the **View** tab. For example, when you select **Chart Layout** options are provided for setting up chart hyperlinks. With chart hyperlinks, clicking a specific part of the chart triggers an event (for example, a jump to another URL).

For the other layout styles, you can define each column to display in a specific format, such as plain text, HTML, an image, a button, or a field. For example, suppose you selected a data source that includes a URL to an image. To see this image, you can select **Image** for the display of this column. Each column can also be mapped to an action, similar to the behavior of chart hyperlinks.

This section includes the following subsections that provide more detail about the layout options available on the OmniPortlet **Layout** tab:

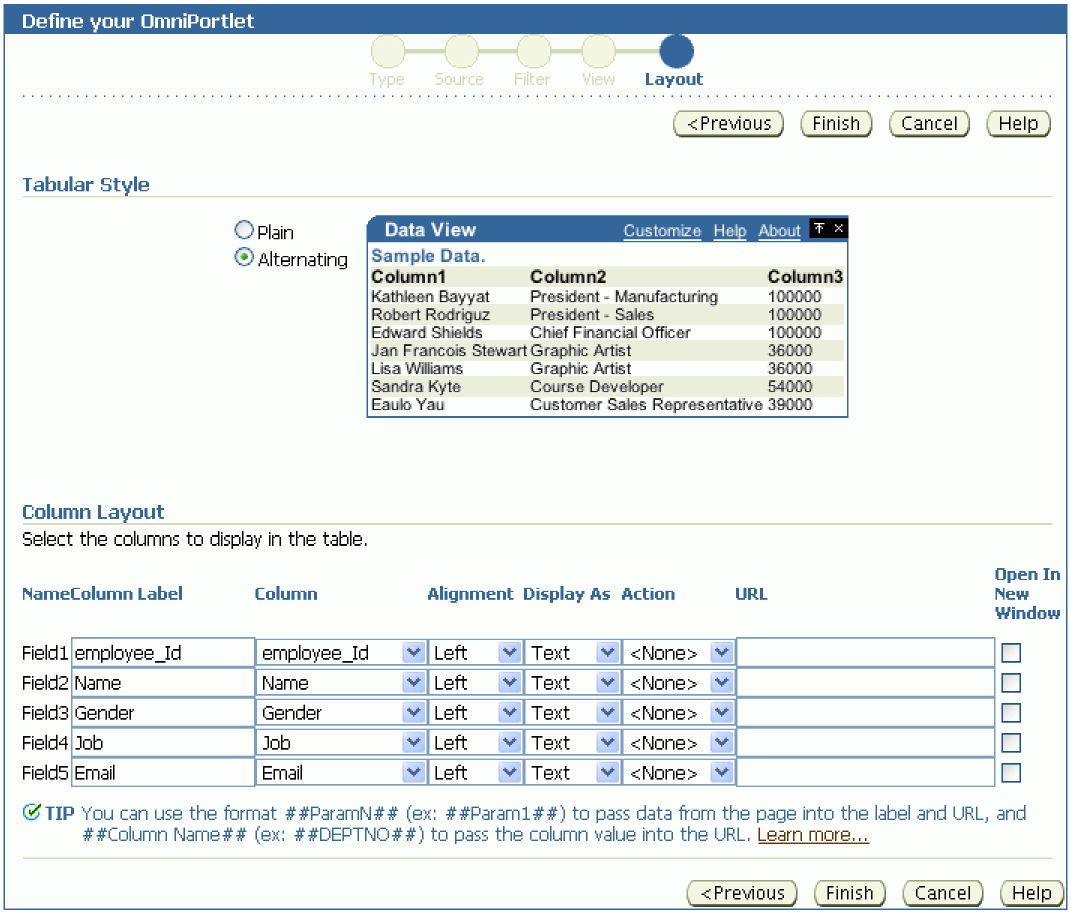
- Section 33.2.7.1, "Tabular Layout"
- Section 33.2.7.2, "Chart Layout"
- Section 33.2.7.3, "News Layout"
- Section 33.2.7.4, "Bullet Layout"
- Section 33.2.7.5, "Form Layout"
- Section 33.2.7.6, "HTML Layout"
- Section 33.2.7.7, "Parameter Form Layout"

Note: Because events are not currently supported, selecting an action when designing your layout may produce unexpected results.

33.2.7.1 Tabular Layout

Typically, you use tabular layout when you have one or more columns of data to display in a table. You can choose **Plain** to display all rows in the table without any background color, or **Alternating** to display a background color for every other row in the table (Figure 33–12).

Figure 33–12 Layout Tab: Tabular



Note: You can control the background color of a portlet using its style properties. Portlet style properties are exposed through the Properties panel in Oracle Composer. For more information, refer to Setting OmniPortlet Properties.

The **Column Layout** section provides options for selecting the data columns to display in the portlet and a display format. Additionally, you can associate a URL with a column to display column data as a hyperlink. You can also specify whether the secondary Web page displays in a new window. Figure 33–13 shows an example of an OmniPortlet using a tabular format.

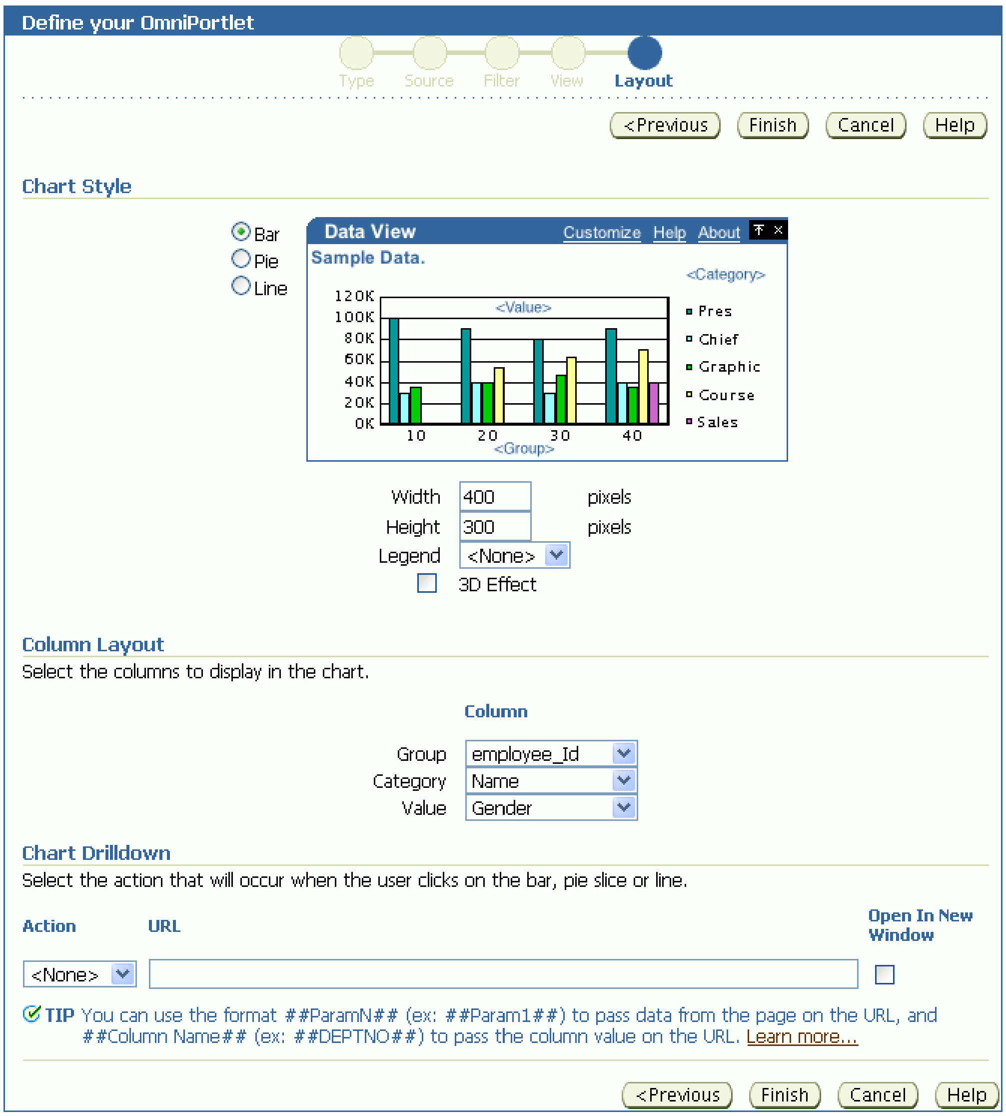
Figure 33–13 Example of an OmniPortlet Using a Tabular Layout

Note: For more information about using the OmniPortlet wizard, click the **Help** link on the **Layout** tab.

33.2.7.2 Chart Layout

Use the chart layout to display your data graphically, as a bar, pie, or line chart. The **Layout** tab (Figure 33–14) provides options for specifying the chart style to use (**Chart Style**) and the data source columns to display (**Column Layout**).

Figure 33–14 Layout Tab: Chart



Under the **Column Layout** section, you can choose the data source columns to use in the chart (**Group**); the values to use in creating the chart legend (**Category**); and the relative size of the chart's bars, lines, or pie slices (**Value**).

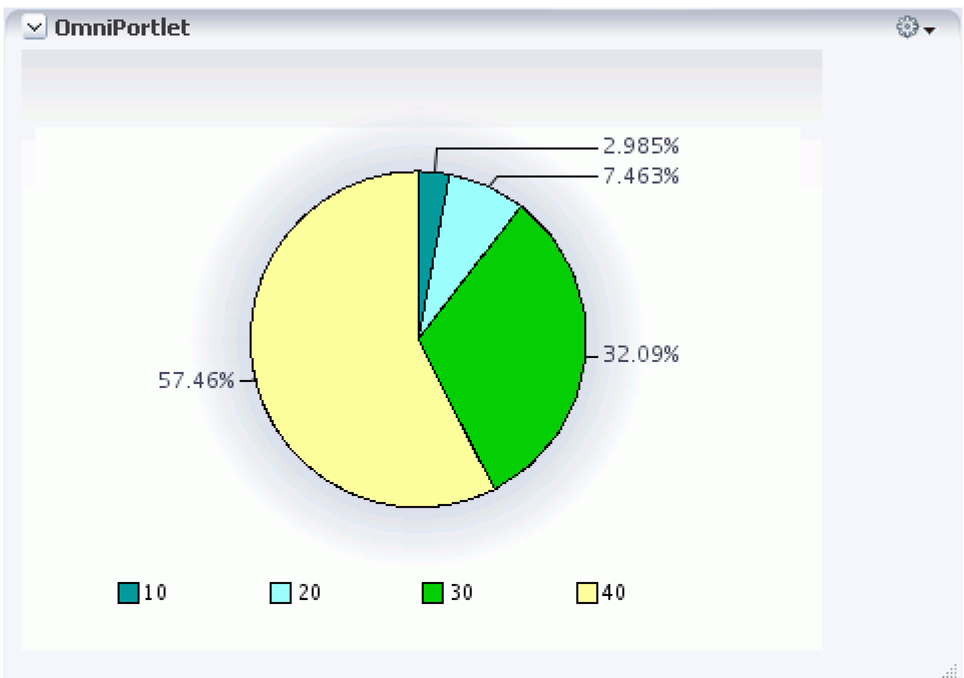
Note: To group the information in the chart, you must group the information at the data level (for example, in your SQL query statement). Also, if numeric values in a data source contain formatted strings, commas, or currency (for example, $32,789.00), then they are considered to be text and ignored when the chart is generated. You should remove these formatting characters if you want them to be correctly read as numeric values.

You can also select whether the sections of the chart should point to a hyperlink, and whether the link target should display in a new window.

You can define chart hyperlinks so that each bar, pie section, or line links to another Web page. For example, you can place a pie chart and a report portlet on your page, then set up hyperlinks on the pie wedges. Users click a wedge to display a row in the report with detailed information about the wedge data.

Figure 33–15 displays an example of a pie chart. In this example, the **Category** value `DEPARTMENT` is used as the chart legend.

Figure 33–15 Example of an OmniPortlet Using a Pie Chart Layout

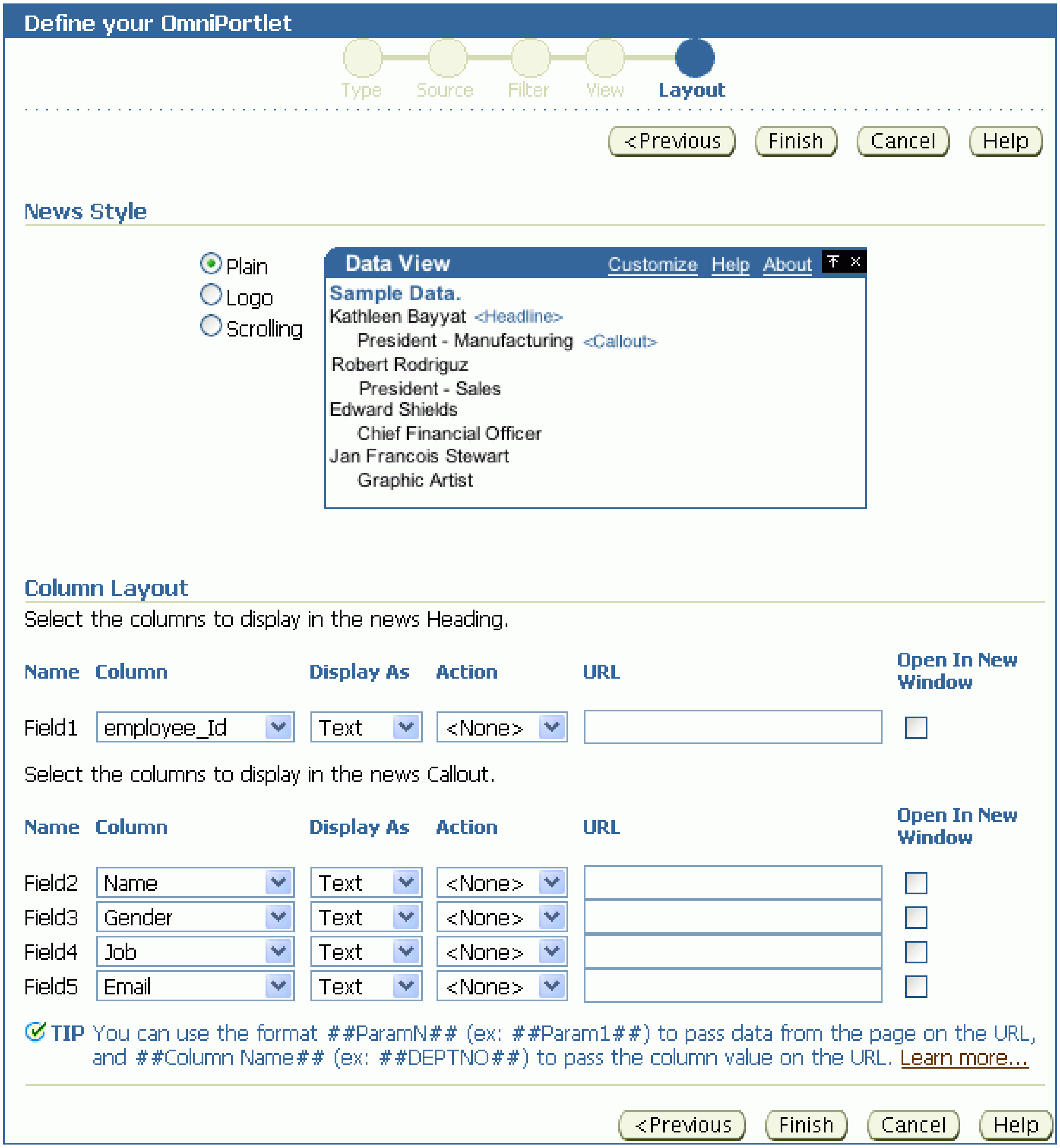


33.2.7.3 News Layout

Use the News layout to display links to articles and brief article descriptions. You can use the News layout to publish information in standard XML formats, such as Resource Description Framework (RDF) or RSS (Really Simple Syndication).

