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Interaction

User Guide

Version 10g Release 3 (10.3)
Revised: November 2008

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Introduction to the User Guide for Oracle WebCenter Interaction

The *User Guide for Oracle WebCenter Interaction* describes how browsing users perform tasks in the portal user interface.

Audience

This book is written for browsing users, which are users that can view My Pages, communities, and documents in the Knowledge Directory, but are not responsible for creating portal objects or any other administrative tasks.

Oracle Documentation and Resources

The following documentation and resources are available from Oracle.

Table 1: Documentation

Resource	Description
Installation Guide for Windows	This guide describes the prerequisites (such as required software) and procedures for installing Oracle WebCenter Interaction 10.3 on Windows machines.
	It is available on the Oracle Technology Network at *http://download.oracle.com/docs/cd/E13158_01/alui/wci/docs103/index.html*.
Installation Guide for Unix and Linux	This guide describes the prerequisites (such as required software) and procedures for installing Oracle WebCenter Interaction 10.3 on Unix and Linux machines.
	It is available on the Oracle Technology Network at *http://download.oracle.com/docs/cd/E13158_01/alui/wci/docs103/index.html*.
Upgrade Guide for Windows	This guide describes the prerequisites (such as required software) and procedures for upgrading from AquaLogic Interaction 6.5 MP1 to Oracle WebCenter Interaction 10.3 on Windows machines.
	It is available on the Oracle Technology Network at *http://download.oracle.com/docs/cd/E13158_01/alui/wci/docs103/index.html*.
Upgrade Guide for Unix and Linux	This guide describes the prerequisites (such as required software) and procedures for upgrading from AquaLogic Interaction 6.5 MP1 to Oracle WebCenter Interaction 10.3 on Unix and Linux machines.
	It is available on the Oracle Technology Network at *http://download.oracle.com/docs/cd/E13158_01/alui/wci/docs103/index.html*.
Release Notes	The release notes provide information about new features, issues addressed, and known issues in the release.
	They are available on the Oracle Technology Network at *http://download.oracle.com/docs/cd/E13158_01/alui/wci/docs103/index.html*.
Administrator Guide	This guide describes how to manage, maintain, and troubleshoot Oracle WebCenter Interaction.
	It is available on the Oracle Technology Network at *http://download.oracle.com/docs/cd/E13158_01/alui/wci/docs103/index.html*.

Resource	Description
Online Help	The online help is written for all levels of Oracle WebCenter Interaction users. It describes the user interface for Oracle WebCenter Interaction and gives detailed instructions for completing tasks in Oracle WebCenter Interaction. To access online help, click the help icon.

Table 2: Other Resources

Resource	Description
Oracle Technology Network (OTN)	The Oracle Technology Network is the world's largest community of developers, DBAs, and architects using Oracle products and industry-standard technologies. Every day, members collaborate via OTN to share real-world insight, expertise, and best practices on how to build, deploy, manage, and optimize applications. As a member of the Oracle Technology Network you will enjoy access to software downloads, discussion forums, documentation, wikis, podcasts, blogs, plus much more. Access the Oracle Technology Network at *http://www.oracle.com/technology/index.html*.
Oracle Support	The Oracle Support site provides access to all Oracle support resources including online support, software and patches, technical articles, and contact numbers. Access the Oracle Support site at *http://www.oracle.com/support/index.html*.

Navigating the Portal

The portal includes some basic functionality in the portal banner and menus to access the different areas of the portal. The areas you see depend on the portal configuration, whether you are logged in, and your portal access.

- To determine whether you are logged in correctly, look at the portal greeting (at the top of the portal banner).

  By default your greeting is `Welcome, user name` where *user name* is the name of the user by which you are logged in. To change your greeting, click 🧍 **My Account**, then, on the My Account page, click **Display Options**.

- To access the Administrative Objects Directory, where you can create and manage portal objects and access portal utilities, click 📝 **Administration**.

  Note: You see 📝 **Administration** only if you have the Access Administration activity right. For information on Administrative Objects Directory features, see the *Administrator Guide for Oracle WebCenter Interaction*.

- To edit your user profile, personalize your display options, set your locale settings, set your search preferences, change your portal password, and manage user names and passwords for external accounts, as well as view your user profile, click 🧍 **My Account**.

- To display help for the page you are viewing, click 🔵 **Help**.

- To log in to the portal or log off the portal, click ➡ **Log In** or ➡ **Log Off**.

- To search for documents or objects in your portal, type your search string in the box in the portal banner and click **Search**.

- To go directly to the result that your portal administrator has set as the top best bet for a term, without first seeing all the search results, type the top best bet operator (>) followed by your search string and click **Search**, or type your search string and click ⚲.

  Note: If no top best bet has been set for the term, the regular search results appear.

  Note: The top best bet button (⚲) is available only if enabled by your portal developer.

- To search for documents or objects using metadata properties and location, click 🔷 **Advanced Search**.

- To search other content, portals, and web search engines, click 📦 **Federated Search**.

  Note: The 📦 **Federated Search** button is available only if enabled by your portal developer.

- To view your user profile, in the **My Profile** menu, click **View User Profile**.

- To view one of your personalized pages, in the **My Pages** menu, click the page you want to view.

  My Pages are your personalized view of the portal. You choose the applications, tools, and services (in the form of portlets) that you want to display on each My Page. For example, you might create a My Page that includes a search tool for all the employees in your company and a portlet that displays the most recent news about your company.

- To view and manage the communities to which you belong, select an option from the **My Communities** menu:

  - To view a community, click the community name.
  - To join a community, click **Join Communities**, select the communities you want to join, and click **Finish**.
  - To unsubscribe from a community, click **Unsubscribe Communities**, select the communities from which you want to unsubscribe, and click **Finish**.

  Communities are sites within a portal designed for a specific audience or task, such as collaborative projects. You might have communities based on departments in your company. For example, the Marketing department might have a community containing press information, leads volumes, a trade show calendar, and so on. The Engineering department might have a separate community containing project milestones, regulatory compliance requirements, and technical specifications.

- To browse documents in the portal, click **Directory**.

  The Knowledge Directory is similar to a file system tree in that documents are organized in folders and subfolders. A folder can contain documents uploaded by users or imported by content crawlers, as well as links to people, portlets, and communities. If your administrator has given you permission, you might also be allowed to add documents to the Knowledge Directory, or submit yourself as an expert on a particular topic.

Your Portal Account

This chapter explains how to create your own portal account (if necessary), how to log in to and log out of your portal account, and how to manage your portal account.

Creating Your Own Portal Account

Depending on your portal configuration, you might be able to create your own portal account.

Note: Access to everything in the portal is controlled by security privileges. Creating your own account does not necessarily give you access to content in the portal. To get additional security privileges, contact your portal administrator.

1. On the Log In page, click **Create an Account**.
2. In the **User name** box, type the user name you want to use to log in to the portal.
   Your user name can contain spaces.
3. In the **Password** box, type the password you want to use to log in to the portal.
   Your password is case-sensitive and must be at least five characters long.
4. In the **Confirm password** box, type your password again.
5. To create your personalized portal account, click **Create Account**.
   When your account is successfully created, a welcome page displays an introduction to the portal.

Logging In to the Portal

Log in to the portal to access everything you have permission to see.

Note: If you are unsure of your user name, password, or authentication source, ask your portal administrator.

1. If the page you are viewing is not the log in page and does not include a portal login portlet, in the portal banner, click **Log In**.

2. In the **User name** box, type your portal user name.

   Your portal administrator might have imported your user account from Windows, Exchange, Notes, Novell, or another system. If so, you probably use the same user name you use to log in to your computer or mail account.

3. In the **Password** box, type your portal password.

   This might be the same password you use to log in to your computer or mail account.

4. If necessary, in the **Authentication Source** drop-down list, select the appropriate authentication source.

   - If you are using the same user name and password you use to log in to your computer, look for an authentication source named similarly to the domain you use to log in to your computer.

   - If you created your own portal account, through Create an account, choose **WCI User Database**.

   - To automatically log in for future sessions, select **Remember my password**.

     If other people are likely to use your computer, to ensure portal security, do not enable this option.

5. To log in to the portal, click **Log In**.

Logging Off the Portal

You might want to log off the portal to ensure that any people who have access to your computer cannot use your portal account.

- To log off the portal, in the portal banner, click **Log Off**.

  Note: Clicking **Log Off** also clears the **Remember my password** setting.

