
PeopleSoft Enterprise Portal 9.1 PeopleBook: Collaborative Workspaces

September 2009

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PeopleSoft Enterprise Portal Preface

This preface discusses:

- About PeopleSoft Enterprise Portal.
- Using this PeopleBook.
- Related PeopleBooks.
- PeopleBooks and the PeopleSoft Online Library.

About PeopleSoft Enterprise Portal

This section discusses:

- PeopleSoft Portal Solutions product family.
- PeopleSoft Enterprise Portal feature overview.
- PeopleSoft Enterprise Portal and PeopleTools.

PeopleSoft Portal Solutions Product Family

This section discusses the products that are part of the PeopleSoft Portal Solutions product family:

- PeopleSoft Enterprise Portal.
- PeopleSoft Community Portal.
- PeopleSoft Enterprise Internal Controls Enforcer.

PeopleSoft Enterprise Portal

Oracle's PeopleSoft Enterprise Portal is a world-class portal solution with many robust content and collaborative features. The PeopleSoft Enterprise Portal is ideal for customers wishing to deploy an unlimited number of communities across enterprise that focus on PeopleSoft application business processes.

PeopleSoft Enterprise Portal 9.1 contains a rich set of Web 2.0 features. For instance, collaborative workspaces and related content services can be keyed to PeopleSoft application transactions providing contextually relevant collaboration.

PeopleSoft Enterprise Portal 9.1 provides these important new features:

- Blogs.
- Feed publishing.

- Related content services—specifically, the Related Discussion service, the Related Links service, and the Related Tags service.
- Tagging (also known as social bookmarking).
- Wiki content.

These new features add to the existing features already present in PeopleSoft Enterprise Portal:

- Action items
- Collaborative workspaces
- Community calendars
- Context Manager
- Discussion forums
- Document management
- Polls and surveys
- Resource Finder
- Searches and saved searches

See "[PeopleSoft Enterprise Portal Preface](#)," [PeopleSoft Enterprise Portal Feature Overview](#), page xi.

PeopleSoft Community Portal

Oracle's PeopleSoft Community Portal joins PeopleSoft Enterprise Portal as an option for creating a portal experience using the PeopleSoft Portal Solutions product family.

PeopleSoft Community Portal has the same collaborative features and functions as PeopleSoft Enterprise Portal. However, with PeopleSoft Community Portal, you are limited to creating and managing a maximum of three sites. With PeopleSoft Enterprise Portal, you can create and manage an unlimited number of sites.

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Using Portal Features*, "PeopleSoft Community Portal."

PeopleSoft Enterprise Internal Controls Enforcer

Oracle's PeopleSoft Enterprise Internal Controls Enforcer is designed to automate and enforce internal controls required under Section 404 of the Sarbanes-Oxley Act. Using the product's monitoring and diagnostic capabilities, you can reduce the cost of complying with the new regulations and the risk of unforeseen changes in internal controls. PeopleSoft Enterprise Internal Controls Enforcer will work in conjunction with other PeopleSoft corporate governance solutions to make the entire compliance process repeatable and auditable, allowing you to focus on running your business.

In addition, the product enables you to continuously track and monitor controls, and, optionally, certify their effectiveness at interim times throughout the year to support certifications that are required for Section 302 of Sarbanes-Oxley.

See *PeopleSoft Enterprise Internal Controls Enforcer 9.1 PeopleBook*.

PeopleSoft Enterprise Portal Feature Overview

Two key characteristics distinguish PeopleSoft Enterprise Portal as a rich Web 2.0 platform:

- First, PeopleSoft Enterprise Portal is a traditional portal framework that can be used for aggregating and managing content.
- Second, its collaborative capabilities make PeopleSoft Enterprise Portal a functional application that complements the features found in PeopleSoft applications.

PeopleSoft Enterprise Portal is built on the same architecture and with the same tools as PeopleSoft applications. This provides native integration and single sign-on with PeopleSoft applications. Because PeopleSoft Enterprise Portal is built on the PeopleTools platform, these core characteristics are also available in your portal implementations:

- Branding.
- Common toolset across all PeopleSoft applications.
- Database, application server, and web server independence.
- Feed Publishing Framework.
- Related Content Framework.
- Rich text editor.
- Role-based security and access management.
- Single sign-on.
- SOA support through Integration Broker.

Combined with pre-built application content delivered as PeopleSoft application portal packs, these features make configuration and deployment of PeopleSoft Enterprise Portal for a PeopleSoft-rich environment much easier than with other portals.

PeopleSoft Enterprise Portal provides numerous collaboration and Web 2.0 features such as blogs, content management, discussion forums feeds, tagging, collaborative workspaces and others. Each of these features is discussed briefly in this section.

Action Items

Miscellaneous to-do's and issues are frequently assigned during project status meetings and in workspaces. Successful resolution of these detailed action items is critical to meeting broader business objectives. PeopleSoft Enterprise Portal provides an action items feature that helps project leaders track open action items assigned to various team members as well as capture their resolution for a given project.

Blogs

Blogs (or weblogs) are a familiar and useful means for authoring and broadcasting information for an individual or team. Blogs are also participatory in that they allow for commentary and feedback from the audience. In PeopleSoft Enterprise Portal, blogs are integrated with other features such as feeds, notifications, search, tagging, and workspaces.

Branding

A WYSIWYG interface allows branding administrators to define and deploy header and footer elements for the portal. Because branding is integrated with site management as well as collaborative workspaces, subject matter experts can override these branding elements locally, making it easier for non-portal experts to create compelling sub-communities within the portal.