Use the **Column Layout** section (Figure 33–16) to add a heading that displays at the top of the portlet, a logo, or a scrolling layout that enables users to view all the information in the portlet as it moves vertically.

Figure 33–16 Layout Tab: News



Note: The OmniPortlet News Layout Scroll type is supported on Microsoft Internet Explorer and Netscape 7.0.

The **Layout** tab also provides options for associating a URL with column data. Users click column data in the portlet to navigate to your specified target location.

Figure 33–17 shows an example OmniPortlet using a News layout.

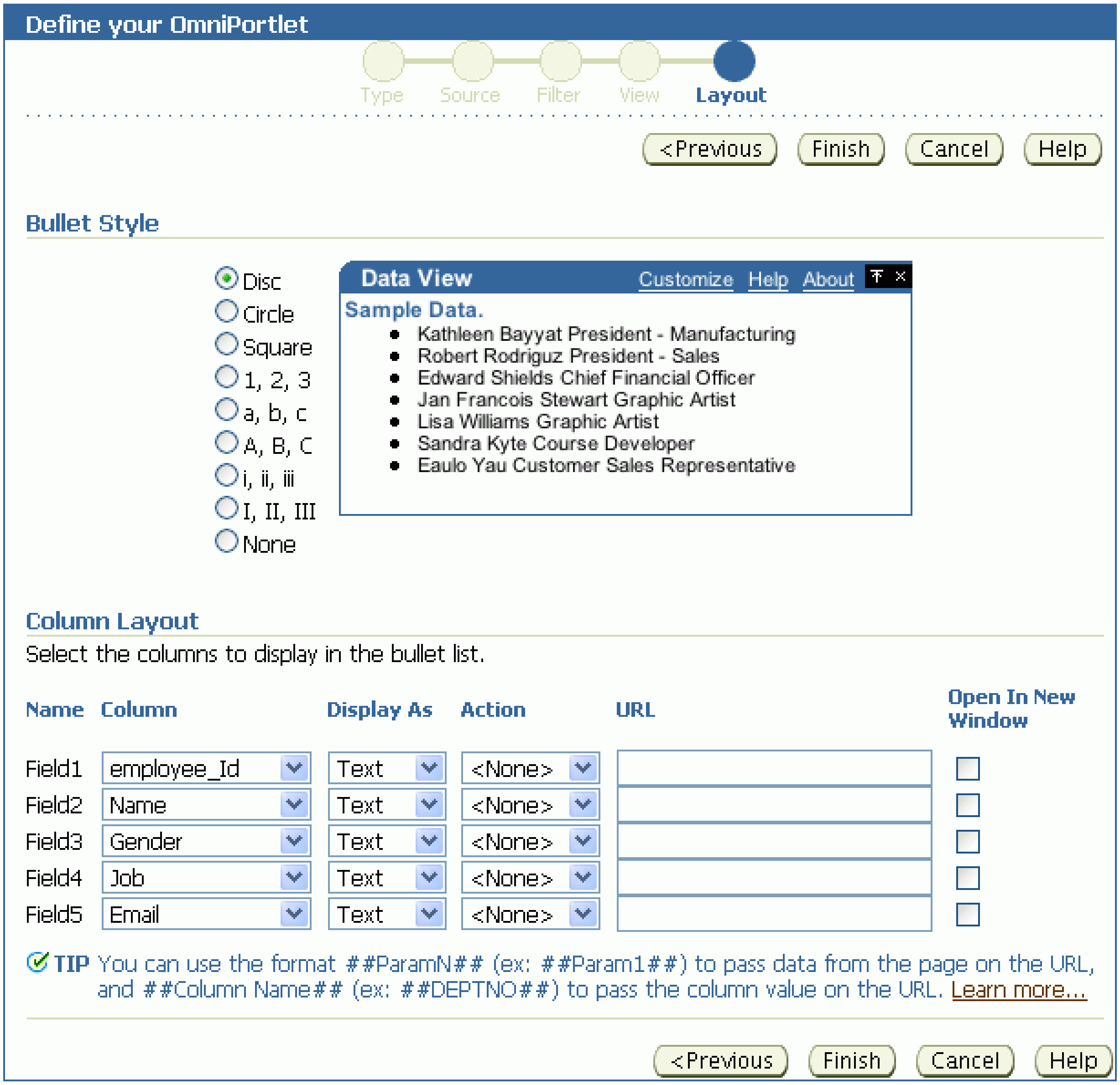
Figure 33–17 Example of an OmniPortlet Using a News Layout

Note: For more information about using the OmniPortlet wizard, click the **Help** link on the **Layout** tab.

33.2.7.4 Bullet Layout

Use the Bullet layout to display your data in a bulleted or numbered list. The **Layout** tab (Figure 33–18) provides a variety of different bullet and numbering styles.

Figure 33–18 Layout Tab: Bullet



In the **Column Layout** section, you can choose how the columns display in the portlet and associate a URL with column data.

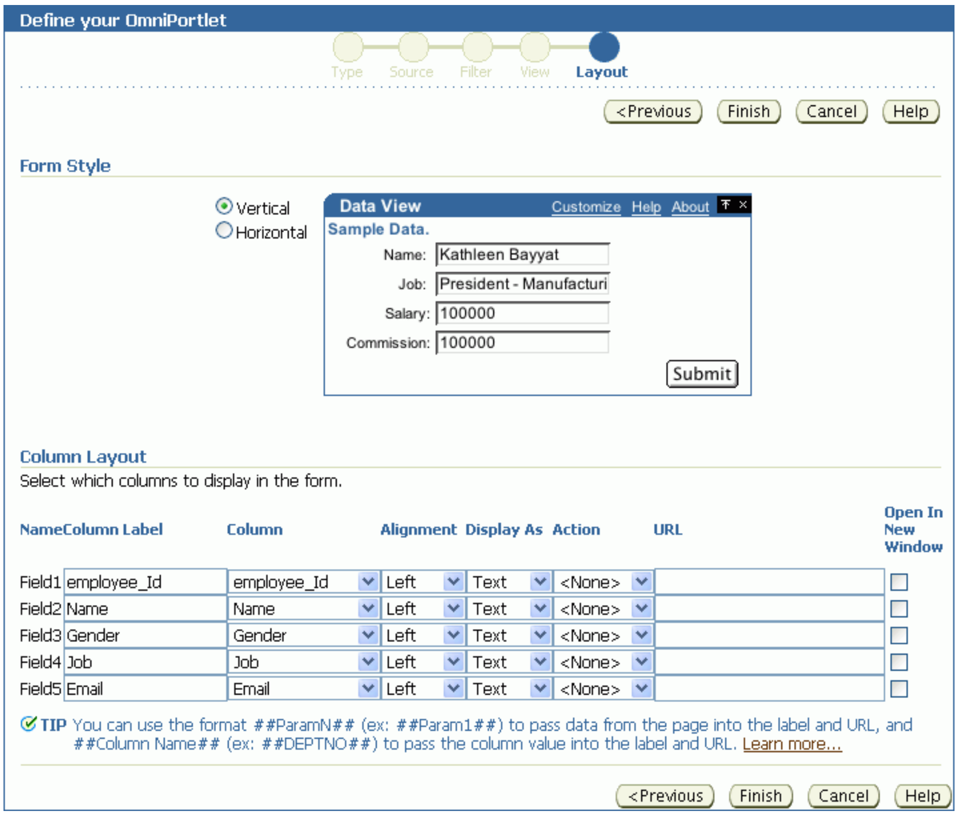
Figure 33–19 shows an example of an OmniPortlet using a Bullet layout.

Figure 33–19 Example of an OmniPortlet Using a Bullet Layout

Note: For more information about using the OmniPortlet wizard, click the **Help** link in the **Layout** tab.

33.2.7.5 Form Layout

Figure 33–20 Layout Tab: Form



Use the Form layout when you want to display source data in a form with labeled fields, such as Name: <name>. You can then use portlet parameters to determine the data that displays.

Use the **Column Label** column to enter row labels and the **Column** column to specify which column to use from your data source. Additionally, you can specify data alignment, select a display mode (text, HTML, image, button, field, or hidden), associate a URL or an event with the column data, and specify whether to open the URL target in a new window.

Figure 33–21 shows an example of an OmniPortlet using a Form layout.

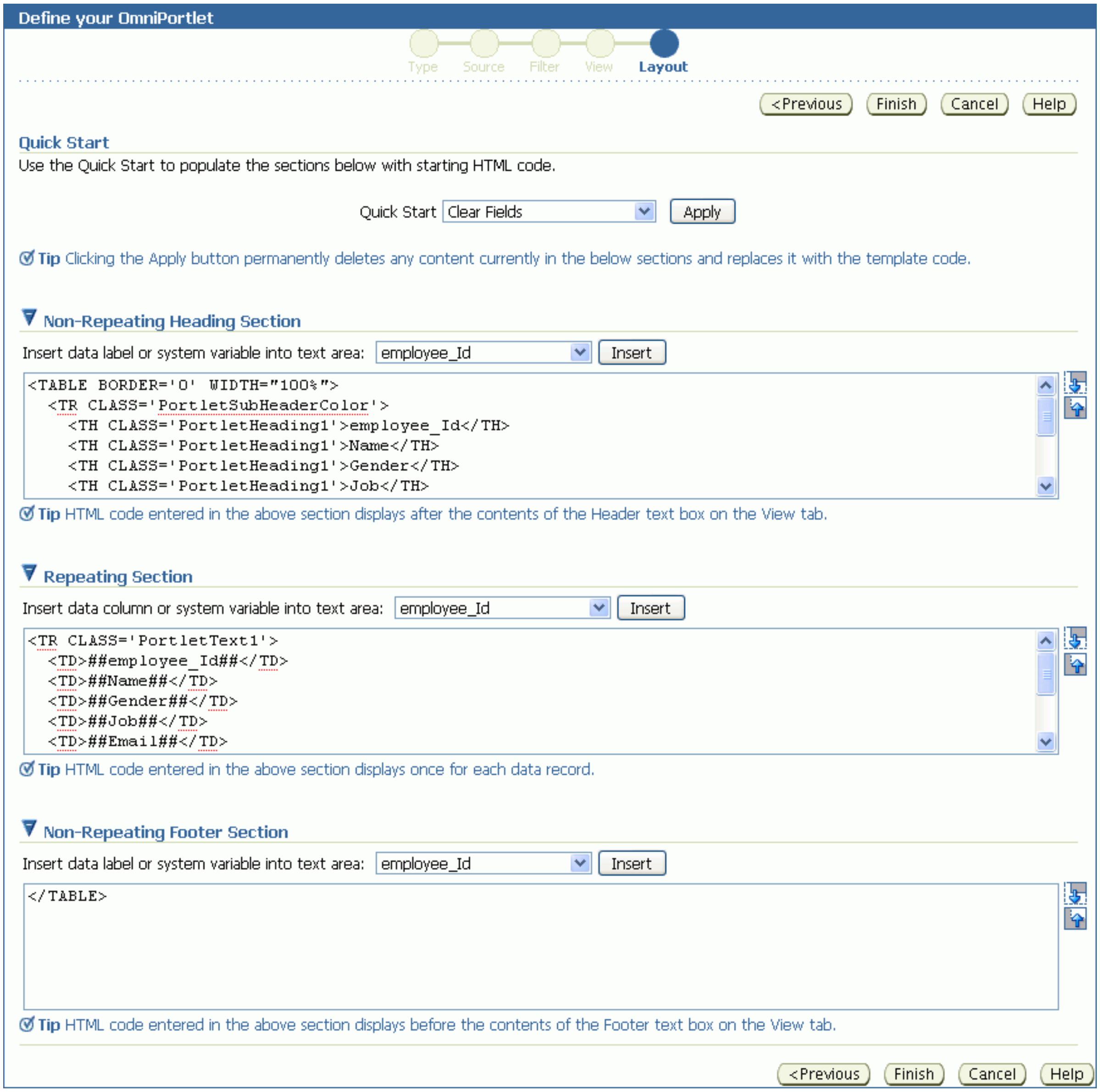
Figure 33–21 Example of an OmniPortlet Using a Form Layout

Note: For more information about using the OmniPortlet wizard, click the **Help** link in the upper right corner of the **Layout** tab.

33.2.7.6 HTML Layout

Use the HTML layout to create a customized look and feel for your OmniPortlet content. The **Layout** tab (Figure 33–22) provides a means of selecting a built-in HTML layout and modifying the code, or creating a new layout.

Figure 33–22 Layout Tab: HTML



You can hand-code your own HTML or JavaScript based on data columns that OmniPortlet has retrieved from the selected data source. By coding your own HTML and JavaScript, you have full control over the portlet's appearance, enabling you to develop a rich portlet interface.

For more information about using the fields on the **Layout** tab, click the **Help** button in the wizard. For an example of using JavaScript in the HTML layout, choose the **Sortable Table** layout from the **Quick Start** dropdown list on this tab.

Note: The maximum number of characters you can enter in each of the sections (Heading, Repeating, and Footer) is 30,000 (30k).

Figure 33–23 shows an example of an OmniPortlet using the HTML layout.

Figure 33–23 Example of an OmniPortlet Using the HTML Layout

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Emp ID	Name	Job	Email
20	Kathleen Bayyat	President - Manufacturing	kbayyat@mycompany.com
30	Robert Rodriguz	President - Sales	rrodrigu@mycompany.com
40	Edward Shields	Chief Financial Officer	eshields@mycompany.com
110	Jan Francois Stewart	Graphic Artist	jfrancoi@mycompany.com
100	Lisa Williams	Graphic Artist	lwilliam@mycompany.com
430	Sandra Kyte	Course Developer	skyte@mycompany.com
770	Eaulo Yau	Customer Sales Representative	eyau@mycompany.com

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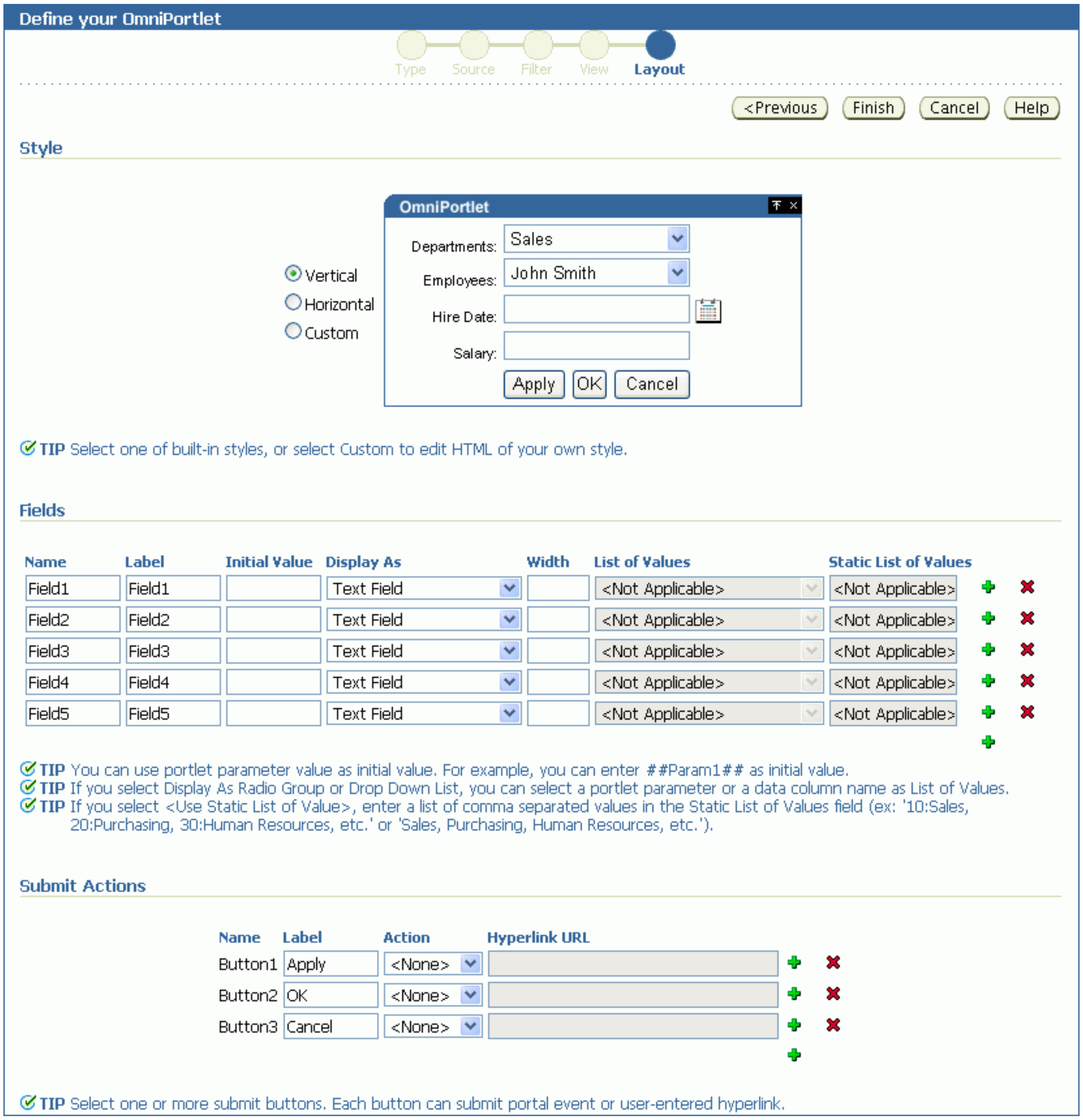
33.2.7.7 Parameter Form Layout

Use the Parameter Form layout to create a customized parameter form for your OmniPortlet content. The **Layout** tab (Figure 33–22) provides a means of selecting a built-in parameter form layout and modifying the code, or creating a new layout.