Managing Your Portal Account

On the My Account page you can manage your user profile, set display options, set your locale, set search preferences and manage saved searches, and manage passwords.

To display the My Account page, in the portal banner, click 👤 **My Account**.

Note: The My Account link is only visible when you are logged in to the portal.

Editing Your User Profile

You can update your user profile information, such as e-mail address or phone number.

User profile information can be viewed or searched by users or passed to certain portal objects for authentication or use as metadata.

1. In the portal banner, click **My Account**.
2. On the My Account page, click **Edit User Profile**.
3. Type the information you want to provide in the appropriate text boxes.

    Note: Your portal administrator may have populated some information automatically and may have set some information to read only.

4. If there are multiple user profile pages listed on the left and you want to change information on another page, click the page name and change your information.
5. When you are done, click **Finish** to save your settings, or click **Cancel** to revert to your previous settings.

Setting Your Display Options

You can specify the portal interface and greeting to display, how documents open, and refresh and time out settings for My Pages.

1. In the portal banner, click **My Account**.
2. On the My Account page, click **Display Options**.
3. Set your display options:

   - *Selecting Your Portal Interface* on page 18
   - *Setting Your Portal Greeting* on page 19
   - *Specifying How Portal Documents Open* on page 20
   - *Setting Your My Page Refresh Rate* on page 20
   - *Setting Your Portlet Time Out Limit* on page 21

4. When you are done specifying all your display settings, click **Finish** to save your changes and return to the My Account page, or click **Cancel** to return to the My Account page without saving your changes.

Selecting Your Portal Interface

You can change your portal display to accommodate assistive technologies or slow internet connections.

1. In the portal banner, click **My Account**.
2. On the My Account page, click **Display Options**.
3. Under **Choose Portal Type**, select an interface:

   - **Standard Portal** Choose this option if want to use all the features of the portal and if you do not use assistive technologies.
   - **Assistive Technology Portal (for people with disabilities)** Choose this option if you use assistive technology to browse the internet (for example, screen readers, screen magnifiers, speech recognition software). The portal displays only portlets that are designed to work with assistive technologies.
   - **Low Bandwidth Portal** Choose this option if you have a slow internet connection. The Low Bandwidth Portal loads more quickly than the Standard Portal but does not include images or navigational drop-down menus.

4. When you are done specifying all your display settings, click **Finish** to save your changes and return to the My Account page, or click **Cancel** to return to the My Account page without saving your changes.

Portal Interface Types

Users can change their portal display to accommodate assistive technologies or slow internet connections.

Interface Type	Description
Standard Portal	The fully-featured user interface for the Oracle WebCenter Interaction software. Use it to provide the richest user interface experience for internal and external users. This version does not support assistive technologies.
Assistive Technology Portal	Designed for people with disabilities. It supports only portlets that meet requirements for use with assistive technologies. Section 508 of the Rehabilitation Act is a federal statute requiring federal agencies' electronic and information technology to be accessible to people with disabilities, including employees and members of the public. The federal criteria for web-based technology are based on access guidelines developed by the Web Accessibility Initiative of the World Wide Web Consortium (W3C). Designed to adhere to the federal criteria for web-based technology, the Assistive Technology Portal allows end users with visual disabilities to access the portal through assistive browsing technologies, such as screen readers, screen magnifiers, voice recognition and Braille devices. The interface is text-based with a linear presentation of information, and with no embedded client-side JavaScript or Java applets.
Low Bandwidth Portal	Accommodates users with slower internet connections. This version supports all Oracle WebCenter portlets, but does not support assistive technologies. Remote users have two options for viewing portal pages—the standard version and the Low Bandwidth version. Users can switch from one version to the other during a portal session and the change occurs immediately. The Low Bandwidth Portal provides better performance for end users accessing the portal remotely when network performance is slow due to low bandwidth or heavy traffic. This version presents a user interface with far fewer graphics and no embedded JavaScript or Java applets.

Setting Your Portal Greeting

You can set the greeting text that displays in your portal banner.

1. In the portal banner, click **My Account**.

2. On the My Account page, click **Display Options**.

3. Under **Personalize Your Greeting**, in the **Your greeting** box, type up to 28 characters.

   Note: Your greeting does not change if you change your language display.

4. When you are done specifying all your display settings, click **Finish** to save your changes and return to the My Account page, or click **Cancel** to return to the My Account page without saving your changes.

Specifying How Portal Documents Open

You can specify how documents open when you click a document link in the portal.

1. In the portal banner, click **My Account**.

2. On the My Account page, click **Display Options**.

3. Under **Document Display Options**, select an option:

   • To display the document in a new browser window, select **Open documents in a new window**. Choose this setting if you want to view multiple documents at the same time.
   • To display the document in the current browser window, select **Open documents in the main browser window**.

4. When you are done specifying all your display settings, click **Finish** to save your changes and return to the My Account page, or click **Cancel** to return to the My Account page without saving your changes.

Setting Your My Page Refresh Rate

You can specify how often your My Page is refreshed.

1. In the portal banner, click **My Account**.

2. On the My Account page, click **Display Options**.

3. Under **Page and Portlet Settings**, in the **Your My Page will be updated** drop-down list, select a frequency.

   If you choose **Never**, your My Page is updated only when you manually refresh the page. For instructions on manually refreshing your page, refer to your web browser's online help.

   Note: Portlet content might not be refreshed each time you refresh your My Page; portlet refresh depends on the portlet settings implemented by your portal administrator.

4. When you are done specifying all your display settings, click **Finish** to save your changes and return to the My Account page, or click **Cancel** to return to the My Account page without saving your changes.

Setting Your Portlet Time Out Limit

You can specify how long to wait for a portlet to load on your My Pages.

1. In the portal banner, click **My Account**.
2. On the My Account page, click **Display Options**.
3. Under **Page and Portlet Settings**, next to **Maximum time to wait for a portlet**, select a time out option:

   • If you want your portal administrator to determine how long your My Page waits for a portlet to load, select **Let the portal administrator set this for me**. This is the default setting.

   • If you want to specify how long your My Page waits for a portlet to load, select the option next to the drop-down list, then, in the drop-down list, select the maximum number of seconds you want to wait for a portlet to load before your My Page displays without the portlet.

   If your My Page displays slowly or displays time-out errors, you might want to change the time out setting. If your My Page takes a long time to finish loading, you might want to decrease the portlet time-out. Your My Page will load faster, but portlets might display time-out errors or out-of-date content. If portlets frequently display time-out errors, you might want to increase your portlet time-out. Some portlets need more time to request information from remote computers or databases. If you increase your portlet time-out, your page will load more slowly, but it will be less likely to display time-out errors (time-out errors can still occur if there are problems with the portlet).

4. When you are done specifying all your display settings, click **Finish** to save your changes and return to the My Account page, or click **Cancel** to return to the My Account page without saving your changes.

Enabling Debug Mode

If your portal administrator needs to troubleshoot your portal, you might be asked to enable debug mode.

1. In the portal banner, click **My Account**.

2. On the My Account page, click **Edit User Profile**.

3. Click the **Advanced Settings** page.

   Note: The **Advanced Settings** page is only visible when the administrator enables debug mode in the Portal Server Settings.

4. Select **Enable Experience Rules Debug Mode**.

Editing Locale Settings

Users can change their portal display to accommodate their time zone and locale.

The locale determines:

- The language displayed in the portal interface (portlet names and content display in the language you choose only if those portlets support your chosen language).
- The format for portal entries (including search requests). For example, if you choose British English, the portal displays and expects dates in the DD/MM/YYYY format, whereas in American English, the portal displays and expects dates in the MM/DD/YYYY format.

Note: Only the portal interface and localized objects display in the language you choose. Your personal greeting does not change if you change your locale.

1. In the portal banner, click **My Account ➤ Edit Locale Settings** .

2. In the **Your time zone** drop-down list, choose your time zone.

3. In the **Your locale** drop-down list, choose the language in which you want your portal to display content.

Setting Search Preferences

On the Search Preferences page, you can personalize what your search results look like. You can limit your search by object type and language, specify the number of results you want to see on each page, and manage your saved searches.

1. In the portal banner, click **My Account**, then click **Search Preferences**.

2. Set your search preferences:

- Under **Result Types**, select the types of objects you want to search.

   By default, the portal searches all types of objects.

- Under **Languages**, select the languages you want to search:

  - To search for results in all languages, select **All languages**. This is the default setting.
  - To restrict your search results to just the language you chose on the Locale Settings page, select **Just my default portal language**.