Calendars

In PeopleSoft Enterprise Portal, calendars allow communities to manage events within portals, sites, and workspaces. Individual communities or workgroups can maintain their own distinct calendars. Users can subscribe to any or each of the calendars to which they have access and display the results as a unified calendar on their homepage or within a workspace.

Collaborative Workspaces

A collaborative workspace is a virtual team room. Workspaces can be created to facilitate the completion of any project that requires a team to work collaboratively to accomplish its goals. Some collaborative projects focus on temporary issues that require short, intense collaborative sessions, such as closing a sales deal or an open problem incident. Other projects may be ongoing, such as coordinating the work for a department.

In PeopleSoft Enterprise Portal, collaborative workspaces incorporate the product's other collaborative features including action items, blogs, calendars, discussions, documents, feeds, polls, search, tagging, and wikis. In addition, workspaces can be contextually linked to PeopleSoft application pages to provide robust collaboration in the context of transactions and business processes.

Content Management

PeopleSoft Enterprise Portal's content management system enables you to organize all your content creation processes. The content management system helps you to manage, create, and organize content, through approval, version management, and publication features. The resulting content is ready and available for browsing by users and for reuse in portal pagelets, news publications, related information, and workspaces. Content migration allows you to author content in a staging database and then migrate the finalized content to a production database.

Context Manager

In PeopleSoft Enterprise Portal, Context Manager appears as a frame on the right side of the page displaying pagelets that are loaded with appropriate information based on the target page or transaction. Context Manager is the framework within which features—such as, related information, related contacts, related resources, related discussions, related workspaces, related links, and content ratings—operate. PeopleSoft Enterprise Portal also delivers related content services to provide PeopleSoft Enterprise Portal features on any PeopleSoft application pages.

See "[PeopleSoft Enterprise Portal Preface, Related Content Services, page xiii](#)."

Discussion Forums

Discussion forums provide a platform that groups can use to discuss topics of interest. Participants can post discussion topics, such as issues, suggestions, or questions, and receive replies and feedback. In PeopleSoft Enterprise Portal, discussion forums are integrated with other features such as action items, alerts, documents, feeds, notifications, search, tagging, and workspaces. Standalone forums within a portal or site can be managed as moderated or unmoderated.

Feed Publishing and Consumption

PeopleSoft Enterprise Portal leverages the PeopleTools Feed Publishing Framework to deliver feeds for several features including blogs, discussion forums, news publications, and workspaces. You can use the framework to publish secure or public feeds. These feeds make it easy for people to subscribe to information that interests them, rather than logging into the application that delivers this information. PeopleSoft Enterprise Portal also provides pagelets and features that facilitate the discovery and consumption of internal and external feeds.

My Links

My Links functionality provides an easy way for to bookmark your most frequently needed and accessed content. My Links serves as a collection of bookmarks to specific PeopleSoft Enterprise Portal pages, to PeopleSoft transactions, and to non-PeopleSoft content such as external websites.

Polls and Surveys

PeopleSoft Enterprise Portal provides polls as a simple way to gather opinions and comments from portal users using a pagelet that is displayed on the portal or site homepage, in a workspace, or attached to a menu item. While polls cover a single question only, surveys allow you to create and distribute questionnaires and evaluate the responses.

Related Content Services

The PeopleTools Related Content Framework provides the tools for subject matter experts or portal administrators to contextually link application pages with collaborative content provided as related content services. PeopleTools provides the service definitions for three PeopleSoft Enterprise Portal related content services:

- Related Discussion service
- Related Links service
- Related Tags service

These related content services provide features of PeopleSoft Enterprise Portal that can be added to PeopleSoft application pages through the framework. While the service definitions are provided in PeopleTools, an installed PeopleSoft Enterprise Portal database is required to provide the services and to store the related data.

Resource Finder

Resource Finder is a highly flexible repository that you can configure to receive data loads containing information about any organizational resource, along with links that relate these resources to each other. These resources are typically things like customers, suppliers, employees, departments, locations, companies, and business units, but can also be easily expanded to include things like products and projects, for example.

Search

In PeopleSoft Enterprise Portal, searches can be executed from the portal header, from within specific features, and via saved searches. From the portal header and the search page, searches can be scoped or limited to specific types of content. Because tags are integrated into search indexes, search results improved based on user tagging. Integration with Oracle's Secure Enterprise Search (SES) exposes PeopleSoft Enterprise Portal content to external systems via web services.

Tags

Tags, also known as social bookmarks, provide the means for users to store, organize, search, and manage content bookmarks in PeopleSoft Enterprise Portal. Tagging increases the probability of properly characterizing the content and hence its discovery and use. In PeopleSoft Enterprise Portal, tagging is integrated directly with other content types including blogs, collaborative workspaces, content management system items, and discussion forums. In addition, the tagging framework is available through the Related Tags service and to non-PeopleSoft applications as a web service.

Third-Party Integration

PeopleSoft Enterprise Portal supports integration with:

- Calendar servers: Lotus Domino or Microsoft Exchange 2003 and 2007.
- Email servers: IMAP, Lotus Domino, Microsoft Exchange 2003 and 2007, or POP.
- Instant messaging domains: GTalk, Sametime, XMPP, or Yahoo.
- Oracle Secure Enterprise Search (SES).

Wikis

Wikis support the collaborative authoring needs of portal users. In PeopleSoft Enterprise Portal, wikis are available in collaborative workspaces, which means that the security controls of workspaces apply to wikis. Wikis incorporate the easy to use rich text editor and other features to provide a collaborative authoring environment.