Figure 33–24 Layout Tab: Parameter Form



You can hand-code your own parameter form based on data columns that OmniPortlet has retrieved from the selected data source. By coding your own parameter form, you have full control over the portlet's appearance, enabling you to develop a rich portlet interface. To do so, choose the Custom style option, then use the Custom HTML field to edit the parameter form (Figure 33–25).

Figure 33–25 Layout Tab: Parameter Form Custom HTML Field

For more information about using the fields on the **Layout** tab, click the **Help** button in the wizard.

33.2.8 Customizing Your OmniPortlet

After you have created your OmniPortlet and returned to your application, you can select the **Customize** option from the portlet's **Actions** menu to revise your original selections. When you revise a defined OmniPortlet, tabs correspond to the different steps originally presented in the OmniPortlet wizard. An exception to this is the **Type** step—you cannot change the originally selected data type, and so there is no corresponding **Type** tab.

When you revise an OmniPortlet using customize mode, keep in mind the following notes:

- Any modifications you make to your portlet using customize mode apply to all users, regardless of the current session language and the locale of the user's browser.
- You can personalize the portlet at runtime by clicking the **Personalize** link on the portlet or by selecting the **Personalize** option on the portlet's **Action** menu. Personalizing the portlet creates a copy of the personalization object. As all properties are duplicated, subsequently modifying the portlet through Customize mode does not affect the personalized version of the portlet. To ensure the latest customizations are made to the portlet, after you make modifications in Customize mode, you must click **Personalize** again, and then select the **Reset to Defaults** option.
- The personalization of OmniPortlet is stored in a file-preference store. For more information about configuring OmniPortlet and modifying the preference store, see Appendix E, "Additional Portlet Configuration" in the *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter*.

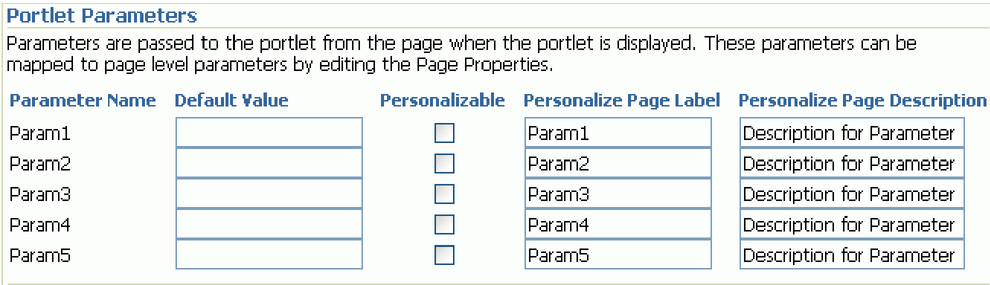
33.3 Working with OmniPortlet Parameters

You can define up to five portlet parameters for an OmniPortlet. You can define parameters in the following screens:

- On the **Source** screen of the wizard when you define the OmniPortlet
- On the **Source** tab when you select **Customize** for a defined OmniPortlet

Figure 33–26 shows the **Portlet Parameters** section on the **Source** tab.

Figure 33–26 Source Tab: Portlet Parameters Section



If you select any of these portlet parameters to be personalizable (by selecting the **Personalizable** check box), you can set their values on the Personalize screen.

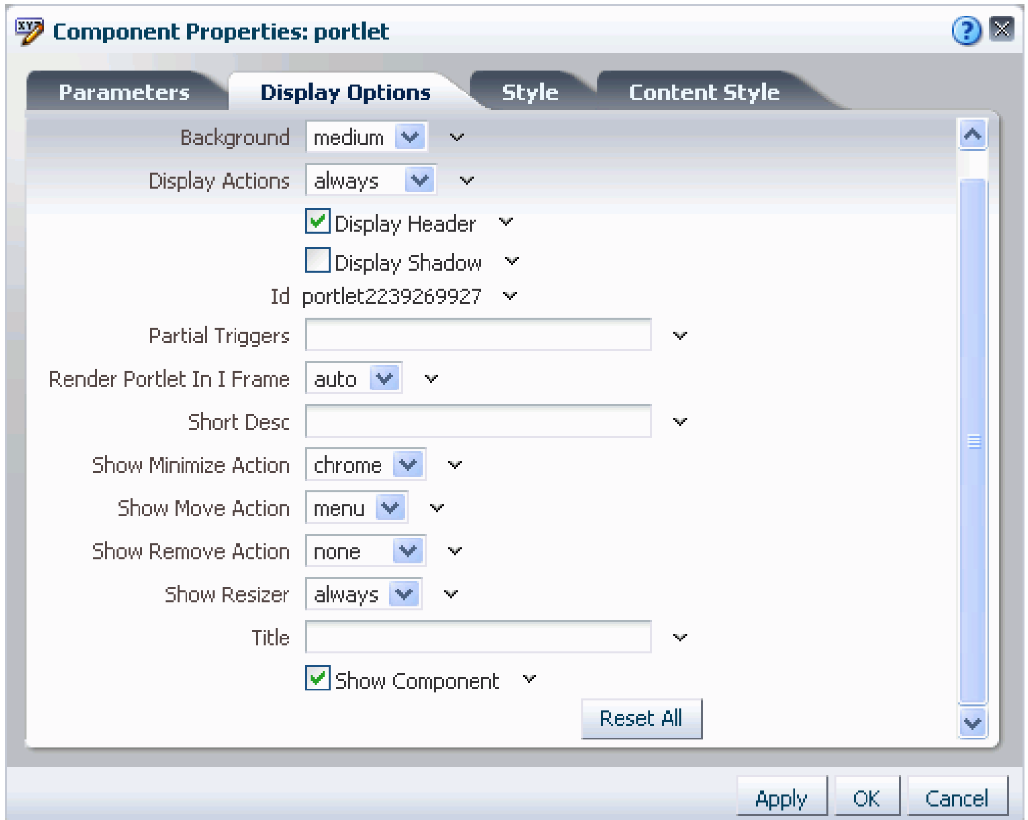
Note: You can learn more about portlet parameters in the online Help, which you can access by clicking the **Help** link on the **Source** tab in the OmniPortlet wizard. The online Help describes portlet parameters in detail, and how to set them up for your OmniPortlet.

Once you have set up portlet parameters in your OmniPortlet, you can contextually map the portlet to other portlets or components on a page. For more information about doing so, see Chapter 11, "Wiring Pages, Task Flows, Portlets, and UI Components."

33.4 Setting OmniPortlet Properties

OmniPortlet has associated properties that control the look and feel of the portlet on the page. Users with sufficient privileges can access these properties through the Component Properties dialog in Oracle Composer (Figure 33–27). Many component properties are common to all portlets, and the method for accessing properties is the same from portlet to portlet. Common component properties and how to access them are discussed in Section 10.4, "Setting Properties on Page Content."

Figure 33–27 OmniPortlet Component Properties



The properties on the **Parameters** tab of the Component Properties dialog control the default portlet content and facilitate the wiring of the portlet to page parameters and page definition variables. These properties are unique to the portlet. For more information, see Section 10.4.3, "Working with Component Parameters." For information about wiring pages and components, see Chapter 11, "Wiring Pages, Task Flows, Portlets, and UI Components."

Changes to the properties on the **Display Options**, **Style**, and **Content Style** tabs affect the appearance and behavior of the portlet for all users. For more information, see Section 10.4.4, "Working with Component Display Options" and Section 10.4.7, "Working with Style and Content Style Properties."

All properties on the **Parameters** and **Display Options** tabs provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the **Edit** icon next to a property field to open the editor. For more information about using the editor and for descriptions of common EL expressions, see Section 10.4.5, "Using Expression Language (EL) Expressions with Component Properties."

Table 33–3 describes the properties that are unique to OmniPortlet.

Table 33–3 OmniPortlet Component Properties

Property	Description	Location
`Param#`	Use to map page parameters to the parameters specified when the OmniPortlet was defined. These parameters enable you to contextually wire portlets and pages. For more information, see Chapter 11, "Wiring Pages, Task Flows, Portlets, and UI Components."	**Parameters** tab
`Id`	A unique identifier for the portlet instance.	**Display Options** tab
`Partial Triggers`	Use to initialize a partial page refresh, which is a way of refreshing an area of a page without having to redraw the entire page.	**Display Options** tab
`Render Portlet In I Frame`	Use to render the portlet in an inline frame (IFRAME), omit an IFRAME, or let the portlet decide. Valid values are: ■ `auto` (default): The portlet tag checks the portlet response and decides if an IFRAME is required ■ `true`: Render the portlet instance in an IFRAME ■ `false`: Render the portlet instance inline Placing a portlet inline on a page provides a better user experience as compared to placing it in an IFRAME. However, at times, it may be required to include a portlet in an IFRAME. For example: ■ The portlet is a JSF portlet ■ The portlet contains a file upload element ■ The parser throws an exception because it is not able to parse the markup	**Display Options** tab
`Title`	Enter a title for the OmniPortlet, to display in the portlet header.	**Display Options** tab

33.5 Troubleshooting OmniPortlet

This section provides information to help you troubleshoot problems you may encounter while using OmniPortlet.

Cannot Define OmniPortlet Using the Customize Link

You are not able to define the OmniPortlet at runtime by using the **Customize** link.

Problem

OmniPortlet only supports a `RenderPortletInIFrame` value of `true`, which means that OmniPortlet must be rendered within an IFRAME and therefore, the OmniPortlet property, `RenderPortletInIFrame`, must be set to `true`. At design time, the `RenderPortletInIFrame` property is available in the Property Inspector under Display Options. At runtime, the **RenderPortletInIFrame** property is available on the **Properties** panel in Oracle Composer.

Solution

Currently, the `RenderPortletInIFrame` property has a value of `false` and, consequently, when you click the **Define** link at runtime, the **Type** tab may not display and you cannot proceed with defining the OmniPortlet.

You can choose **Customize** from the **Action** menu to define OmniPortlet, or, for custom WebCenter applications at design time, select the OmniPortlet in the **Structure** window in Oracle JDeveloper, and in the Property Inspector, set `RenderPortletInIFrame` to `true`.

34

Working with the Web Clipping Portlet

This chapter provides a brief description of the Web Clipping portlet and producer and explains how you can register a Web Clipping producer and use this producer to add a Web Clipping portlet to a JSP document created through Oracle JDeveloper.

This chapter includes the following sections:

34.1 What You Should Know About Web Clipping

Web Clipping is a publishing portlet that enables you to integrate any web application with your custom WebCenter application and with WebCenter Spaces. It is designed to give you quick integration by leveraging the existing user interface of the web application. With Web Clipping, you can consolidate content from web sites scattered throughout a large organization.

With Web Clipping, you can clip an entire web page, or a portion of it, and reuse it as a portlet. You can clip basic and HTML-form-based sites. Use Web Clipping when you want to copy content from an existing web page and expose it in your WebCenter application as a portlet.

Web Clipping supports the following features:

- **Navigation through various styles of login mechanisms**

  Web Clipping supports various login mechanisms including form- and JavaScript-based submission and HTTP Basic and Digest Authentication with cookie-based session management.

- **Fuzzy matching of clippings**

  Fuzzy matching enables the Web Clipping engine to correctly identify a web clipping and deliver it as portlet content even if the web clipping is reordered within the source page or if its character font, size, or style changes.

- **Personalization**

  Personalization enables you to expose input parameters that end users can modify when they personalize the portlet. Parameters can be exposed as public parameters that you can map as page parameters. This feature enables end users to obtain personalized clippings.

- **Integrated authenticated web content through single sign-on**

  You can use external applications and leverage Oracle Single Sign-On to clip content from authenticated external web sites.

- **Inline rendering**

  Inline rendering enables you to set up Web Clipping portlets to display links within the context of the portlet. When a user clicks a link in the Web Clipping portlet, the results display within the same portlet. You can use this feature with internal and external web sites.

- **Proxy authentication**

  Web Clipping supports proxy authentication, including global proxy authentication and authentication for each user. You can use this feature if proxy servers require authentication. You can specify proxy server authentication details, including type (Basic or Digest) and realm in the `provider.xml` file. In addition, you can specify a scheme for entering user credentials as follows:

  – All users automatically log in using a user name and password that you provide.

  – All users are required to log in using a user name and password that they provide.

  – All public users (not authenticated into the WebCenter application) automatically log in using a user name and password that you provide, while valid users (authenticated into the WebCenter application) log in using a user name and password that they provide.

  For more information, see the "HTTP or HTTPS Proxy Configuration" section in the *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter*.

- **Support for HTTPS**

  Web Clipping enables you to clip content from HTTPS-based external web sites if appropriate server certificates are acquired.

- **Open Transport API**

  By default, the Web Clipping provider supports only HTTP challenge-based authentication methods, such as Basic and Digest and form submission logins. To support custom authentication methods, such as Kerberos proxy authentication, you can use the Web Clipping Transport API. For more information, see the "Using Web Clipping Open Transport API" section in the *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter*.

- **Reuse of a wide range of web content**

  Web Clipping provides basic support of pages written with JavaScript, applets, and plug-in enabled content, retrieved through HTTP GET and POST methods of form submission.

  Web Clipping also supports clipping of content from pages written with HTML 4.01, including:

  – Clipping of `<applet>, <body>, <div>, <embed>, <img>, <object>, <ol>, <span>, <table>`, and `<ul>` tagged content

  – Preservation of `<head>` styles and fonts, and CSS

  - Support for UTF-8 compliant character sets
  - Navigation through hyperlinks (HTTP GET), form submissions (HTTP POST), frames, and URL redirection

- **Globalization support**

  Web Clipping provides globalization support in URLs and URL parameters. For information about how Web Clipping determines the character set of clipped content, see Section 34.4, "Current Limitations of Web Clipping."

- **Persistent storage of Web Clipping definitions**

  Web Clipping definitions are stored persistently in a repository. For information about Web Clipping repository, see the "Web Clipping Portlet Configuration Tips" section in the *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter*.

- **Encryption of secure information**

  Any secure information, such as passwords, is stored in an encrypted form, according to the Data Encryption Standard (DES), using Oracle encryption technology.