- Under **Number of Results**, in the **Results per page** drop-down list, select the number of search results you want to display on each page.
- Under **Sorting**, in the **Sort results by** drop-down list, select how you want your search results sorted by default.

  You can select a different sort option from the search results page.

Viewing User Profiles

User profiles provide information about users, such as address and position. You can view your information or information for other users.

Your portal administrator controls what information you see in a user profile, but the following categories of information are available by default:

- **General Information** includes general contact information such as name, position, and phone number.
- **Folder Expertise** lists the Knowledge Directory folders for which the user is a related expert. Your portal administrator might add a user to a folder as an expert, or, if you have the appropriate permissions, you can add yourself as expert when you are browsing folders in the Knowledge Directory. To open a listed Knowledge Directory folder, click the folder name.
- **Managed Communities** lists the communities that the user has permission to manage. To view a listed community, click the community name.

Note:

- The Folder Expertise and Managed Communities portlets do not display if your portal uses adaptive layouts.
- If information contained in Folder Expertise or Managed Communities is incorrect, contact your portal administrator.

- To view your user profile, in the portal banner, click **My Account ➤ View User Profile** .
- To view another user's profile, search for the user and click the user's name.

  Note: You can view only those properties to which you have access.

Changing Your Password

You can change your portal account password.

1. In the portal banner, click **My Account ➤ Change Password** .

    Note: In some cases you will not see the change password option. If this is the case, the portal is taking your password from an external source and you must change the password in that system. When you change the password there, it is automatically changed in the portal. If you have questions about where to change your password, contact your portal administrator.

2. In the **Old password** box, type the password you currently use to log in to the portal.

    If you have forgotten your password, contact your portal administrator.

3. In the **New password** box, type a new password.

    Passwords are case-sensitive and must be 5 to 20 characters long.

4. In the **Confirm new password** box, type your new password again.

Setting Login Credentials for External Applications

Your portal administrator might make some external applications available through the portal, such as an employee benefits system. If these external applications require you to log in, you might be able to set your log in and password in the Password Manager.

1. In the portal banner, click **My Account ➤ Password Manager** .
2. For each system or application listed, enter the user identification and password you use to access that application.

About My Pages

My Pages are your personalized view of the portal. You choose the applications, tools, and services (in the form of portlets) that you want to display on each My Page. For example, you might create a My Page that includes a search tool for all the employees in your company and a portlet that displays the most recent news about your company.

Personalizing Your View of the Portal with My Pages

My Pages are your personalized view of the portal. You choose the applications, tools, and services (in the form of portlets) that you want to display on each My Page. For example, you might create a My Page that includes a search tool for all the employees in your company and a portlet that displays the most recent news about your company.

- To view a My Page, in the **My Pages** menu, click the page you want to view.
- To create a My Page, click **Create Page**.

  You can have as many as six My Pages.

- To rename the page or add portlets to the page, click **Edit Page**.

  - If you are editing a My Page that uses an adaptive page layout, the Flyout Editor opens. See *Editing a Page in the Flyout Editor* on page 27.
  - If you are editing a My Page that uses a legacy user interface, the Page Editor opens. See *Editing a Page in the Page Editor* on page 28.

- To change the column layout for the page:

  a) Click 📝 **Edit Page**.

    - If you are editing a My Page that uses an adaptive page layout, the Flyout Editor opens. Continue with Step 2.
    - If you are editing a My Page that uses a legacy user interface, the Page Editor opens. Skip Step 2.

  b) Click **Go to Advanced Editor** to open the Page Editor.

  c) Click ◢📑 **Select Page Layout**, then, in the Select Page Layout dialog box, select the layout you want and click **Finish**.

     Note: Narrow portlets can display in either narrow or wide columns, but wide portlets can display only in wide columns.

- To delete the page, click ⊗ **Delete This Page**.
- Manage portlets using the buttons in the portlet title bar:

  Note: Some portlets do not include title bars or do not include all the buttons described here.

  - To refresh the content in a portlet, click 🔄.
  - To view the help for a portlet, click ❓.
  - To edit preferences for a portlet, click 📝.
  - To collapse a portlet so that only the title bar appears on the page, click ▬.

    To expand the portlet, click ▭.
  - To remove a portlet from the page, click ✖.

Creating a My Page with One Click

You can create a new My Page with one click.

1. Display one of your My Pages.

2. Click 🟢 **Create Page**.
   The new page is created.

3. To add portlets to the page, click 🖉 **Edit Page**.

Editing a Page in the Flyout Editor

You can rename a page, add portlets, recommend portlets, and reposition portlets while viewing the page.

Click 🖉 **Edit Page**. The Flyout Editor appears, enabling you to perform the following actions:

Note: The Flyout Editor appears only if you are viewing an adaptive page layout (not a legacy page layout).

- To rename the page, in the **Change Page Name** box, type the new name.
- To add a portlet to the page, under the portlet name, click **Add to Page**.
  A placeholder for the portlet is added to the page below the Flyout Editor.
- To remove a portlet, under the portlet name, click **Remove**, or click ⊠ in the portlet's title bar.
- To see what a portlet looks like, under the portlet name, click **Preview**.

  From the Preview Portlet page you can perform the following actions:

  - To add the portlet to your page and close the preview, click **Add this portlet**.
  - To view a description of the portlet, click **View Description**. When you are finished, click **Close**.
  - To return to the list of portlets without adding the portlet to your page, click **Close**.

- To view a list of the portlets in a portlet bundle, under the bundle name, click **Open**.
- To add all the portlets from a bundle, under the bundle name, click **Add**.
  A placeholder for each portlet is added to the page below the Flyout Editor.

  Note: You can remove a portlet added as part of a bundle by clicking ⊠ in the portlet's title bar.

- To recommend a portlet to other users:
  a) Under the portlet name, click **Invite**.
  b) In the invitation dialog box, copy the text, and click **Close**.
  c) In your e-mail application, paste the text into an e-mail message and send it.

When other portal users click the URL in your e-mail, they are taken to the portlet preview and given the option to add the portlet to one of their My Pages. Users that do not have permission to see the portlet receive an error message.

- To search for portlets and portlet bundles, in the **Search for Portlets** box, type the text you want to search for and click **Search**.

  For searching tips, see *Using Text Search Rules* on page 62.

  To remove your search criteria, click **Search** again.

- To change the sort order of portlets, in the **Sort By** drop-down list, select an option: Item Name Ascending, Item Name Descending, Date Modified Ascending, Date Modified Descending.
- To page through the list of portlets, click **<< Previous**, **Next >>**, or a particular page number.
- To browse through administrative folders, click **Browse All Folders**.

  Note: This link displays folders that might not contain portlets or portlet bundles.

  To view the portlets and portlet bundles in a folder, click the folder name.

- To reposition a portlet, in the area under the Edit Page section, drag the portlet to the desired position (by clicking the portlet, holding down the mouse button, and moving the mouse), then release the mouse button.

  Each column on the page is represented by a gray box. To change the column structure, click

  Go to Advanced Editor, then click ⬆ Select Page Layout**.

- To close the Flyout Editor, click 📝 **Close**, or, in the Edit Page section, click ❌ or **Close Editor**.

Editing a Page in the Page Editor

You can rename a page; add, delete, or reposition portlets; and select a page layout in the Page Editor.

1. On the page you want to edit, click 📝 **Edit Page**.

   - If you are editing a page that uses an adaptive page layout, the Flyout Editor opens. Continue with Step 2.
   - If you are editing a page that uses a legacy page layout, the Page Editor opens. Skip Step 2.

2. If the Flyout Editor opens, click **Go to Advanced Editor** to open the Page Editor.

- To change the name of your page, type a new name in the **Page Name** box.
- To add portlets to your page, click **Add Portlets**.
- To change the format for the columns on your page, click **Select Page Layout**.
- To see what a portlet looks like, click **Preview**.
- To remove a portlet from the page, click **Remove**.
- To reposition a portlet on your page, drag the portlet to the desired position (by clicking the portlet, holding down the mouse button, and moving the mouse), then release the mouse button.

  Each column on the page is represented by a gray box.

About Communities

Communities are sites within a portal designed for a specific audience or task, such as collaborative projects. The pages, portlets, layout, community preferences, and subcommunities within a community are determined by the community administrator. Although the community administrators determine which portlets are displayed in a community, a portlet itself might allow community members to change the content within each portlet.