User Interface Features

The PeopleSoft Enterprise Portal user interface relies on these features and others from PeopleTools:

- AJAX features such as modal dialog boxes, drop-down menu navigation, and partial page and pagelet refreshes.
- Branding updates incorporating the SWAN style sheet.

- Menu bread crumbs.
- Pagelet drag-and-drop.
- Pagelet Wizard pagelets with help and search.

PeopleSoft Enterprise Portal and PeopleTools Portal Technology

To understand the functionality of PeopleSoft Enterprise Portal, Oracle recommends that you familiarize yourself with PeopleTools, focusing especially on the PeopleBooks and chapters that are devoted to portal functionality. Because PeopleSoft Enterprise Portal builds upon the basic internet architecture that is delivered with PeopleTools, this information gives you an excellent foundation of knowledge upon which the PeopleSoft Enterprise Portal suite of PeopleBooks builds.

PeopleTools portal technology is built on top of PeopleSoft Pure Internet Architecture and enables you to easily access and administer multiple content providers, including PeopleSoft databases such as Oracle's PeopleSoft Enterprise HRMS or Oracle's PeopleSoft Enterprise CRM, as well as non-PeopleSoft content. It enables you to combine content from these multiple sources and deliver the result to users in a unified, simple-to-use interface.

The main elements of the PeopleTools portal technology are a portal servlet and an application server. These two elements work together to provide common portal processing features such as page assembly, search ability, content management, navigation, and homepage personalization.

PeopleTools PeopleBooks cover the PeopleSoft Pure Internet Architecture and PeopleTools portal technology in detail.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology*.

Using this PeopleBook

This section discusses:

- About this book.
- Common elements used in PeopleSoft Enterprise Portal.

About this Book

This PeopleBook comprises the following chapters:

- Chapter 1: Introducing Collaborative Workspaces

This chapter provides an introduction to collaborative workspaces and the workspace homepage.

See [Chapter 1, "Introducing Collaborative Workspaces," page 1](#).

- Chapter 2: Setting Up Collaborative Workspace Options and Templates

This chapter describes system options to enable workspace features and documents how to create and maintain workspace templates.

See [Chapter 2, "Setting Up Collaborative Workspace Options and Templates," page 9.](#)

- Chapter 3: Creating Collaborative Workspaces

This chapter describes how to create collaborative workspaces.

See [Chapter 3, "Creating Collaborative Workspaces," page 41.](#)

- Chapter 4: Administering Collaborative Workspaces

This chapter describes how to administer workspaces and workspace modules.

See [Chapter 4, "Administering Collaborative Workspaces," page 59.](#)

- Chapter 5: Working in Collaborative Workspaces

This chapter describes how to use each workspace module and the pagelets on the workspace homepage.

See [Chapter 5, "Working in Collaborative Workspaces," page 91.](#)

Common Elements Used in PeopleSoft Enterprise Portal

This section discusses the rich text editor.

About the Rich Text Editor

Many PeopleSoft Enterprise Portal features—including blogs, discussion forums, text/HTML content, wiki content, and others—employ the rich text editor.

The rich text editor provides editing and formatting capabilities for long edit boxes. It allows for the rich formatting of text content, including structural elements such as HTML tags and lists, formatting treatments such as bold and italic text, and drag-and-drop inclusion and sizing of images among other features. Moreover, the rich text editor tool bar is extensible by using a custom settings configuration file.

See *Enterprise PeopleTools 8.50 PeopleBook: Using PeopleSoft Applications*, "Working With Pages," Working With Rich Text-Enabled Fields.

Related PeopleBooks

This section discusses:

- PeopleSoft Enterprise Portal PeopleBooks.
- PeopleTools PeopleBooks.

PeopleSoft Enterprise Portal PeopleBooks

The PeopleSoft Enterprise Portal PeopleBook library includes:

- *PeopleSoft Enterprise Portal 9.1 PeopleBook: Branding*

This PeopleBook covers the branding feature, which enables you to apply various branding themes to the portal, portal sites, and collaborative workspaces to present multiple visual designs and deliver appropriate links for specific user audiences.

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Branding*.

- *PeopleSoft Enterprise Portal 9.1 PeopleBook: Collaborative Workspaces*

The PeopleBook you are reading, this book covers setup, administration, and use of collaborative workspaces, which are virtual team rooms that facilitate collaboration on a variety collaborative projects and processes.

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Collaborative Workspaces*.

- *PeopleSoft Enterprise Portal 9.1 PeopleBook: Content Management System*

This PeopleBook describes the content management system, which includes features to help you manage, create, and organize content. The resulting content is ready and available for placement in various portal pagelets and news publications; reuse in workspaces, calendars, and other portal features; or available just for browsing.

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Content Management System*.

- *PeopleSoft Enterprise Portal 9.1 PeopleBook: Portal and Site Administration*

This PeopleBook covers tasks for administering portals and sites including product configuration, system-wide setup and administration, integration with third-party systems, and so on.

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Portal and Site Administration*.

- *PeopleSoft Enterprise Portal 9.1 PeopleBook: Resource Finder*

This PeopleBook describes how to setup and use Resource Finder, a highly flexible repository that describes any organizational resource, along with links that relate these resources to each other.

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Resource Finder*.

- *PeopleSoft Enterprise Portal 9.1 PeopleBook: Using Portal Features*

This PeopleBook covers setup and usage of items such as blogs, calendars, discussion forums, feeds, tagging, searching, related content services, and other features of PeopleSoft Enterprise Portal.

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Using Portal Features*.