34.2 Working with the Web Clipping Portlet

This section describes how to clip content for a Web Clipping portlet and make the portlet personalizable. It includes the following subsections:

- Section 34.2.1, "Adding a Web Clipping Portlet to a Page"
- Section 34.2.2, "Clipping Content for Display in the Web Clipping Portlet"
- Section 34.2.3, "Adding a Web Clipping That Users Can Personalize"

34.2.1 Adding a Web Clipping Portlet to a Page

The steps for adding a Web Clipping portlet to a page vary between a custom WebCenter application and the WebCenter Spaces application. For one thing, in a custom WebCenter application adding a portlet to a page is a design-time activity, carried out by the application developer. For information about adding a portlet to a page in a custom WebCenter application, see the "Creating Content-Based Portlets with Web Clipping" chapter in the *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter*.

In WebCenter Spaces, portlets are added to pages at runtime—when you run the application. Portlets are available for dragging and dropping from the Oracle Composer Catalog by any user with sufficient privileges. For information about adding a portlet to a page in WebCenter Spaces, see Section 10.1.5, "Adding Portlets to a Page."

> **Note:** In WebCenter Spaces, avoid adding a portlet to a Movable Box layout component (For information, see Chapter 9, "Working with Page Layout Components"). The Movable Box layout component duplicates the `showDetailFrame` that the portlet provides by default. Adding a portlet to a Movable Box creates an unnecessary and potentially error-prone redundancy.

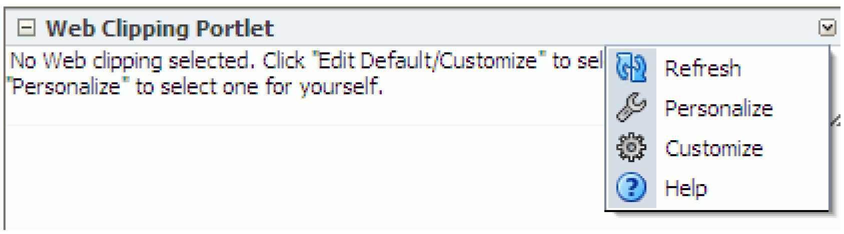
34.2.2 Clipping Content for Display in the Web Clipping Portlet

Though the point at which you add a Web Clipping portlet to a page varies between custom applications and WebCenter Spaces—at design time or at runtime—Web Clipping content is defined at runtime for both scenarios.

Run your application, and select either **Customize** or **Personalize** from the portlet's **Actions** menu (Figure 34–1) to start the process of clipping and saving web content. You can select:

- **Customize**, to set up a Web Clipping portlet to display content to all users
- **Personalize**, to set up your own, personal view of a Web Clipping portlet

Figure 34–1 Actions Menu on a Web Clipping Portlet in a Custom Application



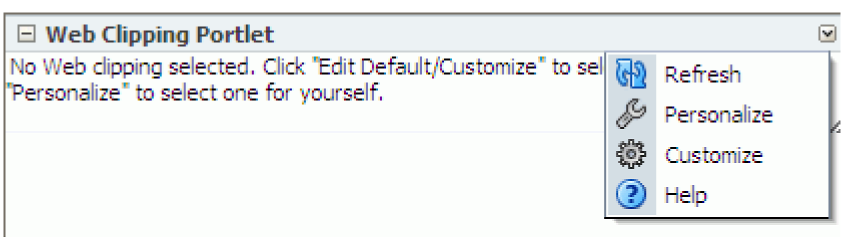
Both the **Customize** and **Personalize** options take you into Web Clipping Studio, where you can:

- Browse for web content
- Choose the exact portion of the web content to clip
- Preview the clipped content as a portlet
- Save the clipped content as a portlet
- Set portlet properties and save the updated portlet information

To clip web content for display in the Web Clipping portlet:

1. From the **Actions** menu on the header of the Web Clipping portlet (Figure 34–2), select either Customize or Personalize.

Figure 34–2 Actions Menu on a Web Clipping Portlet in a Custom Application



The **Find a Web clipping** page opens (Figure 34–3).

Figure 34–3 The Find a Web Clipping Page

Note: When running a portlet that has an Edit mode, the **Personalize** option on the portlet's **Actions** menu appears only to authenticated users. Unauthenticated or public users do not see the **Personalize** option. What this means is that, for personalization to work, some form of security must be implemented for your application.

If you are a developer creating portlets and pages, then you may want a quick way to test the Edit mode of your portlet without creating a complete security model for your application. For information about how you can quickly add the necessary security for testing portlet personalization, see the "Configuring Basic Authentication for Testing Portlet Personalization" section in the *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter*.

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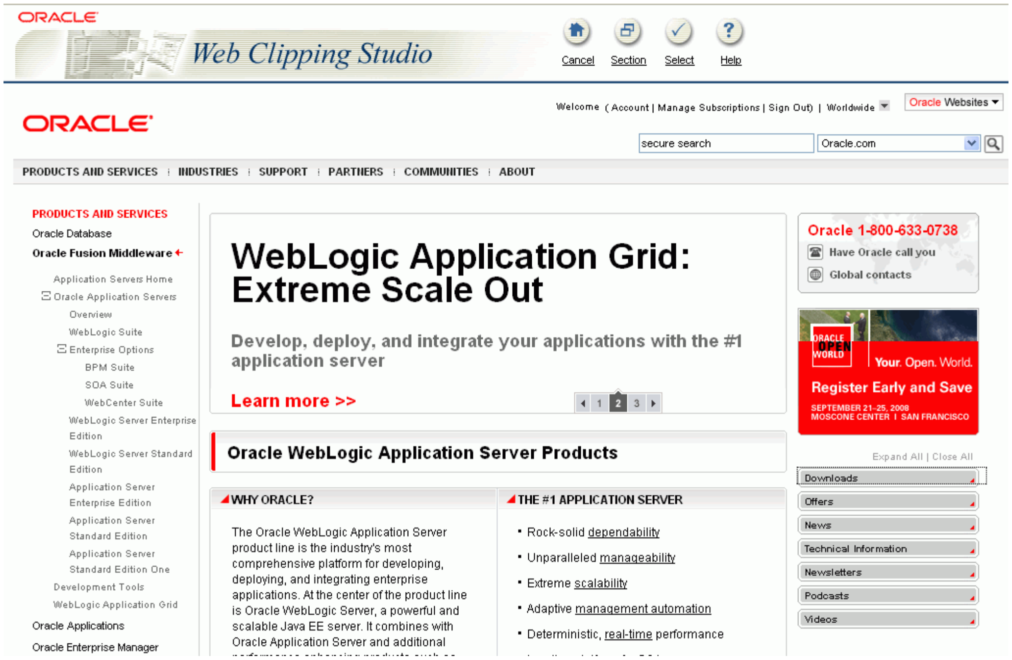
2. In the **URL Location** field, enter the URL of the web page that contains or links to the content you want to clip.
3. Click **Start**.

   Web Clipping Studio displays the page you specified (Figure 34–4).

Note: You can clip Secure Socket Layer (SSL)-enabled web sites if certificates of those sites are added to the certificate store. Certificates of SSL-enabled web sites that use Equifax, VeriSign, or Cybertrust certificates are included in the default certificate store.

For information about adding certificates, see the "Adding Certificates for Trusted Sites" section in the *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter*.

Figure 34–4 A Web Page Displayed in Web Clipping Studio



4. If your starting web page is not the page you plan to clip, then within Web Clipping Studio browse to the content you want to clip.

   As you click hyperlinks in the web page, Web Clipping Studio records your navigation links.

   Notes: Only the significant browsing operations are recorded for later playback during the show mode. Any browsing operations that do not contribute to the eventual web clipping are discarded. Discarded links are not visited.

   For any web sites that require HTTP Basic or Digest Authentication, a form is displayed that requests user name and password information. This encoded authentication information is recorded as part of the browsing information.

   ---

5. On the page that contains the content you want to clip, click the **Section** icon or link on the Web Clipping Studio banner (Figure 34–5).

   If you intend to clip the full web page, it is not necessary to section the page. You can clip the full page by clicking the **Select** icon or link instead of **Section** when you are on a page you want to clip.

Figure 34–5 The Section Icon and Link in the Web Clipping Studio Banner

Sectioning divides the target web page into its clippable sections (Figure 34–6).

Figure 34–6 Sectioned Web Page in Web Clipping Studio

After you click **Section**, you cannot browse links in the displayed page. If you want to browse to other locations through page links, then click **Unsection** on the Web Clipping Studio banner. For more information about using Web Clipping, you can click the **Help** icon or link on any of the Web Clipping pages.

Note: To adjust sectioning to encompass smaller or larger areas on the web page, use the **Section Smaller** and **Section Larger** options on the Web Clipping Studio banner. Click **Section Smaller** to divide the web page into more, smaller sections. For example, click **Section Smaller** to drill down one level of nested tables. Click **Section Larger** to divide the web page into fewer, larger sections.

---

6. At the top-left corner of the section you want to clip, click **Choose**.

   You can choose only one section at a time. Web Clipping Studio displays a preview of your chosen section.

7. If the displayed section is the clipping you want, then click **Select** on the Web Clipping Studio banner.

   If the displayed section is not the clipping you want, then click **Unselect** to return to the page containing the section. You can choose another section on the page, or click **Unsection** to remove sectioning, enabling you to navigate to another page.

Note: Some sections may contain no data, only whitespace. For example, a web page may contain an HTML `<DIV>` tag that contains no text or images. If you click **Choose** on a section that contains no data, then Web Clipping displays a preview, but the preview correctly shows only whitespace. In this case, click **Unselect** on the preview page to return to the sectioned page. Then, select a section containing data.

Once you have made your selection, the Web Clipping Studio displays the **Find a Web clipping** page with the selected web clipping's properties.

8. Adjust the clipping's property values as necessary:

   - **URL Rewriting—**Controls the behavior of links embedded in the clipped content.

     Select from:

     – **None—**To specify that link targets display on a new browser tab.

     – **Inline—**To specify that link targets display inside the portlet. If you have integrated with an external application or are logged into the clipped site, and if you choose **Inline** for URL Rewriting, then the session is maintained to the clipped site while browsing.

     Note: The **URL Rewriting** option is available only when you customize a portlet. This option is not available when you personalize a portlet.

   - **Title—**A title to display in the portlet header.
   - **Description—**A description of the clipping. The description is not displayed in the portlet.
   - **Time Out (seconds)—**The number of seconds to allow for the portlet to render before it times out.
   - **Expires (minutes)—**The number of minutes before cached portlet content expires. Once cached content expires, the next time the portlet is refreshed—either by a browser refresh or by clicking the **Refresh** link in the portlet itself—portlet content is retrieved from the web page from which the clipping originated.
   - **Parameterize Inputs—**Options for customizing parameters associated with the clipped content.

     Click the **Click to start parameterizing** checkbox to customize parameters associated with the content, and then perform the following steps:

     a. From the **Parameters** list, choose the parameters you intend to customize.

     b. From the **Personalizable** list, select a parameter if you intend to enable users to provide their own parameter values when they personalize the portlet. Select **None** if you do not want to allow this.

     c. In the **Display Name** field, enter a name to be displayed for the parameter.

     d. In the **Default Value** field, enter a default value for the parameter.

     For an example of personalizing the parameters of a web clipping, see Section 34.2.3.2, "Parameterizing a Web Clipping Portlet."

     Note: The **Parameterize Inputs** section displays only if you entered information in a form and then selected the section including the form for your web clipping.

     ---

9. Click **OK** to save changes to property values and to display the selected clipping in the Web Clipping portlet on your page.

Note: Web Clipping portlets support additional properties that influence the way the portlet is rendered. For information, see Section 34.3, "Setting Web Clipping Portlet Properties."

Figure 34–7 shows the selected web clipping in your Web Clipping portlet.

Figure 34–7 Clipped Content in a Web Clipping Portlet

Note: The **Refresh** link in the Web Clipping portlet retrieves data from cache or from the originating web site, depending upon the value you provided for **Expires (minutes)**.

34.2.3 Adding a Web Clipping That Users Can Personalize

This section walks you through a demonstration of how you can enable end users to personalize their own view of the content in a Web Clipping portlet. It includes the following subsections:

- Section 34.2.3.1, "Selecting a Clipping from OTN"
- Section 34.2.3.2, "Parameterizing a Web Clipping Portlet"
- Section 34.2.3.3, "Personalizing a Web Clipping Portlet"

34.2.3.1 Selecting a Clipping from OTN

In this task, you navigate to the Oracle Technology Network (OTN) and search for specific information to clip.

To select a clipping from OTN:

1. From the **Actions** menu on the portlet header, select **Customize**.

   The **Find a Web clipping** page opens.

2. In the **URL Location** field, enter the following URL, and click **Start**:

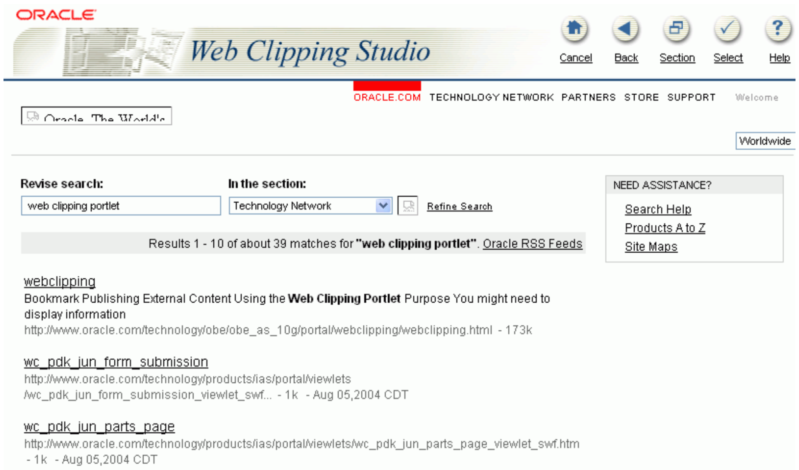
   ```
   http://www.oracle.com/technology/products/ias/portal/index.html
   ```

   OTN displays the Portal page.

3. Enter a search string in the Search field at the top of the page. For this example, enter `web clipping portlet`, then click the Search icon.

   Results display in Web Clipping Studio (Figure 34–8).

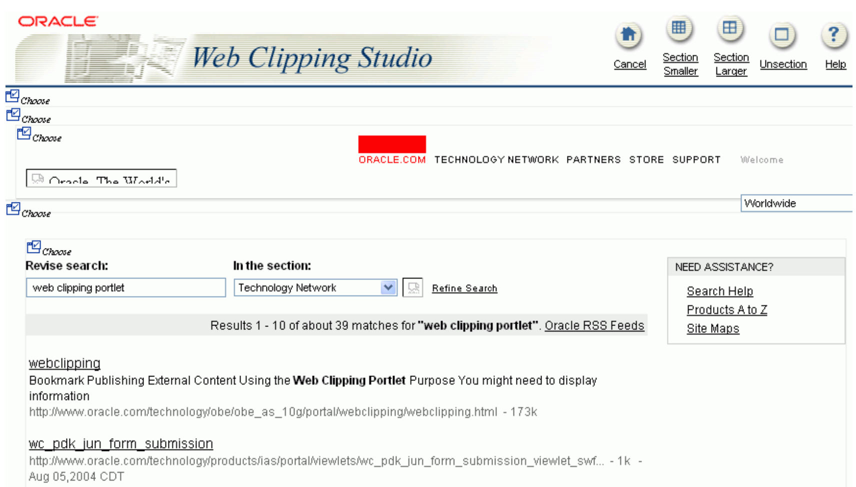
Figure 34–8 OTN Search Results in Web Clipping Studio



4. Click **Section** on the Web Clipping Studio banner.

   Web Clipping Studio divides the target web page into clippable sections (Figure 34–9).