You might have communities based on departments in your company. For example, the Marketing department might have a community containing press information, leads volumes, a trade show calendar, and so on. The Engineering department might have a separate community containing project milestones, regulatory compliance requirements, and technical specifications.

You are automatically subscribed to communities based on your group membership. You can also join communities on your own. Some community subscriptions might be mandatory, but you can unsubscribe from those that are not. The communities you are subscribed to appear in the **My Communities** menu. Some mandatory communities might also appear as tabs in the menu area.

Community Menus

The community might include the following menus:

- The community menu displays all the community pages, and—if enabled by the administrator—the Community Knowledge Directory. The community pages display portlets. The Community Knowledge Directory displays the members of the community, any subcommunities of the community, and any other folders and contents the community administrator added.
- **Subcommunities** displays any subcommunities within the current community.

- **Related Communities** displays any communities that are stored in the same administrative folder as the current community.

  This menu only appears if you have access to related communities.

Note: Your portal administrator might use a navigation scheme with customized menu options.

Subcommunities

Subcommunities are separately-secured subsections in a community, which might have a more restrictive security than the main community. For example, you might have a Marketing Community that includes an Advertising Subcommunity. This Advertising Subcommunity might have distinct owners or might be accessible to only a subset of the Marketing Community.

Community Knowledge Directory

The Community Knowledge Directory, if enabled, displays community resources in an organizational structure that is relevant to the community (as opposed to the broader portal audience). It includes a list of community members, displayed in the **Members** folder, and a list of subcommunities, displayed in the **Subcommunities** folder. Community administrators can also create folders that contain links to relevant web pages, community experts, portal documents, or community pages.

Viewing Communities

Communities are sites within a portal designed for a specific audience or task, such as collaborative projects. You might have communities based on departments in your company. For example, the Marketing department might have a community containing press information, leads volumes, a trade show calendar, and so on. The Engineering department might have a separate community containing project milestones, regulatory compliance requirements, and technical specifications.

- To view the communities to which you belong, open the **My Communities** menu.
- To display a community, in the **My Communities** menu, click the community name.
- To display a page in the community, in the community title bar, click the name of the page.
- To view the Community Knowledge Directory, in the community title bar, click **Community Knowledge Directory**.

  This link is available only if the community administrator has enabled the Community Knowledge Directory. The Community Knowledge Directory displays the members of the

community, any subcommunities of the community, and any other folders and contents the community administrator added.

- To view the subcommunities to which you belong, open the **Subcommunities** menu.

  This menu appears only if this community contains any subcommunities. Subcommunities are separately secured subsections of a community. For example, you might have a Marketing community that contains the Advertising Subcommunity. The Advertising Subcommunity could have distinct owners; or only a subset of the Marketing community might be entitled to see the Advertising Subcommunity.

- To view a subcommunity, in the **Subcommunities** menu, click the subcommunity name.

- To join the community you are viewing, click **Join this community**.

  Note: You see this option only if you are not already subscribed to the community.

  Tip: You can also join communities by clicking **My Communities ➤ Join Communities** . For more information on joining communities, see *Joining Communities* on page 33.

- To unsubscribe from a community, click **Unsubscribe from this community**.

  Note: You see this option only if you are a member of this community and only if your membership is not mandatory.

  Tip: You can also unsubscribe from communities by clicking **My Communities ➤ Unsubscribe Communities** . For more information on unsubscribing from communities, see *Unsubscribing from Communities* on page 34.

Joining Communities

You can join a communities that you visit frequently so that they display in the My Communities menu.

1. In the **My Communities** menu, click **Join Communities**.
2. Select the communities you want to join.

   To search for a community, in the **Search for Communities** text box type the text for which you want to search, then click . For searching tips, see *Using Text Search Rules* on page 62.

3. After you have selected all of the communities that you want to join, click **Finish**.

Tip: You can also join a community by viewing the communities and clicking **Join this community**.

Unsubscribing from Communities

If you no longer use a community, you can unsubscribe from it to remove it from your My Communities menu.

1. In the My Communities menu, click **Unsubscribe Communities**.
The Unsubscribe from Communities page lists all of the communities of which you are a member.

Note: Your administrator might have made your membership in some communities mandatory (**Mandatory** appears to the right of the community name). You cannot unsubscribe from mandatory communities.

2. Select the communities from which you want to unsubscribe.

To select all non-mandatory communities, select the box next to **My Communities**.

3. Click **Unsubscribe**.

4. Click **Finish**.

Tip: You can also unsubscribe from a community by viewing the community and clicking **Unsubscribe from this community**.

Recommending Communities

If you find a community you want to recommend to other users, you can send a link to them by e-mail.

1. In the **My Communities** menu, click **Join Communities**.

2. To the far right of the community you want to recommend, click ✉.

3. In the invitation dialog box, copy the text, and click **Close**.

4. In your e-mail application, paste the text into an e-mail message and send it.

When users click the URL in your e-mail, they are taken to the community and given the option to join it. Users that do not have permission to see the community receive an error message.

About the Portal Knowledge Directory

The Knowledge Directory is similar to a file system tree in that documents are organized in folders and subfolders. A folder can contain documents uploaded by users or imported by content crawlers, as well as links to people, portlets, and communities. If your administrator has given you permission, you might also be allowed to add documents to the Knowledge Directory, or submit yourself as an expert on a particular topic.

The default portal installation includes a Knowledge Directory root folder with one subfolder named Unclassified Documents. Before you create additional subfolders, define a taxonomy, as described in the *Deployment Guide for Oracle WebCenter Interaction*. For example, you probably want to organize the Knowledge Directory in a way that allows you to easily delegate administrative responsibility for the content and facilitate managed access with access control lists (ACLs).

When you open the Directory, you see the folders and subfolders to which you have at least Read access. After you have opened a Directory folder, you see additional features: documents, document display options, subfolders, and related objects.

Documents

On the left, you see the documents to which you have at least Read access. Each document includes an icon to signify what type of document it is (for example: web page, PDF, MS Word document), the document name, the document description, when the document was last modified, a link to view additional document properties, and a link that displays the URL to this document (enabling you to e-mail a link to the document). At the bottom of the list of documents, you see page numbers indicating how many pages of documents exist in this folder.

Document Display Options

At the top of the list of documents, you see drop-down lists that let you change how documents are sorted, how many documents are displayed per page, and filter what types of documents are displayed.

Subfolders and Related Objects

On the right, you see the subfolders in this folder, and any objects that the folder administrator has specified as related to this folder.

Note: You see only those folders and objects to which you have at least Read access.

- Under **Subfolders**, you see the subfolders in this folder.
- Under **Related Communities**, you see communities that have information related to the documents in this folder.
- Under **Related Folders**, you see other Directory folders that have information related to the documents in this folder.
- Under **Related Portlets**, you see portlets that have information or functionality related to the documents in this folder.
- Under **Related Experts**, you see the users that are familiar with the documents in this folder (for example, an expert might have written one of the documents in the folder).
- Under **Related Content Managers**, you see the users that manage the documents in this folder and the content sources and content crawlers associated with this folder.

Browsing Documents in the Portal Knowledge Directory

The Knowledge Directory is similar to a file system tree in that documents are organized in folders and subfolders. A folder can contain documents uploaded by users or imported by content crawlers, as well as links to people, portlets, and communities. If your administrator has given you permission, you might also be allowed to add documents to the Knowledge Directory, or submit yourself as an expert on a particular topic.

When you open the Directory, you see the folders and subfolders to which you have at least Read access.

- To edit the directory (add or edit folders), click ✎ **Edit Directory**.

Note: You must have the Edit Knowledge Directory activity right to see this button. You must also have at least Edit access to a folder or document to be able to edit the folder or document.

- To open a folder or subfolder, click its name.

  Note: If the folder includes a description, it appears as a tooltip. To view the description, place your mouse over the folder name.

  After you have opened a Directory folder, you see the additional features described next.
- To open a document, click its name.
- To view the properties of a document, click the **Properties** link under the document description.
- To tell other portal users about a document:
  a) Under the document description, click **Send Document Link**.
  b) In the **Document Link** dialog box, copy the text, then click **Close**.
  c) In your e-mail application, paste the text into an e-mail message and send it.

     When other portal users click the URL in your e-mail, the document opens. If a user does not have permission to see the document, an error message is displayed.

- To submit a document to the portal, click **Submit Documents**.