PeopleTools PeopleBooks

The PeopleTools 8.50 PeopleBook library contains the complete set of books covering PeopleTools 8.50. In particular, several of these books are useful to the setup, administration, and use of PeopleSoft Enterprise Portal including:

- *Enterprise PeopleTools 8.50 PeopleBook: Feed Publishing Framework*

The PeopleTools Feed Publishing Framework supports the publication of PeopleSoft Enterprise Portal data as feeds. In addition, the framework can be used to develop custom feed types.

- *Enterprise PeopleTools 8.50 PeopleBook: Integration Broker Administration*

Integration Broker facilitates the exposure of PeopleSoft business logic as services and the consumption of external web services. Integration Broker also supports synchronous and asynchronous messaging between PeopleSoft applications and with third-party systems.

- *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology*

PeopleTools portal technology is the foundation of the PeopleSoft Enterprise Portal product. This book covers critical portal technologies such as portal implementation, PeopleSoft Pure Internet Architecture, Pagelet Wizard, the Related Content Framework, and others.

- *Enterprise PeopleTools 8.50 PeopleBook: Security Administration*

This book covers important security-related topics including PeopleTools user profiles, roles, permission lists, single sign-on (SSO), and others.

- *Enterprise PeopleTools 8.50 PeopleBook: Using PeopleSoft Applications*

This PeopleBook provides general information about PeopleSoft applications useful to all users of PeopleSoft systems. Topics include an introduction to the PeopleSoft Pure Internet Architecture, explanation of how to navigate through the system, how to perform searches, elements of application pages, and so on.

Note. These and other PeopleBooks in the PeopleTools library are referenced as needed.

PeopleBooks and the Online PeopleSoft Library

A companion PeopleBook called PeopleBooks and the Online PeopleSoft Library contains general information, including:

- Understanding the PeopleSoft online library and related documentation.
- How to send PeopleSoft documentation comments and suggestions to Oracle.
- How to access hosted PeopleBooks, downloadable HTML PeopleBooks, and downloadable PDF PeopleBooks as well as documentation updates.
- Understanding PeopleBook structure.
- Typographical conventions and visual cues used in PeopleBooks.
- ISO country codes and currency codes.
- PeopleBooks that are common across multiple applications.
- Common elements used in PeopleBooks.
- Navigating the PeopleBooks interface and searching the PeopleSoft online library.

- Displaying and printing screen shots and graphics in PeopleBooks.
- How to manage the PeopleSoft online library including full-text searching and configuring a reverse proxy server.
- Understanding documentation integration and how to integrate customized documentation into the library.
- Glossary of useful PeopleSoft terms that are used in PeopleBooks.

You can find this companion PeopleBook in your PeopleSoft online library.

Chapter 1

Introducing Collaborative Workspaces

This chapter introduces collaborative workspaces and provides an overview of:

- Workspace homepage
- Workspace menu
- Workspace modules

Understanding Collaborative Workspaces

In Oracle's PeopleSoft Enterprise Portal, a collaborative workspace is a virtual team room. You can create a workspace to facilitate the completion of any project that requires a team to work collaboratively to accomplish its goals, even if team members are in disparate locations.

Some collaborative projects focus on temporary issues that require short, intense collaborative sessions, such as closing a sales deal or an open problem incident. Other projects may be ongoing, such as coordinating the work for a department.

Workspaces can be created to manage many different collaboration scenarios. Some examples include:

- Supplier relationships — Managing the ongoing relationship with a supplier with contextual links to one or more transactions related to that supplier.
- Customer relationships — Managing the an ongoing relationship with a customer with contextual links to one or more transactions related to that customer.
- Period closing processes — Managing the process to close an accounting period such as end of month, end of quarter, or end of fiscal year.
- Sales opportunities — Managing a specific sales opportunity from prospect identification through deal close.
- Proposal development — Managing the process of developing and delivering a proposal.
- Problem resolution — Managing a specific problem incident.
- Department management — Managing the information and processes for a particular department.

Understanding the Workspace Homepage

The workspace administrator can configure the workspace homepage to display pagelets relevant to the content of the workspace, including pagelets associated with each workspace module. The workspace homepage displays the modules selected for the workspace in the menu on the left and pagelets selected for the workspace homepage in selected columns as shown in the following example:

The screenshot displays the Oracle Workspace interface for a 'Demo Wiki Workspace'. The top navigation bar includes the Oracle logo, the workspace name, and a user greeting: 'Welcome Vice President of Finance'. A search bar and 'Portal Home' / 'Sign out' links are also present. The main content area is organized into several sections:

- Wiki Content:** Contains introductory text about 'California-based Auto Parts Place' and a 'Market Status' section with a numbered list of five points:
 - Up-to-date classifying of car parts on stock
 - Direct warehouse to consumer shipping
 - Vast inventory of auto parts
 - Overnight/second day shipping options
 - Live online support available all over the world.
- Product Line:** Lists car brands supported by the company: GMC, Suzuki, Pontiac, Jaguar, Mitsubishi, Honda, Porsche, Lexus, Land Rover, Mercury, Buick, Cadillac, Plymouth, Nissan, Geo, Ferrari, Chevrolet, Kia, BMW, International, Subaru, Acura, Volvo, Infiniti, Lincoln, Saturn, Isuzu, Rover, Toyota, Renault, Saab, Eagle, Mercedes-Benz, Mazda, Jeep, Dodge, Audi, Hyundai, Rolls Royce, Ford, Chrysler, Oldsmobile.
- Tags:** Shows a list of tags: 'autoparts, california, discount'. It indicates the tags are 'Public' and 'Private', and are tagged by 1 user.
- Blogs:** Features a recent blog entry titled 'Guide to Buying Used Auto Parts' by 'Vice President of Finance' dated 'Aug 25, 2009'.
- Recent Discussions:** A section for tracking recent discussions, with columns for 'Date', 'Recent Posts', and 'Author'.