Figure 34–9 The Choose Links on an OTN Search Results Page in Web Clipping Studio



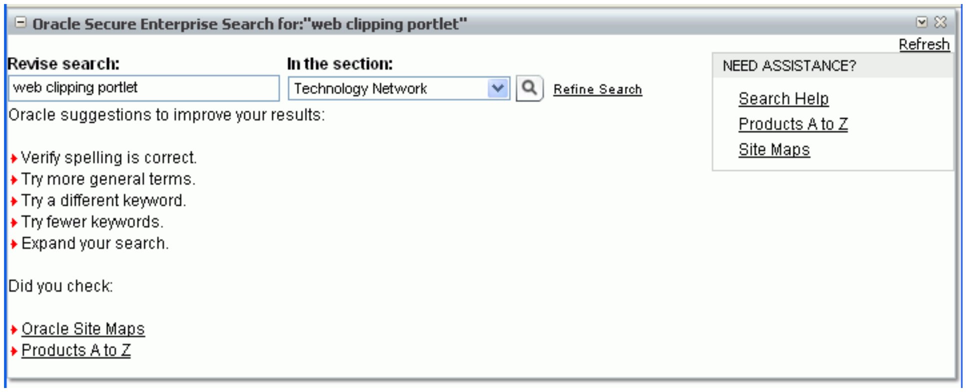
5. At the top-left corner of the area that contains the search results (just above the text Revise search), click **Choose**.

   A preview of the search result section opens.

6. Click **Select** to confirm that the search result section is the one you want to clip.

7. On the **Find a Web clipping** page, click **OK** to display the clipped content in the Web Clipping portlet (Figure 34–10).

Figure 34–10 Clipped Content Displayed in Web Clipping Portlet



34.2.3.2 Parameterizing a Web Clipping Portlet

In this task, you edit the properties of the Web Clipping portlet to enable users to display different search results in the portlet.

To parameterize a Web Clipping portlet:

1. Once you have clipped the OTN search results as described in Section 34.2.3.1, "Selecting a Clipping from OTN," select **Customize** from the Web Clipping portlet's **Actions** menu.

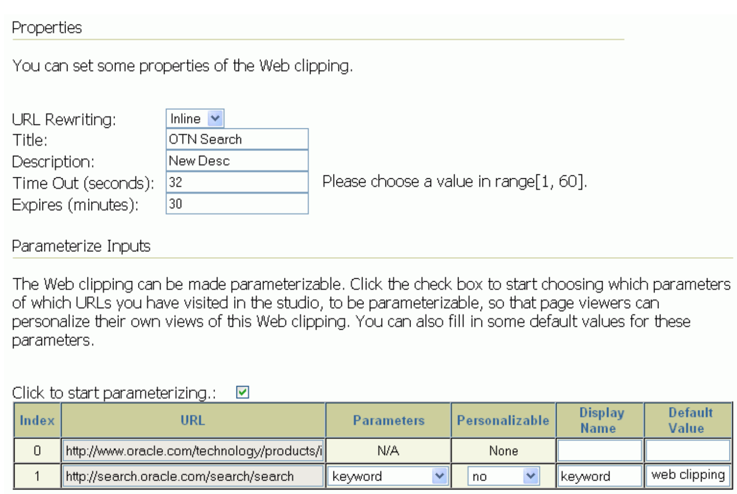
2. In the **Find a Web clipping** page, modify the following items in the **Properties** section:

   - From the **URL Rewriting** dropdown list, choose **Inline** to specify that link targets open inside the portlet, rather than in a new browser window.

   - In the **Title** field, enter `OTN Search`. This title appears in the header of your Web Clipping portlet and on the pages where users can personalize parameters for the web clipping.

   Figure 34–11 shows the **Properties** and **Parameterize Inputs** sections of the **Find a Web clipping** page.

Figure 34–11 Web Clipping Properties



3. Because the content displayed in the portlet was reached by entering information in the **Search** field on OTN, you can customize the parameters used by the search to enable users to specify their own search string.
4. Under the **Parameterize Inputs** section, select **Click to start parameterizing**, and make the following changes in the parameters table:
   - In the **Parameters** column, select **keyword** from the dropdown list.
   - In the **Personalizable** column, select **Param1** from the dropdown list.
   - In the **Display Name** column, enter `OTN Search`.
   - Make sure that **Default Value** displays **web clipping portlet** to be sure you have selected the right parameter.
5. Click **OK** to display the default search results in the Web Clipping portlet.

34.2.3.3 Personalizing a Web Clipping Portlet

In this task, you personalize a Web Clipping portlet to display different search results in the portlet.

To personalize a Web Clipping portlet to display different search results:

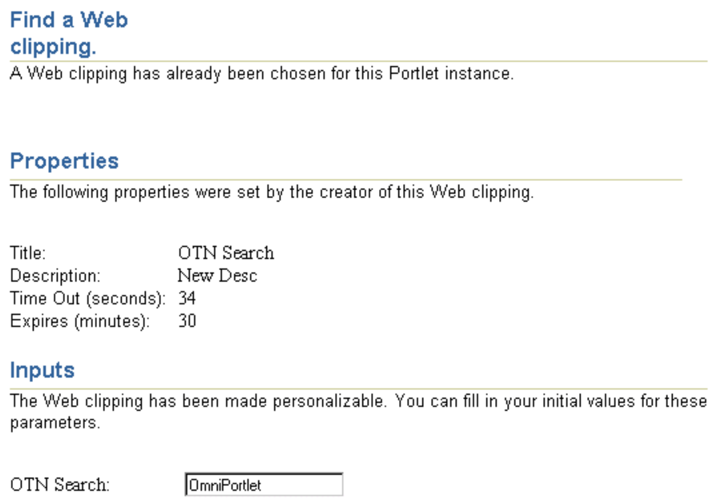
1. Select **Personalize** from the **Actions** menu on the Web Clipping header.

> **Note:** When running a portlet that has an Edit mode, the **Personalize** option on the portlet's **Actions** menu appears only to authenticated users. Unauthenticated or public users do not see the Personalize option. What this means is that, for personalization to work, some form of security must be implemented for your application.
>
> If you are a developer creating portlets and pages, then you may want a quick way to test the Edit mode of your portlet without creating a complete security model for your application. For information about how you can quickly add the necessary security for testing portlet personalization, see the "Configuring Basic Authentication for Testing Portlet Personalization" section in the *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter*.

2. In the resulting **Find a Web clipping** page, scroll down to the **Inputs** section.

   Notice that the parameter field for the search string is labeled **OTN Search,** as you specified for the **Display Name** while parameterizing the Web Clipping portlet. (Figure 34–12).

Figure 34–12 A Web Clipping in the Personalize Mode



3. In the **OTN Search** field, enter a different search string.

   For example, enter `WebCenter`.

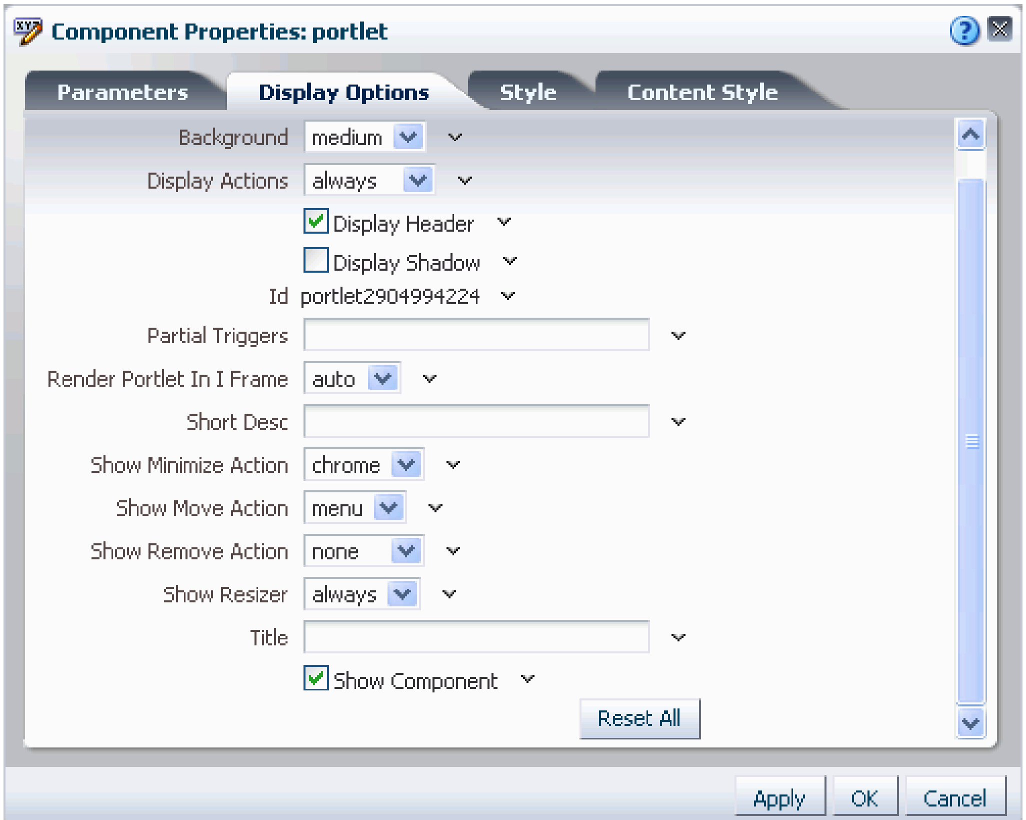
4. Click **OK**.

   The Web Clipping portlet now displays the search results for `WebCenter` from OTN.

34.3 Setting Web Clipping Portlet Properties

The Web Clipping portlet has associated properties that control the look and feel of the portlet on the page. Users with sufficient privileges can access these properties through the Component Properties dialog (Figure 34–13). Many component properties are common to all portlets, and the method for accessing properties is the same from portlet to portlet. Common component properties and how to access them are discussed in Section 10.4, "Setting Properties on Page Content."

Figure 34–13 Web Clipping Portlet Component Properties



The properties on the **Parameters** tab of the Component Properties dialog control the default portlet content and facilitate the wiring of the portlet to page parameters and page definition variables. These properties are unique to the portlet. For more information, see Section 10.4.3, "Working with Component Parameters." For information about wiring pages and components, see Chapter 11, "Wiring Pages, Task Flows, Portlets, and UI Components."

Changes to the properties on the **Display Options**, **Style**, and **Content Style** tabs affect the appearance and behavior of the portlet for all users. For more information, see Section 10.4.4, "Working with Component Display Options" and Section 10.4.7, "Working with Style and Content Style Properties."

All properties on the **Parameters** and **Display Options** tabs provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the **Edit** icon next to a property field to open the editor. For more information about using the editor and for descriptions of common EL expressions, see Section 10.4.5, "Using Expression Language (EL) Expressions with Component Properties."

Table 34–1 describes the properties that are unique to the Web Clipping portlet.

Table 34–1 Web Clipping Portlet Component Properties

Property	Description	Location
`Param#`	Use to map page parameters to the parameters specified when the Web Clipping portlet was defined. These parameters enable you to contextually wire portlets and pages. For more information, see Chapter 11, "Wiring Pages, Task Flows, Portlets, and UI Components."	**Parameters** tab
`Id`	A unique identifier for the portlet instance.	**Display Options** tab
`Partial Triggers`	Use to initialize a partial page refresh, which is a way of refreshing an area of a page without having to redraw the entire page.	**Display Options** tab
`Render Portlet in I Frame`	Use to render the portlet in an inline frame (IFRAME), omit an IFRAME, or let the portlet decide. Valid values are: ■ `auto` (default): The portlet tag checks the portlet response and decides if an IFRAME is required ■ `true`: Render the portlet instance in an IFRAME ■ `false`: Render the portlet instance inline Placing a portlet inline on a page provides a better user experience as compared to placing it in an IFRAME. However, at times, it may be required to include a portlet in an IFRAME. For example: ■ The portlet is a JSF portlet ■ The portlet contains a file upload element ■ The parser throws an exception because it is not able to parse the markup	**Display Options** tab
`Title`	Enter a title for the Web Clipping portlet, to display in the portlet header.	**Display Options** tab

34.4 Current Limitations of Web Clipping

When you use Web Clipping, you should be aware of the following limitations.

- If the site that you intend to clip uses a large amount of JavaScript to manipulate cookies or uses the `document.write` JavaScript method to modify the HTML document being written, then you may not be able to clip content from the site.
- When you integrate with partner applications (by using `mod_osso`), you cannot clip directly through those partner applications in an authenticated manner. However, you can use partner applications through the external application framework.
- You cannot use the Web Clipping portlet to clip Oracle Portal pages and ADF pages. As a workaround, reregister the same producer in the destination portal and edit the portal manually.
- You cannot use the Web Clipping portlet to clip a web page that contains multiple frames, that is, a frameset.
- Note the following about Web Clipping and the use of a CSS:
  - If a web page contains multiple portlets that use a CSS, then they should not conflict if the CSS uses distinct style names, such as `OraRef`, to specify a style within an HTML tag, rather than using an HTML tag name, such as `<A>`, as the name of the style.

- If one portlet uses a CSS, and that CSS overwrites the behavior of HTML tags by using the name of the tag, such as `<A>`, as the name of the style, and a second portlet on the same page does not use a CSS, the second portlet is affected by the style instructions of the CSS of the first portlet.
- If two portlets on the same page use a different CSS and each CSS overwrites the behavior of HTML tags by using the name of an HTML tag, such as `<A>`, as the name of the style, then the style that is displayed depends on the browser.

- Web Clipping checks for globalization support settings in the following way:
  1. Web Clipping checks the `Content-Type` in the HTTP header for the `charset` attribute. If this is present, then it assumes that this is the character encoding of the HTML page.
  2. If the `charset` attribute is not present, then Web Clipping checks the HTML `META` tag on the page to determine the character encoding.
  3. If the HTML `META` tag is not found, then Web Clipping uses the `charset` in the previous browsed page. If this is the first page, then it defaults to the ISO-8859-1 character encoding.
  4. If the value of the `charset` for `Content-Type` or `META` tag is not supported (for example, if the `charset` was specified as `NONE`), then Web Clipping uses the default character set, ISO-8859-1, not the `charset` in the previously browsed page.
- To use the Web Clipping portlet, you must use Microsoft Internet Explorer 5.5 or later for Windows 2000, or Microsoft Internet Explorer 6.0 or later for Windows XP. If you use browser versions older than these, then you may encounter JavaScript errors.

34.5 Troubleshooting Web Clipping

This section provides information to help you troubleshoot problems you may encounter while using Web Clipping.

Encountered "x" at line n, column n. Was expecting one of : "x", "y" ...

Parser error message written to the log file.

Problem

The web content displayed in the Web Clipping portlet contains invalid HTML or JavaScript.

Solution

This is a site-specific issue, not a Web Clipping error. Contact the site's administrator for assistance.

Glossary

About mode

A **portlet mode** that typically displays information such as copyright, version, and author of the portlet.

Activity Stream

In the **People Connections service**, a feature for viewing the application activities tracked for you and other users.

ADF

Application Development Framework. A range of technologies aimed at making **Java EE** application development faster and simpler for developers while at the same time taking advantage of proven software patterns to ensure that the developed application is scalable, performant, and the like.

administrator

In WebCenter Spaces there are two types of administrator:

- Fusion Middleware administrator: Also referred to as systems administrator. A user with complete administrative capabilities. This administrator can perform the complete range of security-sensitive administrative duties, and all installation, configuration, and audit tasks.
- WebCenter Spaces administrator: A WebCenter Spaces user who is responsible for customizing WebCenter Spaces out of the box, managing and granting application roles, and maintaining the application when it is in use.

Ajax

A combination of asynchronous JavaScript, dynamic HTML (DHTML), XML, and XmlHttpRequest communication channel that enables requests to be made to the server without fully re-rendering the page. Ajax enables rich client-like applications to use standard internet technologies.

Announcements service

A WebCenter service that offers a quick, convenient way to create and widely distribute messages instantly or at a specific time.

API

Application Programming Interface. A set of exposed data structures and functions that an application can use to invoke services on an application object, such as a **portlet**.

Application Development Framework

See **ADF**.

application lifecycle

The process of creating and testing an application in a design time environment, deploying it to a production system, and then performing routine maintenance, such as monitoring performance and migrating customization data. The lifecycle of an application also includes performing further enhancements, restaging, and then redeploying the application to the production system.