  Note: You must have at least Edit access to the folder and at least Select access to the content source that provides access to the document to be able to submit a document.

- To view another page of items, at the bottom of the list of documents, click a page number or click **Next >>**.
- To change the sort order of documents between ascending and descending, in the **Sort** by drop-down list, select the desired option: **Document Name Ascending** or **Document Name Descending**.
- To change the number of documents that are displayed per page, in the **Items per page** drop-down list, select the desired number.

  By default, 20 items are shown per page.

- To filter the documents by document type (for example, MS Word documents or PDF documents), in the **Show only item type** drop-down list, select the desired document type.
- To open a subfolder, under **Subfolders**, click the subfolder name.

  Note: Beneath the banner, you see the hierarchy for the folder you are viewing (sometimes referred to as a breadcrumb trail). To move quickly to one of these folders, click the folder's name.

- To create a subfolder in this folder, under **Subfolders**, click 🗋 **Create Folder**. In the **Create Document Folder** dialog box, type a name and description for the folder, and click **OK**.
- To view a related community, under **Related Communities**, click the community name.

  Note: If you have at least Select access to the community, you can join the community.

- To open a related folder, under **Related Folders**, click the folder name.
- To preview a related portlet, under **Related Portlets**, click the portlet name.

  Note: If you have at least Select access to the portlet, from the portlet preview page, you can add the portlet to one of your My Pages.

- To view the user profile for a related expert, under **Related Experts**, click the user's name.

  Note: If you have the Self-Selected Experts activity right, and are not already listed as an expert, click 🧍 **Add Me** to add yourself as an expert on the folder's topic.

- To view the user profile for a related content manager, under **Related Content Managers**, click the user's name.

Using Simple Submission to Submit or Upload Documents to the Portal Knowledge Directory

With the proper permissions, you can submit documents to the Knowledge Directory. Depending on your portal configuration, you might also be able to upload a file to the Knowledge Directory. When you upload a file, it is copied from the remote repository into the portal's document repository and a pointer is created to that copied file.

Before you submit or upload a document to the Knowledge Directory:

- Make sure the language of the document you are submitting matches the language specified as your locale on the **Edit Locale Settings** page of **My Account**. For example, if your default locale is Japanese, the document you are submitting must also be in Japanese. If you are submitting a document in a language different from your default locale, either change your default locale to match the language of the document before you submit it, or, if you have permission to edit the Knowledge Directory, you can use Remote Document or Web Document submission to select a different language.

- If you are using Netscape 7.1, make sure the ANSI character set of your client matches that of the name of the file that is being uploaded. The ANSI character set is determined by the default system locale configuration of your client. For instructions on setting the default locale, refer to your operating system documentation.

To submit or upload a document to the Knowledge Directory you must have the following rights and privileges:

- At least Edit access to the parent folder (the folder that will store the document)
- At least Select access to the content source that provides access to the location where the document is stored

Note: If you want to use a content type other than the default content type associated with the content source, if you want to submit a document to more than one Knowledge Directory folder, or if you want to submit a document in a language different from your default locale, use Remote Document or Web Document submission, available when editing the Knowledge Directory.

1. Click **Directory**.
2. Open the folder in which you want to place the document.
3. Click ![icon] **Submit Documents**.
   The Submit a Document dialog box opens.

   If you are editing the Knowledge Directory, you open the Submit a Document dialog box by selecting **Simple Submit** in the **Submit Document** drop-down list on the right.

4. In the **Document source** drop-down list, accept the default document source or select another.

   The document source tells the portal how to find the document you are submitting.

   Note: If you are uploading a file, you must select **Content Upload**.

5. Specify a file by performing one of the following actions:

   - If you are submitting a web document, in the **URL** text box, type the document's URL.
   - If you are submitting or uploading a file, specify a file by performing one of the following actions:
     - Type the UNC path to the document in the **File path** text box.

       If you are leaving the file in the remote location, you must type a network path (for example, \\myComputer\myFolder\myFile.txt). If you are uploading the file, the path can be a local path (for example, C:\myFolder\myFile.txt) or a network path.

     - Click **Browse** to navigate to the location of the file you want to submit.

If you are leaving the file in the remote location, you must supply a network path to the file, and therefore, you cannot browse your local drives; you must browse the network to your computer and then to the location of the file. If you are uploading the file, you can browse to local drives or network drives.

Note:

- Depending on how the administrator configured the content source, the **Browse** button might not appear, therefore you might not be able to browse to the file. If you do not see a **Browse** button, type the path in the **File path** text box.
- If the **Browse** button does display but you cannot browse to the folder where the file you want to submit is located, the content source you chose might not have the necessary privileges to access the file location. Click **Cancel** and resubmit the file using a different content source.

6. If desired, override the default name or description.

- To override the default name, select **Use this name** and, in the text box, type the name.
- To override the default description, select **Use this description** and, in the text box, type the description.

Once the folder administrator (one who has Admin access to the folder) approves your submission, links to the document you submitted or uploaded appear in the Knowledge Directory.

Searching for Documents or Objects

You can search for documents or objects using the portal banner, using the Portal Search portlet, using advanced search, or using federated search. Each method of search uses the same text search rules.

Note: Only those documents or objects to which you have at least Read access appear in your results.

- To search for documents or objects through the portal banner, type your search string in the box in the portal banner, and click **Search**.
- To go directly to the result that your portal administrator has set as the top best bet for a term, without first seeing all the search results, type the top best bet operator (>) followed by your search string and click **Search**, or type your search string and click ⚬.

  Note: If no top best bet has been set for the term, the regular search results appear.

  Note: The top best bet button (⚬) is available only if enabled by your portal developer.

- To search for documents or objects using a saved search, use the Portal Search portlet.
- To search for documents or objects using metadata properties and location, click 🔍 **Advanced Search**.
- To search other content, portals, and web search engines, click 📁 **Federated Search**.

  Note: The 📁 **Federated Search** button is available only if enabled by your portal developer.

Searching for Objects or Documents Using Advanced Search

You can perform an advanced search, using metadata properties and location, to find objects or documents.

In the portal banner, click 🔍 **Advanced Search**.

- To search for text in the name or description of an object or document, type the text you want to search for in the **Search** for text box.

    You can use the text search rules.

- To search for property values, click ➕📄 **Add Criteria**, and specify the property criteria in the boxes that appear:

    a) In the first drop-down list (property), select the searchable property for which you want to filter the values.

    b) In the second drop-down list (operator), select the operator to apply to this condition.

    This list will vary depending on the property selected:

    - For any text property you can search for a value that contains your search string (Contains), or you can search for properties that are blank (Contains No Value).

        Note: To exclude results with particular values, select **Contains**, then type "not" followed by words that you want to exclude from your search. For example, if you want to search for documents about retirement benefits, excluding pension plans, then type "retirement benefits" in the Search for text box, select Contains from the drop-down list, and type "not pension plan" in the text box.

    - For any date property you can search for a value that comes after, comes before, is, or is not the date and time you choose or for a value that occurs in the last number of minutes, hours, days, or weeks that you specify.

    - For any number property you can search for a value that is greater than, is less than, is, is not, is greater than or equal to, or is less than or equal to the number you enter in the text box.

    c) In the **Value** text box, enter the value the property must have, or not have, depending on which operator you selected.

Note: If you are searching for a text property, you can use the text search rules.

- To remove a property condition, select the condition and click ✕ (next to ⁺📄 **Add Criteria**).
- Specify how you want your search criteria handled:

  - To meet all the conditions you define, select **All Criteria**.

    Selecting All Criteria is equivalent to using AND.

  - If you want your search results to meet at least one of the conditions you define, select **Any Criterion**.

    Selecting Any Criterion is equivalent to using OR.

- To restrict your search to specific Knowledge Directory folders, click ⁺📁 **Add Document Folder**. In the Select folder for search dialog box, select the folders you want to search and click **OK**.

- To remove folders from your list, select the folders and click ✕ (to the right of ⁺📁 **Add Document Folder**).

  To select or clear all folder boxes, select or clear the box next to **Folder Names**.

- Specify whether you want to include subfolders.

  By default, the portal searches subfolders. To exclude subfolders from your search, clear the box next to **Include subfolders**.

- To specify the number of results to display on a page, in the **Results per page** drop-down list, choose a value.
- To restrict your search to a specific language, in the **This language only** drop-down list, choose a language.
- To limit your search to specific object types, in the **Result Types** list, select the object types you want to search.

  To select or clear all object type boxes, select or clear the box next to **Object Type**.