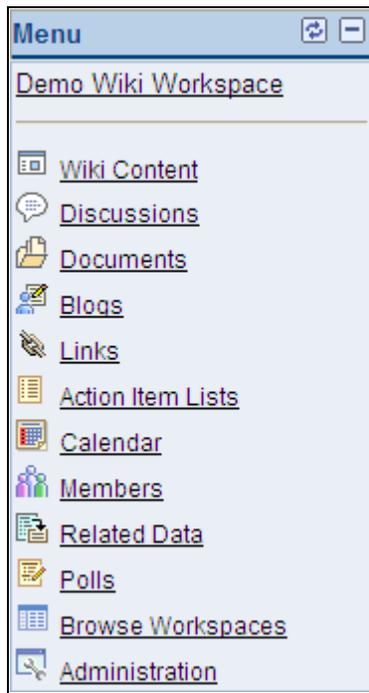
The right sidebar contains several utility sections:

- Calendar:** A calendar for September 2009.
- Upcoming Events:** A section indicating 'No events found for the date range.'
- Open Action Items:** A section indicating 'No Action Items available.'
- Links:** A section indicating 'No Links'.
- Poll:** A section indicating 'This poll is not available.'

Workspace homepage

Understanding the Workspace Menu

The workspace menu displays the modules selected for use in that workspace in the Menu pagelet as shown in the following example:



Workspace menu

Understanding Workspace Modules

The workspace administrator configures which modules are active in a workspace simply by selecting check boxes on the module administration page as shown in the following example:

Properties Members Modules Contextual Data Feed Advanced

Select which modules you would like for this workspace.

Modules			
Select	Module Name	Description	Properties
<input type="checkbox"/>	Welcome	The overview page of the collaborative workspace	
<input checked="" type="checkbox"/>	Wiki Content	Edit or view wiki page content and information.	
<input checked="" type="checkbox"/>	Discussions	Maintain multiple discussion topics with members	
<input checked="" type="checkbox"/>	Documents	Upload, organize and securely share documents with other members of the workspace	Properties
<input checked="" type="checkbox"/>	Blogs	Maintaining Workspace Blog posts	
<input checked="" type="checkbox"/>	Links	Maintain a list of easily accessible links for the team	
<input checked="" type="checkbox"/>	Action Item Lists	Maintain multiple Action Item Lists with members	
<input checked="" type="checkbox"/>	Calendar	Maintain Calendar Events with members	
<input checked="" type="checkbox"/>	Members	View a list of all members with links to user profiles	
<input checked="" type="checkbox"/>	Related Data	Display related data pagelets for a specific workspace template	
<input checked="" type="checkbox"/>	Polls	Maintain the workspace poll questions	
<input checked="" type="checkbox"/>	Browse Workspaces	Access related collaborative workspaces or perform searches for specific workspaces to which you have access.	
<input checked="" type="checkbox"/>	Administration	Manage the properties and members of your workspace	

There is no related pagelet found for this workspace.

[Add Related Pagelet](#)

Module administration

The modules available in a workspace include:

- Welcome module.

When the Welcome module is selected for a workspace, then the Welcome pagelet displays the welcome text on the workspace home page.

See [Chapter 4, "Administering Collaborative Workspaces," Administering Workspace Properties, page 67.](#)

- Wiki Content module.

Use the Wiki Content module to collaboratively author wiki content for the workspace. The Wiki Content module provides features such as version control and multi-language support that allow continuous and collaborative refinement of the content. The rich text editor is used to edit the wiki content, which also displays in the Wiki Content pagelet.

See [Chapter 5, "Working in Collaborative Workspaces," Using the Wiki Content Module, page 105.](#)

- Discussions module.

Use the Discussions module to participate in discussions relevant to the workspace. The Discussions module enables workspace members to post discussion topics and replies, and provides the complete history of interaction on a topic. Members can also monitor recent discussion postings using the Recent Discussions pagelet that displays on the workspace homepage.

See [Chapter 5, "Working in Collaborative Workspaces," Using the Discussions Module, page 118.](#)

- Documents module.

Use the Documents module to publish, optionally approve, and view shared documents relevant to a workspace. Members can monitor recent document postings using the Recent Documents pagelet that displays on the workspace homepage.

See [Chapter 5, "Working in Collaborative Workspaces," Using the Documents Module, page 120.](#)

- Blogs module.

Use the Blogs module to participate in the blog for the workspace. The Blogs module enables workspace members to create news and multithreaded commentary on topics relevant to the workspace. Members can also monitor recent blog postings using the Blogs pagelet that displays on the workspace homepage.

See [Chapter 5, "Working in Collaborative Workspaces," Using the Blogs Module, page 121.](#)

- Links module.

Use the Links module to create a collection of links relevant to the workspace. This collection displays in the Links pagelet that displays on the workspace homepage.

See [Chapter 5, "Working in Collaborative Workspaces," Using the Links Module, page 123.](#)

- Action Item Lists module.

Use the Action Item Lists module to maintain action item lists and action items defining responsibilities for individual workspace members. Members can also monitor current action items using the Open Action Items pagelet that displays on the workspace homepage.

See [Chapter 5, "Working in Collaborative Workspaces," Using the Action Item Lists Module, page 132.](#)

- Calendar module.