Application Programming Interface

See **API**.

application role

Roles that are specific to a particular application and are stored in an application-specific stripe of the policy store.

application skin

Specifies the WebCenter Spaces application background color, screen fonts, and, with some skins, the shapes and images used for application buttons and icons. The WebCenter Spaces administrator chooses the default application skin. WebCenter users may change the application skin on the General tab of the Preferences dialog.

Applications pane

An area of the WebCenter Spaces Sidebar that provides convenient access to your frequently used applications. See **Sidebar**.

authenticated user

A user who is logged into a **custom WebCenter application**. Credentials of this user are verified against the identity store. By default, an authenticated user can access public information. To access secured information, such as pages and **portlet**s, this user must be authorized through the policy and credential store.

Contrast with **public user**s, who are not logged in, and can access public content only.

authentication

Identification of a user through an identity management system. You can require ADF authentication to enforce credentials for users to access the WebCenter application only (all ADF resources in the application remain accessible), or authentication *and* authorization to enforce credentials for users to access the WebCenter application and any ADF resources that have been secured in the application.

authorization

The policies that define the access rights of an individual or group to a secured resource. This resource may be a page or component within a page.

authorized user

An individual who has access to a secured resource. For non-public resources, this individual is also an **authenticated user**.

Blog service

A WebCenter service for integrating blogs into WebCenter applications.

blog page

A page that provides a personal record of an individual user's experience and opinions. There are two kinds of blog: personal blogs are written by an individual; group blogs are written by several users.

Box layout component

An Oracle Composer layout component. A container that enables the placement of content on a WebCenter Spaces page. In Oracle Composer, a Box is rendered as a rectangle comprised of dashed lines. For designers of custom WebCenter applications, this is the runtime equivalent of a Panel Customizable component.

BPEL

Business Process Execution Language. An XML-based markup language for composing a set of discrete web services into an end-to-end process flow.

business role page

A page, created by the WebCenter Spaces administrator, specifically provided for a given role in an organization. Business role pages provide a targeted environment for users of a particular role by delivering information that is timely and relevant to individual roles without the noise of irrelevant information from other lines of business. Business role pages appear in the personal spaces of users classified under the specified role.

caching

The act of storing frequently accessed information, typically web pages, in a location where it can be accessed quickly to avoid frequent content generation.

See also **expiry-based caching** and **validation-based caching**.

calendar overlay

The ability to display multiple calendars in a single Events task flow.

Change Mode Button component

A component provided in the Oracle Composer tag library that enables users to change from page View mode to page Edit mode.

Change Mode Link component

A component provided in the Oracle Composer tag library that enables users to change from page View mode to page Edit mode.

check out/check in

A mechanism that enables a user to lock information, by checking it out, so that other users cannot modify that same piece of information. This prevents users from overwriting each other's changes. After making modifications, the user releases it by checking it back in, making it available again for other users to modify.

Child Components

The components contained within a parent component. For example, the task flows contained within a Box layout component are the child components of the Box.

See also **Box layout component** and **parent component**.

chrome

Visual elements surrounding a portlet or task flow that provide an access point for actions, such as those on the Actions menu and those embedded in the chrome itself, such as the minimize icon or resize handles.

Community of Interest group space

A **group space** created using the Community of Interest template. This type of group space provides an optimal structure for supporting communities of people, joining together to learn more about a subject area through the sharing of expertise, ideas, and content.

component

An individual piece of an application, for example, a task flow, portlet, page, or layout element such as a box or image.

Component Catalog

A dialog, accessed from Oracle Composer, that provides access to all the content you can add to a WebCenter application page.

component developer

The developer who builds components (such as portlets, **JavaServer Faces** components, and web services).

Component Properties

A dialog, accessed from Oracle Composer, that provides access to a component's parameters, display options, child components, style settings, and associated events.

Connections

In the **People Connections service**, a feature for establishing a social network with other application users.

container

An application program or subsystem in which the program building block, known as a **component**, is run.

content integration services

Services provided by **Oracle WebCenter** to enable developers to display content from a **content repository**, such as by creating **data control**s.

Content Presenter

A feature of the **Documents service** that enables end users to select and search content items and then display those items using available display templates. Oracle WebCenter provides out-of-the-box templates for displaying single and multiple content items on your pages. You can also define custom templates for the content that you want to display in your **custom WebCenter application**, or for selection by end users at runtime.

content repository

A specialized storage and management mechanism that provides such features as author-based versioning, full text searching, and content categorization and attribution. A content repository is optimized for storing unstructured information, which differentiates it from a data repository.

content repository data control

A **data control** sourced though a content repository. In a **custom WebCenter application**, you can create content repository data controls for the following content repositories: **Oracle Portal**, **Oracle Universal Content Management**, third-party repositories that support the Java Content Repository (JCR) standard, and your local file system.

credential provisioning page

A **JSF** (`*.jspx`) page used for authenticating to an **external application**. At runtime, the Credential Provisioning page displays login data fields consisting of the data fields specified through external application registration. Login information is passed to the producer, which in turn passes the login values to the external application. The application provides the producer with the requested portlets.

After authentication, the user's login credentials are preserved in a **credential store**, which subsequently supplies that information at future sessions. Unless his information changes, the user supplies his credentials only one time.

credential store

Provides storage for login credentials for its associated domain. It also preserves the login credentials that a user provides for authentication to an **external application**. Credential store is usually combined with the policy store as a single logical store.

Although the credentials stored in the credential store are used during subsequent logins for authentication, the main function of this store is to provide authorization for those accounts.

CSS

Cascading Style Sheet. A simple mechanism for ensuring a consistent look and feel or adding style, such as fonts, colors, and spacing, to web documents.

custom action

Icons or menu items rendered on the header or the Actions menu of a Show Detail Frame component surrounding a task flow. Custom actions can represent actions that were defined in the task flow when it was created. For example, at design time a developer can build a task flow with custom personalization settings. At runtime, users can access these settings through icons or Actions menu items provided in the task flow's surrounding chrome (or Show Detail Frame).

custom attribute

Specifies group space information in addition to that provided by the built-in attributes. Custom attributes can be used to determine the content of the components in a group space based on the parameter passed in. For example, a component can display data for a specific customer by passing in the customer ID. A custom attribute is simply a name value pair, for example customerId=400, orderId=11, userName=Smith, and so on. Custom attributes are stored within the group space template.

custom page

Any page created by a user rather than one provided out of the box.

custom resource catalog

A resource catalog that has been customized to control the components that are visible to specific users.

Contrast with **default resource catalog**.

custom role

A user role created by an administrator or a group space moderator to meet a specific personal space or group space requirement.

custom WebCenter application

A custom WebCenter application is built on top of the ADF using the **WebCenter Extension for Oracle JDeveloper**. This application combines web content, portlets, content integration, and collaborative services for the end user. Developers and administrators can create a custom WebCenter application based on their roles and skill levels in the organization. See **WebCenter application**.

Customize mode

A **portlet mode** that enables users to set the default values for portlet preferences for all users.

customizable component

A WebCenter component that can be added to a page at runtime to enable end users to perform personalizations such as move, minimize, restore, or remove on content within those components. Customizable components are the **Panel Customizable component** and the **Show Detail Frame component**.

customization

An update that affects all users.

Contrast with **personalization**.

data control

A mechanism that provides an abstraction of the business service's data model. The ADF data controls provide a consistent mechanism for clients and web application controllers to access data objects, collections, methods, and operations.

See also **content repository data control**.

default language (application-level)

A display language specified by the WebCenter Spaces administrator that is used when users log in to WebCenter Spaces. The WebCenter Spaces administrator sets the application-level default language on the **General** tab of the **Administration** page. Individual users can set their own user-level default language on the General tab of the Preferences dialog.

default language (user preference)

A user-specified display language that is rendered when the user logs in to WebCenter Spaces. This language selection lasts until the user specifies a different default language. It can be overridden by a session language, but returns as the default when the session cookie is purged or expires. This value is set on the **General** tab of the Preferences dialog.

default resource catalog

The resource catalog that is provided by default for an application. It contains all of the Oracle ADF components and portlets available to the application.

Contrast with **custom resource catalog**.

Default Server

See **Integrated WLS**.

deployment profile

A file used in application deployment that specifies the following types of information:

- The source files, deployment descriptors, and other auxiliary files that are packages
- The type and name of the archive file to be created
- Dependency information
- Platform-specific instructions
- Other information

WebCenter services provides a special deployment profile, the **custom WebCenter application** WAR deployment profile, that includes an option to export project metadata.

Design view (JDeveloper)

A view, in **Oracle JDeveloper**, that provides a WYSIWYG representation of a file.

See also **Source view (JDeveloper)**.

Design view (WebCenter Spaces)

A view, in **Oracle Composer**, that provides a WYSIWYG representation of a page and its components.

See also **Source view (WebCenter Spaces)**.

discoverable group space

A group space that can be found by anyone logged into WebCenter Spaces, for example through a search. A group space is made discoverable when the group space moderator enables the Discoverable setting. Discoverable group spaces are listed in My Group Spaces. Users wishing to join the group space can request membership through self-subscription (if enabled) or by contacting the group space moderator.

Discussions service

A WebCenter service that provides a means of creating and participating in text-based discussions with members of a particular group space.

display language

Controls the language in which application user interface elements, such as buttons, field labels, and screen text, are rendered in the browser. The order of precedence for WebCenter application display language settings from weakest to strongest is: browser setting, application setting, user preference setting, session setting, group space setting.

Document List Viewer task flow

A Documents service task flow that exposes a list of documents and, optionally, folders. The list is comprised of the contents of a specific folder or the results of a document search.

Document Manager task flow

A Documents service task flow that exposes all the folders and files available from the default content repository connection and default folder. Use to create, upload, and manage library content; to manage file versions; and to check files out and in.

Documents page

A predefined page provided in every WebCenter Spaces group and personal space that includes the **Document Manager task flow** for managing content.

Documents service

A WebCenter service that provides features for accessing, adding, and managing files; creating and managing file folders; configuring file and folder properties; and searching file and folder content.

The Documents service provides four task flows: Content Presenter, Document List Viewer, Document Manager, and Recent Documents.

domain

Any tree or subtree within the Domain Name System (DNS) namespace. Domain most commonly refers to a group of computers whose host names share a common suffix: the domain name.

dynamically-generated page

A page that displays as the result of a user action, such as a search or a click on a tag. As the name suggests, dynamically-generated pages are not stored, but rather are created as and when needed.

EAR

Enterprise Archive file. A **Java EE** archive file that is used in deploying applications on a **Java EE** application server. **custom WebCenter application**s are deployed using both a generic EAR file, which contains the applicaiton and the respective runtime customization, and a targeted EAR file, which contains only the application for deployment to the application server. EAR files simplify application deployment by reducing the possibility of errors when moving an application from development to test, and test to production.

See also **WAR**.

ECMA-262 specification

A standardization of scripting programming languages, such as **ECMAScript** and JavaScript.

ECMAScript

A scripting programming language, standardized by Ecma International according to the **ECMA-262 specification**. Frequently referred to as JavaScript or JScript, which are both extensions of the ECMA-262 specification.

Edit Defaults mode

(**JSR 168** portlets only.) A **portlet mode** that enables personalization of a JSR 168 portlet. Edit Defaults mode is a display mode for the JSR 168 portlet's properties. In a **custom WebCenter application**, the Edit Defaults mode displays on the portlet's Actions menu as the Customize command.

See also **Edit mode**.

Edit mode

A **portlet mode** that enables personalization of the portlet for each user, for each instance.

See also **Edit Defaults mode**.

edit mode

A view mode that enables users to modify the content, style, and layout of a page. Access edit mode by choosing Edit Page from the Page Actions menu.

EL

Expression Language. Provides a shorthand way of working with web application data by providing operators for retrieving and manipulating application data residing in a **Java EE** web container. In a **custom WebCenter application**, EL expressions are encapsulated in the characters "#{" and "}" and typically come in the form #{object.data} where *object* represents any Java object or **ADF** component placed in the **Java EE** web container's page, request, session, or application's scope.

Enterprise Archive file

See **EAR**.

enterprise mashup

An application that enables users to bring all sorts of content and services together in a single place.

Events service

A WebCenter service that provides group calendars, which you can use to schedule meetings, appointments, and so on. You can integrate the Events service with a Microsoft Exchange Server to provide personal calendars for individual users. This service is available only in WebCenter Spaces, and not in custom WebCenter applications.

expiry-based caching

A **caching** method that uses a retention period to specify how long the item is valid in the cache before a refresh is required. When there is a request for the item beyond the retention period, it is refreshed in the cache.

See also **validation-based caching**.

Expression Language

See **EL**.

external application

Applications that do not delegate authentication to the single sign-on server. Instead, they display HTML login forms that ask for application user names and passwords. At the first login, users can choose to have the single sign-on server retrieve these credentials for them. Thereafter, they are logged in to these applications transparently.

farm

A collection of components managed by Fusion Middleware Control. A farm can contain a Managed Server domain and other Oracle Fusion Middleware system components that are installed, configured, and running on the domain.

favorites

A personal list of links to favorite WebCenter Spaces pages and external web sites.

Federated Portal Adapter

See **FPA**.

Feedback

In the **People Connections service**, a feature for posting informal appraisals for and receiving informal appraisals from other application users.

FOD

Fusion Order Demo. An enterprise application built using Oracle Fusion Middleware, including Oracle WebCenter, used to provide examples of WebCenter functionality.

FPA

Federated Portal Adapter. A component of **Oracle Portal** that enables Oracle Portal instances to share their database portlets through the web portlet interface. Using the FPA, Oracle Portal database portlets, including PL/SQL portlets, Portlet Builder portlets, and page portlets can be made available for use in WebCenter applications.

Full Screen Mode (WebCenter Spaces)

A view mode that opens the group space to occupy the entire screen, thus maximizing the display space. The Sidebar is not displayed in Full Screen Mode.

Full Screen mode (Portlets)

(**PDK-Java** portlets only.) A **portlet mode** that provides more content than can be shown in the portlet when it is sharing a page with other portlets.

Fusion Middleware Control

A browser-based management application that is deployed when you install Oracle WebCenter. From Fusion Middleware Control, you can monitor and administer a **farm** (such as Oracle WebCenter).

Fusion Order Demo (FOD)

See **FOD**.

Group Project group space

A group space created using the Group Project template. This type of group space provides an optimal structure for supporting a core project team where each member might come from a different department but all members contribute toward meeting a common goal.

group space

A work area within WebCenter Spaces that supports a group of people of any size that is organized around an area of interest or a common goal.

group space icon

An image displayed alongside group space names on the Group Spaces page in My Group Spaces to help other users with identification and location.

group space logo

An image displayed on the group space Home page to provide a visual identity for the group space. Group space logos also display alongside the group space name at the top of the page in Full Screen Mode.

group space member

A user who is participating in a group space. Members can be added or invited to a group space, or they can subscribe to a group space themselves if self-registration is enabled.

group space owner

A user who initially created a group space. The group space owner is automatically also a moderator of the group space.

group space template

A starting point for group space creation. WebCenter Spaces includes three templates to get you started: Group Project, Community of Interest, and Blank, but you can turn any group space into a template to use it as the starting point for other similar group spaces.

Group Space Unavailable page

A predefined page that displays when a group space member tries to open a group space that is temporarily offline. Moderators can customize this page.

HA

High Availability. A collection of solutions to ensure that your applications meet the required availability to achieve your business goals, eliminating single points of failure with no or minimal outage in service.

Help mode

A **portlet mode** that displays usage information about the functionality of the portlet.

High Availability

See **HA**.

HTML Markup layout component

An Oracle Composer layout component. A simple HTML component that renders raw HTML and JavaScript mark-up inline on the page.

Hyperlink layout component

An Oracle Composer layout component. A link to an internal or external web page. For designers of custom WebCenter applications, this is the runtime equivalent of a Go Link component.

IDE

Integrated Development Environment. A visual application development tool containing editors, debuggers, screen painters, object browsers, and the like. **Oracle JDeveloper** is an example of an IDE.