- To set all search conditions back to the defaults, click **Clear**.
- To perform your search, click **Search**.

Complex Property Search Example

You can use multiple property criteria to define complex property searches. For example, if you want to find documents published after a certain date by

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a specific branch of a company, you could set the property criteria to the following values:

- First Criterion:

    - Property = Object Created
    - Operator = Comes After
    - Value = December 30, 2003

    Your search results would be limited to objects created after December 30, 2003.

- Second Criterion:

    - Property = Company
    - Operator = Contains
    - Value = Company A

    Your search results would be limited to objects where the company property contains Company A.

- Third Criterion:

    - Property = Address
    - Operator = Contains
    - Value = San Francisco

    Your search results would be limited to objects that contain San Francisco in the address.

- You would also want to limit your Result Types to Documents, so that only documents were returned in your results.

Searching Other Content, Portals, or Web Search Engines with Federated Search

You can use federated search to search for content in web search engines (for example, Google or AltaVista), other portals, or other collections of information (for example, a Lotus Notes collection or a set of customer service incident reports).

Your portal administrator must have configured an outgoing federated search and your portal developer must have enabled the 🐟 **Federated Search** button in the portal banner.

1. In the portal banner, click 🐟 **Federated Search**.
2. In the **Search for text** box, type the text you want to search for.
3. Select the number of results you want returned per location.

   By default, 5 results per location are returned. To change this number, select a new number in the **Number of results per location** drop-down list.

4. Select the locations you want to search.

   • To select particular search locations, select the locations.
   • To select all search locations, select the box next to **Search Location**.
   • To save your search location settings, select **Always search these locations for me**.

5. Click **Search**.

Viewing Search Results from a Banner Search

When you perform a banner search, each item returned includes an icon to signify what type of document or object it is (for example, 🌐 signifies a web page and 👤 signifies a user), the item name, the item description, when the item was last modified, and a link to view additional item properties.

• To view a result, click its name.

If you click a...	You see...
Knowledge Directory folder	The contents of the folder
Document	The document
Community	The home page for the community
	Note: You can join the community while viewing it.
Community page	The community page
	Note: You can join the community while viewing it.

If you click a...	You see...
Portlet	A preview of the portlet
	Note: You can add the portlet to a My Page while previewing it.
User	The user's profile

- To view the properties of an item, click the **Properties** link under the item description.
- If your search returns more than one page of results, click a page number or click **Next >>** to view additional results.
- To change the sort order of your results, in the **Sort by** drop-down list, select the desired option:

  - **Relevance** sorts your results according to how closely they match your search query.

    Note: Best bets are only shown in search results when sorting by relevance.

  - **Name** sorts your results alphabetically by name.
  - **Last Modified Date** displays your results in the order in which they were most recently edited.

- To change the number of results that are displayed per page, in the **Items per page** drop-down list, select the desired number.
- To filter your results by type (for example, documents, communities, portlets), in the **Show only item type** drop-down list, select the desired item type.
- To edit the results to which you have at least Edit access, click ✎ **Edit**.

  Note: You must have the proper permissions to see the ✎ **Edit** button. You must have at least Edit access to some of the results. For documents or document folders, you must have the Edit Knowledge Directory activity right. For communities, community pages, portlets, or users, you must have the Access Administration activity right. If you have only the Edit Knowledge Directory activity right, you must filter your results to display only **Documents in the Directory** or **Document Folders**. If you have only the Access Administration activity right, you must filter your results to display only **Communities**, **Community Pages**, **Portlets**, or **Users**.

Saving a Search

You can save a search and access it later through the Portal Search portlet.

Note: Sort order is not saved when you save your search query.

1. Run a search.
2. On the search results page, click ⬛ **Save this Search**.
3. In the dialog box, type a name for this search and click **Save**.
4. To add the Portal Search portlet to your My Page, click the link in the dialog box (**Click here to add the portlet**).

   You can run and manage your saved searches through the Portal Search portlet. You can also manage your saved searches through the Search Preferences page.

5. Click **Close Window**.

Managing Your Saved Searches

On the Search Preferences page you can rename or delete your previously saved searches.

1. In the portal banner, click 👤 **My Account**, then click **Search Preferences**.
2. Under **Saved Searches** manage your previously saved searches:

   • To rename a saved search, edit the saved search name in the box.
   • To delete a saved search, select **Delete** next to the search you want to delete. When you click **Finish**, that search will be deleted.

3. When you are done, click **Finish** to save your settings, or click **Cancel** to revert to your previous settings.

Refining Your Search Results

You can refine your search results by filtering items by type or searching again within your results.

Run a search.

- To search within your results:
  a) In the drop-down list below the portal banner, select **Within results**.
  b) In the text box, type the text for which you want to search.
  c) Click **Search**.

- To filter your results by type (for example, documents, communities, portlets), in the **Show only item type** drop-down list, select the desired item type.

Default Behavior of Search Service

This appendix describes the default behavior of the portal searches.

About the Different Types of Search

The portal provides basic and advanced search tools for typical and advanced users, respectively. The fundamental search syntax and behavior are the same in basic and advanced search, but basic search adds automatic broadening, ranking features, and syntax correction. The following table specifies the search type implemented in the search tools available through different areas of the portal.

Portal Area	Search Type	Description
Banner search	Basic	Searches the following portal objects: banner fields, the Knowledge Directory, portlets, communities, users, Oracle WebCenter Collaboration items, and Publisher items.
Advanced search	Advanced	Allows composition of complex queries on specific document or object properties. Allows searches on date fields as well as text fields. Allows restriction to specific object type. Advanced search also enables searching of all (or any combination of) indexable portal objects, including many which are not searched

Portal Area	Search Type	Description
		in banner search, such as content crawlers, jobs, and web services.
Federated Search	n/a	Federated search allows you to query multiple search web services and receive collated results. Portal search can be included as one of the search services. The portal search option from this page behaves similarly to basic search, except only documents in the Knowledge Directory are searched. Spell correction, Best Bets, and other customizations made with the Search Results Manager do not apply.
Object selection	Basic	Search functionality enables end users to search for portlets when adding portlets to pages or search for communities when joining communities.
Administrative object search	Basic	Administrators can search the Administrative Objects Directory, optionally filtering by folder and object type. Search for specific kinds of portal objects is also integrated into the creation of various kinds of administrative objects. For instance, when creating a remote content crawler, the administrator is presented with the option of searching the available content source objects.
Filters	Advanced	Allows you to create an advanced search query that documents must match to be allowed into a particular folder in the Knowledge Directory.
Snapshot Query	Advanced	A search query that allows you to specify conditions for searching portal objects and, optionally, display the results in a Content Snapshot Portlet and/or e-mail the results to users. You can limit your search by language, object type, folder, property, and text conditions.

Elements of Search Syntax

There are several syntax elements that work together in search.

About Operator Modes

The Search Service parses queries to determine which operator modes to use for the query.

Bag of Words Mode

If the query does not include any search operators (+/-, AND, OR, NEAR, etc.), the Search Service parses the query in Bag of Words mode. Each word in the query must be present in all of the search results; the Boolean AND operator is implicit.

Query Operators Mode

If the query includes query operators, the Search Service parses the query in Query Operators mode.

Query operators AND, OR, NOT, and NEAR are spotted without any special marking (for example, cat AND dog), but all other operators must be surrounded by angle brackets (for example, <WORD>) to be recognized as having special meaning.

A query that contains three or more terms and an operator is parsed as if the terms on each side of the operator were quoted phrases.

Example: `Search Service and Notification`

This query is parsed as: `"Search Service" AND Notification`

Search operators are localized for the following European languages: English, Danish, Dutch, Finnish, French, German, Italian, Norwegian (Bokmal), Norwegian (Nynorsk), Portuguese, and Spanish. If you put angle brackets around the operators, the English versions are also recognized. For example, in the Spanish locale, the following queries are equivalent: `perro Y gato`, `perro <AND> gato`, and `perro gato`. However, `perro AND gato` is not equivalent in the Spanish locale, because AND is not surrounded by angle brackets.

Anything enclosed in angle brackets but not recognized as one of the supported operators is ignored.