Use the Calendar module to maintain the workspace calendar and events to coordinate the activities of the workspace team. Members can also monitor current events using the Upcoming Events and Calendar pagelets that display on the workspace homepage. Moreover, the Calendar pagelet can simultaneously display events from multiple calendars available from all portals, sites, and workspaces.

See [Chapter 5, "Working in Collaborative Workspaces," Using the Calendar Module, page 133.](#)

- Members module.

Use the Members module to get information about and communicate with workspace members. The Members module provides access to member profiles, as well as links to initiate email and instant messaging with members. The Members module is required in all workspaces.

See [Chapter 5, "Working in Collaborative Workspaces," Using the Members Module, page 136.](#)

- Related Data module.

Use the Related Data module to access a collection of pagelets relevant to the workspace. This collection of pagelets is compiled by the workspace administrator.

See [Chapter 5, "Working in Collaborative Workspaces," Using the Related Data Module, page 140.](#)

- Polls module.

Use the Polls module to create questions for the workspace poll. Members can respond to the poll and monitor poll results using the Poll pagelet that displays on the workspace homepage.

See [Chapter 5, "Working in Collaborative Workspaces," Using the Polls Module, page 141.](#)

- Browse Workspaces module.

Use the Browse Workspaces module to browse the workspace hierarchy or search to find other workspaces. You can create new workspaces or child workspaces in this module.

See [Chapter 5, "Working in Collaborative Workspaces," Using the Browse Workspaces Module, page 143](#)

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- Administration module.

The workspace administrator can use the Administration module to define workspace properties, manage workspace membership and security, select workspace modules, define contextual data relationships, and further customize the workspace. The Administration module is required in all workspaces.

See [Chapter 4, "Administering Collaborative Workspaces," Setting Up a Workspace, page 65.](#)

Chapter 2

Setting Up Collaborative Workspace Options and Templates

This chapter provides an overview of workspace setup and discusses how to:

- Set up system options for workspaces.
- Set up the workspace category hierarchy.
- Set up workspace instant messaging.
- Set up workspace templates.
- Import and export template data.

Understanding Workspace Setup

To use collaborative workspaces in Oracle's PeopleSoft Enterprise Portal, you must complete these setup steps:

1. Setup system options.
2. Create a workspace category hierarchy (optional).
3. Set up instant messaging for workspaces.
4. Create workspace templates.

Setting Up System Options for Workspaces

This section discusses how to set system options for workspaces.

Page Used to Set Up System Options for Workspaces

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Installation Options	EO_PE_OPTIONS1	Portal Administration, System Data, Installation Options	Define portal installation options, including options that are specific to the collaborative workspace feature.

Setting System Options

Access the Installation Options page (Portal Administration, System Data, Installation Options).

Installation Options	Portal and Security Defaults	Last ID Values
<p>Select the Portal Solutions installation system options. The Image Attachment URL Path is used to dynamically look up where the content management image attachments are on the web server. This path is used to render the image. The maximum email notifications limits the number of notifications that can be sent.</p>		
Search Results Weighting		
<input type="checkbox"/> Include Content Rating Results		
Search Alert Notification		
<input checked="" type="checkbox"/> Enable Saved Search Alerts		
Branding		
<input checked="" type="checkbox"/> Enable Branding Themes		
<input checked="" type="checkbox"/> Enable Adding Image Objects		
<input checked="" type="checkbox"/> Enable Adding HTML Objects		
Resource Finder		
<input checked="" type="checkbox"/> Enable Resource Finder		
<input type="checkbox"/> Use Resource Finder for Profile Pages		
Content Management		
*Image Attachment URL Path:	<input type="text" value="/ps/images/portal_pa/"/>	
Discussion Forums		
*Discussions Viewing Default:	<input type="text" value="Threaded View"/> ▼	
<input checked="" type="checkbox"/> Site Specific		
Collaborative Workspaces		
Maximum Email Notifications:	<input type="text"/>	
*Default Module Image:	<input type="text" value="PS_EPPCW_WELCOME_ICN"/> 🔍	
<input checked="" type="checkbox"/> Default Presence Indicators in Members Module		
<input checked="" type="checkbox"/> Enable External Users		
Calendar Events / Action Items		
*Export Option:	<input type="text" value="Open Calendar Program"/> ▼	
*Alerts iCal Attachment:	<input type="text" value="No iCal attachment on Alerts"/> ▼	

Installation Options page

This section discusses the options in the Resource Finder and Collaborative Workspaces group boxes that are used to define installation options for workspaces.

Other options on this page are covered in the *PeopleSoft Enterprise Portal 9.1 PeopleBook: Portal and Site Administration*.

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Portal and Site Administration*, "Configuring Enterprise Portal," Defining Installation Options.

Resource Finder

Enable Resource Finder Select this check box to use the Resource Finder feature.

Use Resource Finder for Profile Pages Select to use Resource Finder participant profiles as the source for workspace member profiles accessible from the Members module. When a user clicks a member name link in the Members module, the member profile displayed will be based on the member's Resource Finder participant profile.

For this option work as designed, you must have the following setup in place:

- Resource Finder has been set up and loaded with data. This setup includes the generation of associated Resource Finder search collections.
- Resource Finder participants have been loaded with their associated user IDs, where applicable.

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Resource Finder*, "Importing Participant Data," Loading Participant User IDs.

If you do not select this option, when a user clicks a member name link in the Members module, the member profile that displays is based on information from the following tables: PSOPRDEFN, PSUSEREMAIL, EPPCW_MEMBERS, and PS_EPPRC_IM_USERVW.