Identity Propagation

For a custom WebCenter application and associated content repositories, selecting this option allows propagation of current user's identity across the application and processes. The propagated identity is verified on the receiver's side, and then it is used to make decisions such as assigning role based access control.

Image layout component

An Oracle Composer layout component. An illustration that can include a hyperlink. For designers of custom WebCenter applications, this is the runtime equivalent of an Image Link component.

IMP service

See **Instant Messaging and Presence service**.

initialization parameters

The parameters initialized upon the start-up of a standard JSR 168 portlet. Initialization parameters provide an alternative to JNDI (Java Naming and Directory Interface) variables. Use initialization parameters instead of JNDI to configure the behavior of all of the different components of the portlet—for example, servlets and other portlets—in a compatible way. In **Oracle WebCenter**, initialization parameters are entered into the `portlet.xml` file.

Instant Messaging and Presence service

A WebCenter service that enables users to observe the presence status of other authenticated users and provides instant access to interaction options, such as instant messages, emails, and phone calls.

Integrated Development Environment

See **IDE**.

Integrated WLS

Integrated WebLogic Server. A WLS instance used as a platform for pretesting WebCenter application deployments on a local computer. Integrated WLS also contains preconfigured portlet producers and several useful prebuilt portlets.

JAAS

Java Authentication and Authorization Service (JAAS) is a Java package that enables applications to authenticate and enforce access controls upon users. JAAS is designed to complement Java 2 security and implements a Java version of the standard Pluggable Authentication Module (PAM) framework. This enables an application to remain independent from the authentication service, and supports the use of custom authentication modules.

JAAS extends the access control architecture of the Java 2 Security Model to support subject-based authorization. It also supports declarative security settings in deployment descriptors instead of being limited to code-based security settings.

Java Authentication and Authorization Service

See **JAAS**.

Java Content Repository

See **JCR 1.0**.

Java EE

Also known as Java EE 5. Java Enterprise Edition 5 Platform. A platform that enables application developers to develop, deploy, and manage multitier, server-centric, enterprise-level applications. The Java EE platform offers a multitiered distributed application model, integrated XML-based data interchange, a unified security model, and flexible transaction control. You can build your own Java EE portlets and expose them through web producers.

Java Enterprise Edition 5 Platform

See **Java EE**.

Java Portlet Specification

Standardizes how components for portal servers are to be developed. This specification defines a common portlet **API** and infrastructure that provides facilities for personalization, presentation, and security. Portlets using this **API** and adhering to the specification are product-agnostic, and can be deployed to any portal product that conforms to the specification. See also **JSR 168**.

Java Specification Request

See **JSR 168**.

JavaServer Faces

See **JSF**.

JavaServer Page

See **JSP**.

JCR 1.0

Java Content Repository 1.0. Also known as JSR 170. It proposes a standard access and interaction **API** for content repositories, much like JDBC does for databases.

JDeveloper

See **Oracle JDeveloper**.

JSF

JavaServer Faces. A standard Java framework for building web applications. It simplifies development by providing a component-centric approach to developing Java web user interfaces. JSF offers rich and robust **API**s that provide programming flexibility and ensures that applications are well designed with greater maintainability by integrating the Model-View-Controller (**MVC**) design pattern into its architecture. As JSF is a Java standard developed through Java Community Process, development tools like **Oracle JDeveloper** are fully empowered to provide easy to use, visual, and productive development environments for JSF.

JSF JSP

JavaServer Faces JavaServer Page. JSF JSPs differ from plain JSPs through their support of **Oracle ADF Faces** components for the user interface and JSF technology for page navigation. JSF JSP pages leverage the advantages of the Oracle **Application Development Framework** (Oracle ADF) by using the ADF Model binding capabilities for the components in the pages.

JSP

JavaServer Page. An extension to servlet functionality that provides a simple programmatic interface to web pages. JSPs are HTML pages with special tags and embedded Java code that is executed on the web or application server. JSPs provide dynamic functionality to HTML pages. They are actually compiled into servlets when first requested and run in the servlet container.

See also **JSP tags**.

JSP tags

Tags that can be embedded in **JSP**s to enclose Java code. These tags use the `<jsp:` syntax and enclose action elements in the JSP with `begin` and `end` tags similar to XML elements.

JSR 168

Java Specification Request (JSR) 168. Defines a set of **API**s for building standards-based portlets using Java. Portlets built to this specification can be rendered to a portal locally or deployed to a WSRP container for rendering portlets remotely. For more information, see `http://jcp.org/en/jsr/detail?id=168`.

JSR 170

See **JCR 1.0**

JSR 301

See **Oracle JSF Portlet Bridge**.

keystore

A file that provides information about available public and private keys that are used for authentication and data integrity. User certificates and the trust points needed to validate the certificates of peers are also stored securely in the keystore.

layout box

A container that enables placement of content on a WebCenter Spaces page.

layout component

An object for enhancing the usefulness and appearance of a given page. Layout components include layout boxes, a rich text editor, images, hyperlinks, and so on.

Layout Customizable component

A component provided in the Oracle Composer tag library that enables users to select from a set of predefined layouts (for example, two column, three column, two row, and so on) and apply it to the page. Users can apply these layouts to a particular area of the page or to the entire page.

LDAP

Lightweight Directory Access Protocol. A standard, extensible directory access protocol. It is a common language that LDAP clients and servers use to communicate. The framework of design conventions supporting industry-standard directory products, such as the Oracle Internet Directory.

lifecycle

See **application lifecycle**.

Lightweight Directory Access Protocol (LDAP)

See **LDAP**.

Links service

A WebCenter service that provides a means of creating a bidirectional association between two objects, thus setting up easy access between those objects.

List Manager

A task flow of the Lists service that provides access to all the tools for creating and revising lists and list content and to all of a group space's current lists.

Lists page

A predefined page that displays the group space's current lists.

Lists Viewer

A task flow of the Lists service that provides a means of placing a particular list on a group space page.

Mail service

A WebCenter service for exposing familiar email functionality in WebCenter applications.

Managed Server

In a production environment, a Managed Server hosts applications and the resources needed by those applications. A domain, which is a logically related group of Oracle WebLogic Server resources, can have any number of Managed Servers. An Administration Server manages these servers.

mashup

A web application that enables end users to pull information from different sources to create a personalized application that exactly meets their individual requirements.

See also **enterprise mashup**.

MBean Browser

In Fusion Middleware Control, MBean browsers enable the administrator to perform specific monitoring and configuration tasks and browse MBeans for an Oracle WebLogic Server or a selected application.

MDS

Oracle Metadata Services. A core technology of the **Application Development Framework**. MDS provides a unified architecture for defining and using metadata in an extensible and customizable manner.

MDS repository

An application server and Oracle relational database that keep metadata in these areas: a file-based repository, dictionary tables accessed by build-in functions, and a metadata registry. One of the primary uses of MDS is to store customizations and persisted personalization for Oracle applications.

Message Board

In the **People Connections service**, a feature for posting messages to and receiving messages from other application users.

Model-View-Controller

See **MVC**.

moderator

A WebCenter Spaces user who is responsible for managing a particular group space. A group space moderator can add and remove members, invite new members, enable self registration, provide and update group space metadata, and manage the services available to the group space.

Movable Box layout component

An Oracle Composer layout component. A container that enables the placement of content on a WebCenter Spaces page. Movable Boxes, along with their content, can be moved around on the page. For designers of custom WebCenter applications, this is the runtime equivalent of Show Detail Frame component.

MVC

Model-View-Controller. A classic design pattern often used by applications that need the ability to maintain multiple views of the same data. The MVC pattern hinges on a clean separation of objects into one of three categories: models for maintaining data, views for displaying all or a portion of the data, and controllers for handling events that affect the model or views. Because of this separation, multiple views and controllers can interface with the same model. Even new types of views and controllers that never existed before, such as portlets, can interface with a model without forcing a change in the model design.

My Group Spaces page

A predefined page that displays a list of all the group spaces and group space templates available to the currently logged in user. This includes group spaces of which the user is a member, group spaces marked as discoverable, and group spaces that are public and available to everyone.

navigation parameter

Parameters in a **WSRP** container that map to the render parameters with the same name in **JSR 168** portlet code. Navigation parameters are exposed by the portlet to the consumer. The consumer stores and manages parameter values and sends them on every invocation to the portlet. Navigation parameters are a WSRP version 2 feature.

Notes service

A WebCenter service that provides useful features for writing personal notes and reminders. This service is available only in WebCenter Spaces, and not in custom WebCenter applications.

OAM

See **Oracle Access Manager (OAM)**.

OHS

See **Oracle HTTP Server (OHS)**.

OmniPortlet

A component of **Oracle WebCenter** that enables you to inject portal-like capabilities, such as portlets, content integration, and customization, into your **Oracle ADF Faces** applications.

Oracle Access Manager (OAM)

Part of Oracle's enterprise class suite of products for identity management and security, Oracle Access Manager provides a wide range of identity administration and security functions, including several single sign-on options for WebCenter Spaces and WebCenter custom applications. OAM is the recommended single sign-on solution for Oracle WebCenter 11g installations.

Oracle ADF Faces

Oracle **ADF** Faces is a rich set of user interface components based on the new **JavaServer Faces** JSR (JSR 127). Oracle ADF Faces provide various user interface components with built-in functionality, such as data tables, hierarchical tables, and color and date pickers, that can be customized and reused in an application.

Oracle Composer

A seamlessly integrated environment for populating, revising, and configuring WebCenter application pages. It enables users to easily build or revise page layout and content. It also provides the means of adding different components, such as task flows, portlets, content, and other objects, onto a page and then linking those components for a more relevant or personalized view of the information.

Oracle Content Server

A content repository for building secure business libraries with check in and check out, revision control, and automated publishing in web-ready formats. Current information is available to authorized users anytime, anywhere.

Oracle Content Server is a component of Oracle Universal Content Management.

Oracle WebCenter Discussions Server

Enables integration of discussion forums and announcements into WebCenter application.

Oracle Enterprise Manager

A component that enables administrators to manage Oracle Fusion Middleware services through a single environment. The Fusion Middleware administrator uses Enterprise Manager to configure, manage, and monitor WebCenter applications.

Oracle HTTP Server (OHS)

Software that processes web transactions that use the Hypertext Transfer Protocol (HTTP). Oracle uses HTTP software developed by the Apache Group.

Oracle Internet Directory

Oracle's LDAP V3 compliant LDAP server. It is used as a repository for provisioning users and groups. By default, the **Oracle Single Sign-On (OSSO)** authenticates user credentials against Oracle Internet Directory information about dispersed users and network resources. Oracle Internet Directory combines LDAP version 3 with the high performance, scalability, robustness, and availability of the Oracle database.

Oracle JDeveloper

Oracle JDeveloper is an integrated development environment (**IDE**) for building applications and web services using the latest industry standards for Java, XML, and SQL. Developers can use Oracle JDeveloper to create Java portlets.

Oracle JSF Portlet Bridge

Based on and conforming to JSR 301, the Oracle JSF Portlet Bridge enables application developers to expose a JSF application or task flow as a JSR 168 portlet for consumption in another application.

Oracle Metadata Services

See **MDS**.

Oracle Portal

A component used for the development, deployment, administration, and configuration of enterprise class **portal**s. Oracle Portal incorporates a portal building framework with self-service publishing features to enable you to create and manage information accessed within your portal.

Oracle SES

Oracle Secure Enterprise Search (SES) provides easy-to-use search for public and secure data. It is included with **Oracle WebCenter**. You can override the default search adapters in WebCenter Spaces and use Oracle SES, which provides unified ranking results. The results are listed together, instead of being clustered into separate sections for Documents, Discussions, and so on, with the most relevant items appearing first.

Oracle Single Sign-On (OSSO)

A component that enables users to log in to all features of the Oracle Fusion Middleware product suite, and to other web applications, using a single user name and password.

Oracle SOA Suite

A middleware component of Oracle Fusion Middleware. Oracle SOA Suite enables services to be created, managed, and orchestrated into SOA composite applications. Composites enable you to easily assemble multiple technology components into one SOA composite application. Oracle SOA Suite plugs into heterogeneous infrastructures and enables enterprises to incrementally adopt SOA.

Oracle Technology Network

See **OTN**.

Oracle Universal Content Management

A consolidated content management application that provides multisite web content management, document management, digital asset management and records management.

Oracle WebCenter

A suite of services that enables you to build custom WebCenter applications. Oracle WebCenter reduces the front-end labor historically required to bring necessary business components to the user by capitalizing on the notion of Service Oriented Architecture (SOA). The suite includes a wide range of plug-and-play products, tools, and services that make it easy to build the applications your users need. Oracle WebCenter includes:

- **WebCenter services**
- **Oracle WebCenter Framework**
- **content integration services**
- **ADF**
- **Oracle SES**
- **Oracle WebCenter Discussions Server**
- Mobile Services
- Portlet Pack

Oracle WebCenter Framework

A set of features provided by **Oracle WebCenter** that augments the Java Server Faces (JSF) environment by providing additional integration and runtime customization options It is the basis of Oracle WebCenter and supports the creation and execution of context-rich applications, which can come in the form of human interaction, files and documents, or a clear representation of where the user is within a complex work process. It includes such features as:

- Portlet support
- **content integration services**
- **Oracle JSF Portlet Bridge**
- Search framework
- Customizable components

Oracle WebLogic Server Administration Console

A browser-based, graphical user interface to manage a WebLogic Server domain. Use to:

- Configure, start, and stop WebLogic Server instances
- Configure WebLogic Server clusters
- Configure WebLogic Server services, such as database connectivity (JDBC) and messaging (JMS)
- Configure security parameters, including creating and managing users, groups, and roles
- Configure and deploy your applications
- Monitor server and application performance
- View server and domain log files
- View application deployment descriptors
- Edit selected run-time application deployment descriptor elements

Oracle WebCenter Wiki and Blog Server

Supports integration of wikis and blogs into WebCenter applications. It also supports features that enable application users to create their own wikis and blogs.

OTN

Oracle Technology Network. The online Oracle technical community that provides a variety of technical resources for building Oracle-based applications. You can access OTN at `http://www.oracle.com/technology/`.

Page Customizable component

A component provided in the Oracle Composer tag library that defines the editable area of a page at runtime. Within this area, users can edit properties for a component, add content to the page, arrange content, and so on.

page parameter

A parameter associated with a page that can be used to store values that can then be passed to the components on the page. It also enables your page to take values through its URL. Page parameters are defined using the <parameter> tag at the top of your `PageDef.xml`. You can bind page parameters to your **page variable**s.

Page Properties

A dialog, accessed from Oracle Composer, that provides access to a page's display options, security settings, and parameters.

page scheme

Determines the background image used in the page. WebCenter Spaces provides several default page schemes and an option for specifying a custom page scheme.

Page service

A service for creating new pages and task flows in your application at runtime.

page style

Determines the initial page structure, for example one column or two column. Some default page styles also include the task flows, components, and page properties useful for a particular purpose. For example, a page created using the Text page style includes a Text layout component.

page variable

A variable that binds your public portlet parameter to the page. Page variables are defined within the `<variableIterator>` of your `PageDef.xml`. One page variable can be bound to multiple public portlet parameters.

Panel Customizable component

A component provided in the Oracle Composer tag library that provides a container region for a group of Oracle ADF components and portlets that are customizable at runtime. Any Show Detail Frame components and portlets added as child components to a Panel Customizable component can be moved or maximized with the Panel Customizable component.

parameter

A variable that controls the default behavior of task flow content and facilitates the wiring of a task flow to page parameters and page definition variables.

parent component

A component that contains other components, such as a Box layout component that contains task flows. The Box is the parent component of the task flows. In contrast, the task flows are the Box's child components.

See also **Child Components**.

participant

A WebCenter Spaces user who can manipulate the content of a group space. A participant can upload and share documents, initiate and take part in chats with other members, create discussion topics, create new or view existing lists.