Internet Style Mode

If the query includes operators common to internet search engines such as AltaVista and Google, the Search Service parses the search in Internet Style mode. All terms preceded by a plus (+) are required. All terms preceded by a minus (-) are excluded. If at least one term is preceded by a +,

then any "plain" terms not preceded by a + or - are used to boost ranking of results, but are not required. For example, consider the following query: `+dog -cat bird`

This query returns documents that contain dog but do not contain cat, and ranks documents with both dog and bird highest. Compare this to a similar query: `bird -cat`

This query returns documents that contain bird but do not contain cat. Absent any + terms, the plain term bird is treated as a required term.

Search String Operators

Operator	Description	Example Search Text	Example Search Results
<AND> Alternative: AND, & (ampersand)	Connects two terms that must both be included in each item returned.	holiday <AND> schedule	Holiday Schedule
<OR> Alternative: OR, ACCRUE, ANY, | (vertical bar), , (comma)	Connects two terms where at least one must be included in each item returned.	holiday <OR> vacation	Holiday Schedule, Christmas Holiday Party, Scheduling Vacation
<NOT> Alternative: NOT, AND NOT	Term must not appear in items returned.	holiday <NOT> vacation	Holiday Schedule, Christmas Holiday Party
<NEAR/N> Alternative: NEAR	Terms must appear within N words of each other, regardless of order, in items returned.	early <NEAR/10> retirement	Plan early for your retirement
<ORDER>	Both terms must appear in items returned, and the first term must precede the second term.	song <ORDER> bird	song bird (not bird song)

Operator	Description	Example Search Text	Example Search Results
<WORD>	Turns off stemming, alternate case, and spell correction.		
<PHRASE> Alternative: Surround terms in " (double quotes)	Both terms must appear sequentially, in a phrase in items returned.		
<SENTENCE>	Same as <NEAR/10>.		
<PARAGRAPH>	Same as <NEAR/50>.		
+ (plus)	Term must appear in the items returned.		
- (minus)	Term must not appear in the items returned.		
* (asterisk)	The wildcard specifies that the result must match 0 or more characters at the beginning or end of a word.	sub*	subdirectory, subject, subjective
> (right angle bracket)	The top best bet operator brings the user directly to the top best bet for a term, such as a community, document, or portlet.	>HR	You are navigated to the HR Community.

There are certain circumstances in which a user can unintentionally invoke a more advanced search mode by inadvertently using operators. Examples include the following queries:

Query	Equivalent to...
The young and the restless	"the young" <AND> "the restless"
File not found	file <AND> <NOT> found
Error -217439239	Error <AND> <NOT> 217439239

In each of these examples, enclosing the query in double quotes yields the desired effect.

Precedence and Parentheses

The Internet Style mode operators '+' and '-' take precedence over the other search operators. For example, `+big dog <order> cat` matches all documents that contain the term big, boosting the ranking of any documents that contain any of the three terms dog, or cat.

Within query operators mode, the operators have the following precedence classes, from greatest to least:

1. NEAR, ORDER, PHRASE, SENTENCE, PARAGRAPH
2. NOT
3. AND
4. OR

Parentheses can be used to override operator precedence. The following two queries are equivalent (the parentheses do not effect the semantics of the search).

- `a and b near c or d`
- `(a and (b near c)) or d`

This search matches documents that meet one of two conditions:

- The document contains the term d
- The document contains the terms a, b, and c, with b and c in close proximity

On the other hand, the parentheses in the following query override the default operator precedence:

`a and b near (c or d)`

This search matches documents containing the terms a and b and either c or d, where b is in close proximity to c or d.

Punctuation

Punctuation is treated specially in searches.

The following rules describe the interpretation of punctuation characters.

- Quotation marks are always interpreted as operators signifying a quoted phrase. It is therefore impossible to search for a quotation mark (there is no escape character, such as a backslash, which would remove the special significance of the quotation marks).

- All other punctuation loses any special operator significance inside of quotation marks. (The same holds for all operators, such as AND.)
- Outside of quotation marks, punctuation either has significance as an operator, or it is ignored. The following punctuation has special operator significance outside of quotation marks:
  - Left and right angle brackets(<>) enclose operators, as in <NEAR>
  - Comma (,) is treated as OR
  - Ampersand (&) is treated as AND
  - Vertical bar (|) is treated as OR
  - Plus (+) and minus (-) are interpreted as Internet Style syntax
  - Asterisk (*) is interpreted as a wildcard character

- Punctuation is always split apart from adjoining alpha-numeric characters. For example, an advanced search for `bag-of-words` matches documents containing the three tokens bag, of, and words.
- Underscore is treated as punctuation. This means you must enclose a term containing an underscore in quotes to get an exact match (for example, `"HOST_NAME"`matches HOST_NAME, but without the quotes, it also matches HOST NAME).

  Symmetrical punctuation tokenization takes place on text stored in the index, so the explosion of a query term such as bag-of-words does not prevent the search from matching a document containing the phrase bag-of-words.

Note:

- Terms generated by wildcard expansion are not stemmed.
- Wildcard expansion is performed internally by replacing each pattern with a limited list of terms that match the pattern before actually executing the query. Very broad wildcard expressions might therefore return a partial list of results.

Case Sensitivity

All searches are case-insensitive, except when the <WORD> operator is used.

Table 3: Case Sensitivity Examples

Query	Matches
Oracle	Items containing Oracle, oracle, or any other case variant.

Query	Matches
`"Search Service"`	Items containing the phrase Search Service or any other case variant.
`<WORD> Oracle`	Items containing Oracle, but not oracle or ORACLE.

Stemming

Word stemming is applied to all individual terms in the search query, except within quoted phrases, or when the <WORD> operator is used. The stemming of query terms means that a query term will match documents containing morphological variants of that term. For example, a search for `dogs AND go` would match a document containing the terms dog and went. (This example applies to English; stemming employs language-specific information and depends on the user's locale and the language used to index the document.)

Note:

• Terms generated by wildcard expansion are not stemmed.
• Stemming is not applied to terms within a quoted phrase.

Wildcards

The wildcard operator (*****) is used to search for partial matches (prefixes, suffixes, and substrings) of indexed terms.

Wildcard expansion is performed internally by replacing each pattern with a limited list of terms that match the pattern before actually executing the query. Very broad wildcard expressions might therefore return a partial list of results.

Note:

• Terms generated by wildcard expansion are not stemmed.
• Wildcards cannot be used within quoted phrases.

Table 4: Wildcard Examples

Search Type	Query	Matches
prefix	`cat*`	Finds all documents containing terms that start with cat, such as caterpillar.
suffix	`*cat`	Finds all documents with terms that end in cat, such as tomcat.
substring	`*cat*`	Finds all documents with terms that contain cat, such as tomcats. Mid-string wildcard expressions must contain at least three characters (for example, *abc* is legal but *bc* is not).

Quoted Phrases

A quoted phrase in the user search query matches only documents that contain the given sequence of terms. For instance, a search for `"big dog"` will not match a document that contains the terms big and dog if it does not contain the phrase big dog.

Note:

- Stemming is not applied to terms within a quoted phrase.
- Wildcards cannot be used within quoted phrases.

Thesaurus Expansion

Thesaurus expansion allows a term or phrase in a user's search to be replaced with a set of custom related terms before the actual search is performed. This feature improves search quality by handling unique, obscure, or industry-specific terminology.

Thesaurus expansion has the following characteristics:

- It is applied to each term in a basic search.
- It is applied in all three search modes (Internet Style, Query Operators, and Bag of Words).
- It is not applied to quoted phrases.
- If a term is expanded by a thesaurus entry, then it is not eligible for automatic spelling correction.

- Unlike automatic spell correction, which is applied only as a fallback when the non-corrected terms do not match any documents, thesaurus expansion is always applied to all individual search terms.

How Language Settings Apply to Search

Documents and portal objects are indexed with a language setting that determines how word breaking and stemming are applied. When a user issues a search query, word breaking and stemming are applied according to the user account locale settings. Search results are best when the language used for the search matches the language of the documents being searched. However, searches are normally applied to documents in all languages. Cross-language searches do not benefit from localized stemming and word breaking, but can still return useful results.

The advanced search page offers the ability to restrict searches to a particular language.

- The user account search preferences give the option of returning only documents that were indexed using the language of the locale.
- Portal objects can have localized names and descriptions. Basic searches are performed against the default object names and descriptions and the names and descriptions of the locale.

When searching portal content via the Search box in the portal banner, the text of the query is processed using the language setting of the user interface. If the portal interface is German, the query is tokenized and stemmed using German language rules, providing optimal search results for documents indexed using German linguistic rules.