See [Chapter 5, "Working in Collaborative Workspaces," Using the Members Module, page 136.](#)

Collaborative Workspaces

Maximum Email Notifications Enter the maximum number of email messages you want to be able to send in the member invitation notification process for a workspace.

If the number of email messages sent in the notification process exceeds this number, an error displays and no email messages are sent by the system.

Default Module Image Select the name of the image you want to display by default in the workspace menu to the left of a module name. If a module has its own image defined, this default image is overridden.

Default Presence Indicators in Members Module Select to display instant messaging presence indicators in the Members module. If you decide to display presence indicators, keep in mind that one server trip is executed per indicator per member.

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Portal and Site Administration*, "Setting Up Instant Messaging in PeopleSoft Enterprise Portal."

Enable External Users Select to enable the option to create external user accounts for workspaces.

See [Chapter 4, "Administering Collaborative Workspaces," Administering Workspace Members, page 69.](#)

Setting Up the Workspace Category Hierarchy

This section provides an overview of the workspace category hierarchy and discusses how to:

- Manage the workspace category hierarchy.
- Add and edit workspace categories.
- Move a category.

Understanding the Workspace Category Hierarchy

Use the workspace category hierarchy to organize workspaces. When you create workspace templates and workspaces, you can assign them a category you have defined using the Manage Categories component.

When you use the Manage Workspaces and Manage Templates components, you can choose to search for, browse, and sort existing workspace templates and workspaces by category.

Pages Used to Set Up Workspace Categories

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Collaborative Workspace Category Hierarchy	EPPCW_MAINTCATG	Portal Administration, Workspaces, Manage Categories	Manage the hierarchy of categories used to organize workspace templates and workspaces.
Add Category	EPPCW_AE_CATEGORY	Click the Add Category button on the Collaborative Workspace Category Hierarchy page.	Add a category to the workspace category hierarchy.
Edit Category	EPPCW_AE_CATEGORY	Click the Edit Category button on the Collaborative Workspace Category Hierarchy page.	Edit a category in the workspace category hierarchy.
Select Category	EPPCW_PARCATG_SEL	Click the Move Category button on the Edit Category page	Use the Select Category page to move the current category in the category hierarchy.
Delete Confirmation	EO_PE_DEL_CONFIRM	Click the Delete Category button on the Collaborative Workspace Category Hierarchy page.	Confirm or cancel the deletion of a category in the workspace category hierarchy.

Managing the Workspace Category Hierarchy

Access the Collaborative Workspace Category Hierarchy page (Portal Administration, Workspaces, Manage Categories).

Collaborative Workspace Category Hierarchy page

Top Category

Use the Top Category group box to enter information about the top category, or root of the workspace category hierarchy. This single top category will house all categories for your workspace implementation.

Category Name

Enter the name you'd like to use to identify the top category of your workspace category hierarchy. The category you define here is the top folder in the graphical representation of the category hierarchy that appears in the lower portion of the page.

Description

For internal reference, enter a description of the top category.



and

Indicate a category that contains other categories. Click to display or hide child categories.



Indicates a category that does not contain any other categories.

Click linked category name text to access any of the following editing options applicable to the selected category.

Add Category	Click to access the Add Category page, where you can add a category to the selected category.
Edit Category	Click to access the Edit Category page, where you can edit the selected category.
Delete Category	Click to access the Delete Confirmation page, where you can confirm or cancel the deletion of the selected category.

Note. You can't delete the top category, but you can rename it.

Adding and Editing Workspace Categories

Access the Add Category page (select a category and click the Add Category link on the Collaborative Workspace Category Hierarchy).

Access the Edit Category page (select a category and click the Edit Category link on the Collaborative Workspace Category Hierarchy).

Edit Category

Category:

Description: 

Parent Category:

Edit Category page

Use the Add Category page to add a new category to the workspace category hierarchy.

Use the Edit Category page (shown) to edit or move an existing category.

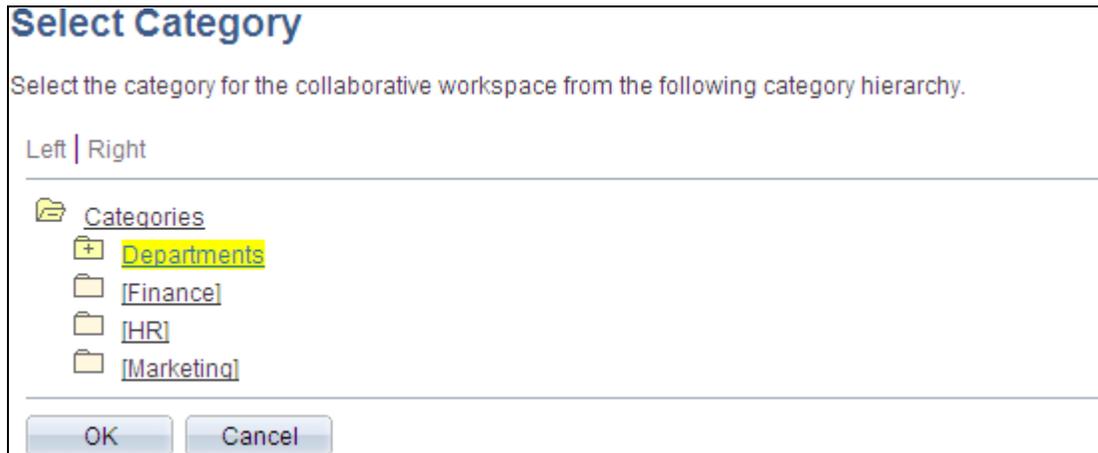
Category	Enter the name of the category.
Description	Enter a description for the category.
OK	Click to save your changes.
Cancel	Click to cancel any changes.