PDK-Java

Java Portlet Developer Kit. The development framework used to build and integrate web content and applications with **Oracle WebCenter**. It includes toolkits, samples, and technical articles that help make portal development simple. You can take existing Java **servlet**s, **JSP**s, URL-accessible content and web services and turn them into **portlet**s. It is typically used by external developers and vendors to create portlets and services.

People Connections service

A WebCenter service that provides social networking tools for creating, interacting with, and tracking the activities of one's enterprise connections.

See also, **Activity Stream**, **Connections**, **Feedback**, **Message Board**, and **Profile**.

personalization

An update that affects only the user who made it.

personal page

A page created by a user in his or her personal space. Personal pages are viewable by other users only if specifically granted access by the user who created the page.

personal profile

A page that displays a user's personal information such as email address, phone number, office location, department, manager, direct reports, and so on.

See also, **Profile**.

personal space

A work area within WebCenter Spaces that provides individual users with a private space for storing personal content, keeping notes, viewing and responding to assignments, maintaining a list of online buddies, and performing many other tasks relevant to their unique working day. Users can also extend this environment by creating additional personal pages and custom content.

portal

A common interface (that is, a web page) that provides a personalized, single point of interaction with web-based applications and information relevant to individual users or class of users.

Portal Developer Kit

See **PDK-Java**.

portlet

A reusable web component that can draw content from many different sources. Portlets can display excerpts of other web sites, generate summaries of key information, perform searches, and access assembled collections of information from a variety of data sources. Because different portlets can be placed on a common page, the user receives a single-source experience, even though the content may be derived from multiple sources. Portlet resources include the many prebuilt portlets availble out of the box and programmatic portlets built through WebCenter's JSR 168, PDK-Java Portlet wizards, and other portlet building tools.

portlet mode

The ways by which a **portlet** can be called to display information. These methods include:

- **Shared Screen mode** or **View mode**
- **Edit mode** or **Edit Defaults mode**
- **Customize mode**
- **Help mode**
- **About mode**

- **Full Screen mode (Portlets)** or **Show Details Page mode**

Portlet Producer Application template

An application template, provided by JDeveloper, for creating an application with the recommended projects and technology scopes required for developing portlets. The Portlet Producer Application template consists of a single project scoped for portlet creation (Portlets).

See also **WebCenter Application template**.

predefined page

A page created by WebCenter Spaces to perform a specific function. Examples of predefined pages include, Welcome pages, Search pages, and Documents pages.

Predeployment Tool

A utility for **custom WebCenter application**s that assists you in configuring your target system with the new producer registrations you have added to your application in Oracle JDeveloper. You must run this utility before deploying your application. You can also use this utility after deployment to migrate metadata from stage to production, for example, to export and import your customizations. This tool also enables you to define the **MDS** repository location to allow run-time customizations to be migrated.

pretty URL

A shortened version of a page's URL that hides the complexity of the real web address.

private parameter

A portlet parameter that is known only to the portlet itself and has no connection to the page on which the portlet resides.

Contrast with **public parameter**.

producer

A communication link between portlet consumers (such as a **custom WebCenter application** or a **portal**). When a consumer application renders a portlet, it calls the producer of that portlet, which in turn executes the portlet and returns the results in the form of portlet content. A producer can contain one or more portlets. A portlet can be contained by only one producer.

Oracle WebCenter supports two types of producers:

- Oracle **PDK-Java** producers: Deployed to a **Java EE** application server, which is often remote and communicates through Simple Object Access Protocol (SOAP) over HTTP.
- **Web Services for Remote Portlets** (WSRP): A web services standard that enables the plug-and-play of visual, user-facing web services with portals or other intermediary web applications. Being a standard, WSRP enables interoperability between a standards-enabled container based on a particular language (such as **JSR 168**, .NET, Perl) and any WSRP portal. A portlet (regardless of language) deployed to a WSRP-enabled container can be rendered in any application that supports this standard.

Profile

In the **People Connections service**, a feature for viewing and managing information about yourself, such as your contact information, manager, and direct reports, and for viewing this information about other application users.

programmatic portlets

Portlets constructed in a non-declarative manner using **API**s. Also referred to as *hand-* or *manually-coded* portlets.

public group space

A group space that is available to all users, even those who are not logged in to WebCenter Spaces.

public page

A page within WebCenter Spaces that is available to all users, even those who are not logged in to WebCenter Spaces.

public parameter

A portlet parameter that is known to the page and bound to it by way of a page variable.

Contrast with **private parameter**.

public user

A user who can access, but is not logged into, a **WebCenter application**. A public user can view any page that has been marked as public, but cannot personalize or edit any content, or view pages that have any form of access control.

Contrast with **authenticated user**.

Recent Activities service

A WebCenter service that provides a means of tracking recent activities in a WebCenter application.

Recent Documents task flow

A Documents service task flow that exposes the files most recently modified in some way.

resize handle

A user interface element in a task flow chrome increasing or decreasing the height of the task flow.

Resource Action Handling framework

Enables services that expose custom resources to be viewed, searched, and tagged.

Resource Catalog

A catalog that provides a federated view of one or more otherwise unrelated repositories in a unified search and browse user interface. Resources are created and published in their source repository and are then exposed to the developer in JDeveloper's Resource Palette and to the end user in the Resource Catalog Viewer. Resource catalogs can contain layout components, Oracle ADF components, portlets, service task flows, and documents.

Resource Index

The starting point for accessing WebCenter REST APIs. Sending a GET request to the Resource Index URI returns a list of links to entry points for all available services.

resource type

Defines the type of resource that a WebCenter REST API link identifies. Use resource types to determine the response bodies for GET requests and allowable request bodies for POST and PUT. Also use `resourceType` attributes on entities to uniquely identify their type.

REST APIs

Oracle WebCenter provides a set of web-based REST (REpresentational State Transfer) APIs for retrieving and modifying server data dynamically from the client. REST APIs are available for **Discussions service**, **People Connections service**, and **WebCenter Spaces**.

Reverse Proxy Server

A server process that hides the physical location of internal servers by exposing the servers as a single public site. Requests to the public site are routed to the appropriate internal server.

Rich Text portlet

A portlet, based on the **WSRP** standard, offering browser-based rich text editing at runtime on a deployed Oracle ADF **JavaServer Faces** JSP.

RSS service

A WebCenter service that provides a means of publishing content from other services as news feeds. The RSS service supports both RSS 2.0 and Atom 1.0 formats.

Search page

A predefined page for running searches, creating and managing saved searches, and viewing and refining search results.

Search service

A WebCenter service that enables the discovery of information and people in a WebCenter application, returning only the results users are authorized to see

Secure Enterprise Search

See **Oracle SES**.

secured application page

A page created by a user that has not been made available to public users.

Self-Registration page

A predefined page where users can register with WebCenter Spaces, thus creating themselves an identity store login account. Administrators can customize certain aspects of this page.

Self-Subscription page

A predefined page where users can register to become members of a group space. Moderators can customize certain aspects of this page.

service ID

In Expression Language, the string that identifies a particular service. For example, the string `oracle.webcenter.collab.announcement` is the service ID for the Announcements service.

A PDK-Java producer's unique identifier. PDK-Java enables you to deploy multiple producers under a single adapter servlet. Different producers are identified by their unique service IDs. A service ID is required only when a service ID/producer name is not appended to the URL endpoint.

Service Oriented Architecture

See **SOA**.

servlet

A Java program that usually runs on a **Web server**, extending the web server's functionality. HTTP servlets take client HTTP requests, generate dynamic content (such as through querying a database), and provide an HTTP response.

session language

A display language specified by the user that remains in effect for the life of the session cookie (from log on to log off). If the user clears browser cookies, the display language reverts to the user-level default language, if specified, then to the application-level default language set by the WebCenter Spaces administrator. Set the session language in the Change Language pop-up, accessible from the Welcome page.

Shared Screen mode

A **portlet mode** that renders the body of the portlet and enables you to display a portlet on a page that can contain other portlets. Every portlet must have at least a Shared Screen mode.

See also **View mode**.

Show Detail Frame component

A component provided in the Oracle Composer tag library that renders a border or chrome around the child component. It provides a header with an Actions menu and thereby providers user interface (UI) controls to customize the display of the child component. However, to customize the display of the child component, the Show Detail Frame component must be included inside a Panel Customizable component.

Show Details Page mode

A **portlet mode** that provides full-browser display of the portlet. For example, a portlet in **Show Page mode** could be limited to displaying only the ten most recently submitted expense reports, while the same portlet in Show Details Page mode could show all submissions.

Contrast with **Show Page mode**.

show modes

Types of **portlet mode**s encompassing **Show Page mode** and **Show Details Page mode**.

Show Page mode

A **portlet mode** that provides a smaller portlet display to allow space for additional portlets and other objects in the browser window. For example, a portlet in Show Page mode could be limited to displaying only the ten most recently submitted expense reports, while the same portlet in Show Details Page mode could show all submissions.

Contrast with **Show Details Page mode**.

Sidebar

A panel in WebCenter Spaces that provides quick access to tools and information essential to personal productivity, including mail, personal contacts, and so on.

skin

A style sheet based on the CSS 3.0 syntax specified in one place for an entire application. Instead of providing a style sheet for each component, or inserting a style sheet on each page, you can create one skin for the entire application.

SOA

Service Oriented Architecture. A design methodology aimed at maximizing the reuse of application services.

Source view (JDeveloper)

A view, in **Oracle JDeveloper**, that provides a way to directly edit the source code of a file.

Source view (WebCenter Spaces)

A view, in Oracle Composer, that provides a selectable structural representation of a page and its components.

See also Design view (WebCenter Spaces).

struts

A development framework for Java servlet applications based upon the **MVC** design paradigm.

style properties

Used to override the style information from the skin CSS to set specific instances of component display.

Tags service

A WebCenter service that enables users to apply their own terms to application objects, making it possible to search for those objects using personally meaningful terms.

task flow

A set of ADF Controller activities, control flow rules, and managed beans that interact to allow a user to complete a task. Task flows provide a modular approach for defining control flow in an application. Instead of representing an application as a single JSF page flow, developers can break it up into a collection of reusable task flows.

task flow header

An area at the top of a task flow that displays the task flow name and various tools for interacting with the task flow.

template

See group space template.

Text layout component

An Oracle Composer layout component. A rich text editor for providing static page text. For designers of custom WebCenter applications, this is the runtime equivalent of a Rich Text Editor component.

Unauthorized Access page

A predefined page that is shown when someone without access permission tries to open a page.

URL parameter

See **private parameter**.

validation-based caching

A **caching** method that uses a validation check to determine if the cached item is still valid.

Contrast with **expiry-based caching**.

viewer

WebCenter Spaces users who can look at the information in a group space but cannot contribute any of their own.

View mode

(**JSR 168** portlets only.) A **portlet mode** that enables you to display a JSR 168 portlet on a page that can contain other portlets. It is the only required mode for JSR 168 portlets.

See also **Shared Screen mode**.

WAR

Web application archive file. This file is used in deploying applications on a **Java EE** application server. WAR files encapsulate in a single module all of the components necessary to run an application. WAR files typically contain an application's **servlet**, **JSP**, and **JSF JSP** components.

See also **EAR**.

Web 2.0

Technologies, such as wiki, RSS, and blogs, that enable the construction of highly interactive web applications.

See also **WebCenter services**.

Web Application Archive file

See **WAR**.

Web Clipping

A browser based declarative tool that enables developers and page designers to integrate any Web content with a WebCenter application. It is designed to provide quick integration by leveraging the existing user interface.

Web Clipping portlet

A browser-based declarative tool that enables you to integrate any web application with your **custom WebCenter application**. It is designed to give you quick integration by leveraging the web application's existing user interface. You can drag and drop Web Clipping portlets onto a `*.jspx` page.

Web Page layout component

An Oracle Composer layout component. A means of embedding another web site, wiki, or blog within the context of a WebCenter Spaces page. For designers of custom WebCenter applications, this is the equivalent of an Inline Frame component.

Web server

A program that delivers web pages.

Web Services for Remote Portlets

See **WSRP**.

WebCenter

See **Oracle WebCenter**.

WebCenter application

WebCenter applications encompass both **custom WebCenter application**s and **WebCenter Spaces**.

WebCenter application administrator

The administrator responsible for maintaining the **WebCenter application**. For example, in WebCenter Spaces, the administrator performs tasks such as implementing the branding for the WebCenter application, making new content available, modifying pages, and granting and revoking privileges.

Contrast with systems administrator who has administrative rights for entire Fusion Middleware functions. The Fusion Middleware administrator is also responsible for deploying, setting up, and configuring the WebCenter application, and performing on-going administrative tasks for the WebCenter application and other WebCenter components through Fusion Middleware Control.

WebCenter application developer

The developer who plans, builds, and maintains a **custom WebCenter application** using the Oracle Application Development Framework, **Oracle JDeveloper**, and **Oracle WebCenter**.

WebCenter application end user

The WebCenter application end user is the runtime user of the **WebCenter application**, who accesses pages, portlets, and content, and personalizes portlets (assuming the appropriate privileges).

WebCenter Application template

An application template, provided by JDeveloper, for creating an application with the recommended projects and technology scopes required for developing a WebCenter application. The WebCenter Application template consists of a project for the data model (Model) and a project for consuming portlets, components, and data controllers (ViewController).

See also **Portlet Producer Application template**.

WebCenter Extension for Oracle JDeveloper

An extension available through the Oracle JDeveloper Update Wizard that installs the necessary libraries, templates, wizards, and dialogs needed to build and deploy **custom WebCenter application**s in **Oracle JDeveloper**.

WebCenter Framework

See **Oracle WebCenter Framework**.

WebCenter services

A collection of Web 2.0 services that expose social networking and personal productivity features through various services.

- Announcements service
- Blog service
- Discussions service
- Documents service
- Events service
- Instant Messaging and Presence service
- Links service
- Mail service
- Notes service
- People Connections service
- Recent Activities service
- RSS service
- Search service
- Tags service
- Wiki service
- Worklist service

WebCenter Spaces

A web-based application that offers the very latest technology for social networking, communication, collaboration, and personal productivity. WebCenter Spaces uses services and applications to bring everything together that users require to exchange ideas with others, keep track of personal and work-related tasks, interact with critical applications, and zero in on projects and interests; all within a single integrated environment.

WebCenter Spaces is a **WebCenter application**.

WebCenter Spaces application administrator

See administrator.

WebCenter Spaces RSS reader

An RSS reader provided with WebCenter Spaces that incorporates public news feeds from external sources onto application pages. This RSS reader is available only in WebCenter Spaces, and not in custom WebCenter applications.

WebCenter systems administrator

See administrator.

WebLogic Server

See **WLS**.

Welcome page

There are two types of Welcome page:

- Public Welcome page: A predefined page that users encounter before logging in to WebCenter Spaces.
- Personal Welcome page: A predefined page that introduces users to their personal space.

wiki page

A page that provides in-place editing using HTML or a simple mark-up language. Any user with sufficient privileges can add, revise, and remove wiki content.

Wiki service

A WebCenter service for integrating wiki pages in WebCenter applications.

WLS

WebLogic Server. A scalable, enterprise-ready Java Platform, Enterprise Edition (Java EE) application server. The WebLogic Server infrastructure supports the deployment of many types of distributed applications and is an ideal foundation for building applications based on Service Oriented Architectures (SOA).

See also **Integrated WLS**

WLST

WebLogic Scripting Tool. A command line tool for managing Oracle Fusion Middleware components, such as Oracle WebCenter.

Worklist service

A WebCenter service that provides access to notifications, alerts, and BPEL tasks assigned to the current user.

WSRP

Web Services for Remote Portlets (WSRP) is a web services standard that allows the plug-and-play of visual, user-facing web services with portals or other intermediary web applications. Being a standard, WSRP enables interoperability between a standards-enabled container based on a particular language (such as JSR 168, .NET, Perl) and any WSRP portal. A portlet (regardless of language) deployed to a WSRP-enabled container can be rendered on any portal that supports this standard.

XSL

Extensible Stylesheet Language (XSL) is the language used within style sheets to transform or render XML documents.

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