If the search collection contains documents in other languages, you can still retrieve them with a query using the appropriate text (assuming the user interface permits entry of the necessary characters). Typing English words into the search box of a portal using a German interface applies German linguistic rules to the query text. Because English stemming is not used, the query is not able to match alternate English word forms; however, English language documents containing the entered words are retrieved.

Although you can enter Asian language text into a European language search box (if a compatible character encoding is used), you should limit the text to a single word or manually separate words with white space to be able to match Asian content in the search collection.

The Advanced Search page provides additional functionality for searching in a multi-language document collection. A pop-up list allows the user to select the language to use for query processing. Linguistic rules for tokenizing and stemming the selected language are used when processing the query text. Among other things, this means that Asian text can be entered without unnecessary white space.

The query operators recognized by Simple Search and Advanced Search are sensitive to the language setting. For example, the AND operator can be specified as "UND" when the query is processed as German. Localized operators are available for the following languages: English, Danish, Dutch, Finnish, French, German, Italian, Norwegian (Bokmal), Norwegian (Nynorsk), Portuguese, and Spanish. All other languages use English operators.

Search Service Language Support

The portal provides support for 61 languages.

Of the languages supported by the portal, the following languages include support for word stemming and compound decomposition. This additional information is used to enhance results of the full-text index.

Chinese (Simplified)	German	Norwegian (Bokmal)
Chinese (Traditional)	Greek	Polish
Czech	Hungarian	Portuguese
Danish	Italian	Russian
Dutch	Japanese	Spanish
English	Korean	Swedish
Finnish	Norwegian (Bokmal)	Turkish
French		

The following languages are supported at a reduced level.

Afrikaans	Gallegan	Marathi
Albanian	Hebrew	Persian
Arabic	Hindi	Romanian
Basque	Icelandic	Serbian
Belarusian	Indonesian	Serbian-Croatian
Bengali	Irish	Slovak
Bulgarian	Kalaallisut	Slovenian
Catalan	Konkani	Swahili
Cornish	Latvian	Tamil

Croatian	Lithuanian	Telugu
Esperanto	Macedonian	Thai
Estonian	Maltese	Ukranian
Faeroese	Manx	Vietnamese

Using Text Search Rules

When you search for text, you generally can just type the text you are looking for (the search string). However, there are a few rules you should be aware of:

Note: Search strings are case-insensitive; that is, uppercase A is the same as lowercase a.

- To find objects or documents containing all terms in your search string, separate your terms with spaces.

    This is the same as using AND.

- To find objects or documents containing one or more of the terms in your search string, separate your terms with commas.

    This is the same as using OR.

- To search for an exact phrase, type quotation marks (") around the phrase.
- To specify that a term must be included in each result, type a plus (+) in front of the term.
- To exclude a term from the results, type a minus (-) in front of the term.

    Note: Do not include a space after the plus or minus.

    Note: Do not use the plus or minus in the same search with other search string operators.

Search Examples

The descriptions of searches below do not include any of the query expansion or ranking techniques that are employed in basic search. Except where otherwise noted, all matches are case-insensitive.

Query	Expected Behavior
Dog	Searches for documents containing any stem variant of Dog.
<WORD> Dog	Searches for documents containing Dog as specified exactly with no stemming or lowercasing. This is the only case-sensitive form of search.
Big <PHRASE> Dog	Searches for documents containing the exact phrase big dog without stemming.
"Big Dog"	Same as Big <PHRASE> Dog.
cat AND dog	Searches for documents containing stem variants of cat and dog. Equivalent to cat <AND> dog.
cat <ALL> dog	Same as cat AND dog.
cat OR dog	Searches for documents containing stem variants of cat or dog.
cat, dog	Same as cat OR dog.
cat <ANY> dog	Same as cat OR dog.
cat <ACCRUE> dog	Same as cat OR dog.
cat NOT dog	Searches for documents containing stem variants of cat but not containing stem variants of dog.
cat AND NOT dog	Same as cat NOT dog.
cat NEAR dog	Finds stem variants of cat occurring near dog (default is within 25 words).
cat NEAR/15 dog	Finds stem variants of cat within 15 words of dog.
cat <ORDER><NEAR/15> dog	Finds stem variants of cat within 15 words before dog. Can also use more convenient syntax cat <ORDER NEAR/15> dog.
cat <ORDER> dog	Finds stem variants of cat anywhere before dog.
cat <SENTENCE> dog	Finds stem variants of cat within 10 words of dog.
cat <PARAGRAPH> dog	Finds stem variants of cat within 50 words of dog.
cat <XYZ> dog	Finds stem variants of cat and dog. The unsupported operator XYZ is ignored.

Query	Expected Behavior
cat*	Finds all documents containing terms that start with cat, such as caterpillar.
*cat	Finds all documents with terms that end in cat such as tomcat.
cat	Finds all documents with terms that contain cat such as tomcats. Mid-string wildcard expressions must contain at least three characters (for example, *abc* is legal but *bc* is not).
dog *	Finds documents containing stem variants of dog. The singleton wildcard is treated as stray punctuation.
dog cat bird	Finds documents containing stem variants of all three terms, dog, cat, and bird. (Bag of Words mode)
big dog AND bird	Finds documents containing the phrase big dog, and stem variants of the term bird. (Query Operators mode with implicit phrase construction)
dog cat +bird	Finds documents containing stem variants of bird. The rank is boosted for documents containing stem variants of dog or cat. The words dog and cat are not joined into a phrase in Internet Style mode.
+dog -cat bird	Finds documents that contain stem variants of dog but do not contain stem variants of cat, and ranks documents with both dog and bird highest.
bird -cat	Finds documents that contain stem variants of bird but do not contain stem variants of cat.
bag-of-words	Searches for documents containing stem variants of the three terms: bag, of, and words. Punctuation marks are treated as spaces when quotation marks are not present.
"Mr. Jones"	Searches for the phrase mr. jones. Punctuation marks are considered part of the search string if they are included within quoted phrases.

How Search Results Are Ranked

Search results are ranked according to relevance, by default. There are several factors that determine relevance.

How Term Frequency Factors in Relevance

The number of times a query term (or its stemmed and case variant forms) appears in a searchable item has a large influence on the relevance ranking of the item. All other things being equal, items which contain more instances of a query term will rank higher than items containing fewer instances. This is known as term-frequency-based ranking.

About Metadata (Field) Weighting

Basic searches are performed across several document fields, and some fields are weighted higher than other fields, so that, for instance, a match on an object name ranks higher than a match on an object description. By default, the fields searched are name, description, and full-text content.

How Phrases and Proximity Factor in Relevance

In basic search, Bag of Words mode employs special relevancy ranking features which emphasize phrase and proximity matches with the search phrase, even though the user did not employ quotes or proximity operators.

The search phrase terms are used to generate three queries:

1. All words joined together as a single phrase
2. Stem variants of all words and all quoted phrases <ORDER><NEAR> each other
3. Stem variants of all words and all quoted phrases joined together with AND

The three queries combined with the OR operator into a single query, and the relevance ranking are designed to ensure that the results from group 1 always rank above group 2, which rank above group 3.

For example, if you enter `"san francisco" hotels`, the following queries would be generated:

- "san francisco hotels"
- "san francisco" <ORDER><NEAR> hotels

- "san francisco" AND hotels

The search results pages for banner and advanced search allow you to sort the search results by last-modified date, folder, or object type.

About Basic Search Behavior

Basic search adds some special features in order to increase the chances that a search will return relevant results.

Basic search has several characteristics:

- In basic search, if a user search query causes syntax errors in Internet Style mode or query operators mode, it is automatically retried in Bag of Words mode to be as forgiving as possible of user error. For example, if you enter dog and, this query would cause a syntax error in Query Operators mode, because it is missing the right-hand operand to and. The query would then be passed to Bag of Words mode, which would attach no special operator significance and would therefore retrieve documents containing dog and and.
- Term proximity can boost the relevancy ranking in basic search.
- Automatic spelling correction is applied only in basic search.

About Advanced Search Behavior

Advanced search behavior is intended to support complex, precise queries. Therefore it generally does not employ the automatic broadening features of basic search, such as broad cross-field searching or automatic spell correction. Stemming, however, is applied in advanced search.

The Text Search portion of advanced search will search across name, description and full text content. Additional property criteria are applied only to the fields specifically selected in each criterion.

User queries that cause syntax errors in Internet Style mode or Query Operators mode will display an error message in the user interface; the search will not fall back to Bag of Words mode.