Move Category

Click to access the Select Category page to move this category to a new location in the hierarchy.

Moving a Category

Access the Select Category page (click the Move Category button on the Edit Category page).



Select Category page

To use the Select Category page to move a category:

1. Browse the category hierarchy to view the available categories:
 - Click a + to expand a category folder and reveal its contents.
 - Click a - to collapse a category folder and hide its contents.
2. Click a link for a category to select that category as the new parent category.

Setting Up Workspace Instant Messaging

Instant messaging functionality is available in workspaces by way of member profiles accessible from the Members module. To display instant messaging presence indicators in the Members module, select the Default Presence Indicators in Members Module option on the Installation Options page.

See [Chapter 2, "Setting Up Collaborative Workspace Options and Templates," Setting System Options, page 10.](#)

Setting Up Workspace Templates

This section provides an overview of workspace templates and discusses how to:

- Manage workspace templates.
- Create a workspace template.
- Set workspace template properties.
- Select template members.
- Select template modules.
- Define Documents module options for a template.
- Select related pagelets for a template.
- Define contextual data for a template.
- Select transactions for a template.
- Copying changes from a template.
- Define template security.
- Configure advanced options for a template.

Understanding Workspace Templates

When creating a workspace, you must select a workspace template on which to base the workspace. A workspace template is a model that provides common characteristics for the workspaces built from it. For example, a workspace template defines the default workspace modules, the default layout of the workspace homepage, default workspace members and privileges, and contextual relationships if applicable, among other characteristics of a workspace.

Three workspace templates are delivered with PeopleSoft Enterprise Portal:

- Base Workspace Template.

The base template provides basic module configuration in a three-column homepage layout. The other delivered templates are based on this base template.

- Base Workspace Template Wiki.

This template is a variation of the base template that includes the Wiki Content module instead of the Welcome module and a two-column homepage layout to accommodate wiki content.

- Demo Workspace Template.

This template is a variation of the base template that demonstrates a contextual data relationship between a transaction page (Demo Department Definition page) and an associated workspace.

Note. This template exists in the Demo database only.

A workspace template is a portal registry derived from the delivered workspace base portal template. Using the template administration pages documented in this section, you can define various aspects of this template registry, including security, contextual data, associated workspace modules, and related pagelets.

You can create additional workspace templates to suit your organization's needs. You can create highly or minimally configured templates, depending on their usage. For example, you can create separate templates to meet the needs of project groups, departments, business units, or transaction-based collaboration.

Pages Used to Set Up Workspace Templates

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Manage Templates	EPPCW_MANAGE	Portal Administration, Workspaces, Manage Templates	Use to browse and manage the list of workspace templates.
Create Workspace Template	EPPCW_TMPL_CREATE	Portal Administration, Workspaces, Create Template	Create a workspace template definition.
Template Created page	EPPCW_TMPL_COMPL	Click the Save button on the Create Workspace Template page.	Access the new template by clicking the template name link.
Administration - Properties	EPPCW_ADMIN_PROP	<ul style="list-style-type: none"> • In a workspace template, click the Administration link. • Click the template name link on the Template Created page. <p>Click the Administration link in the workspace menu.</p> <ul style="list-style-type: none"> • Portal Administration, Workspaces, Manage Templates <p>Click the template you want to administer.</p> <p>Click the Administration link in the workspace menu.</p>	Set workspace template properties such as name, category, and branding theme.
Select Branding Theme and Overrides	EPPSM_THM_ASSIGN	Click the Select Overridable Elements link on the Administration - Properties page.	Determine which branding elements can be overridden by workspace administrators.
Administration - Members	EPPCW_ADMIN_MBR	In a workspace template, click the Administration link. Select the Members tab.	Manage the membership settings of a workspace template.

Page Name	Definition Name	Navigation	Usage
Administration - Modules	EPPCW_ADMIN_MOD	In a workspace template, click the Administration link. Select the Modules tab.	Select the modules and pagelets that you want to include in the workspace template.
Documents Module Properties	EPPCW_DC_CATGOPTS	In a workspace template, click the Administration link. Select the Modules tab. Click the Properties link for the Documents module on the Administration - Modules page.	Define options available in the Documents module of workspaces created using the template.
Add Pagelet	EPPPB_CP_ADD	Click the Add Related Pagelet button on the Administration - Modules page.	Select a pagelet definition from a source portal, and add it to the template.
Edit Pagelet	EPPPB_CP_EDIT	Click the Edit Pagelet button for a related pagelet on the Administration - Modules page.	Edit the definition for a related pagelet.
Key Name Mapping	EPPCW_ADMIN_KEYMAP	Click the Map link for a related pagelet on the Administration - Modules page.	Select and optionally rename the keys passed to the pagelet.
Administration - Contextual Data	EPPCW_ADMIN_KEYS	In a workspace template, click the Administration link. Select the Contextual Data tab.	Manage contextual data associated with the template. For example, you can enter data that ties the template to one or more transactions, and to one or more transaction key fields.
Select Transaction	EPPCW_BROWSEREG	Click the Select Transaction button on the Administration - Contextual Data page.	Select a transaction that you want to include as contextual data for the template.
Administration - Copy Changes	EPPCW_ADMIN_COPY	In a workspace template, click the Administration link. Select the Copy Changes tab.	Copy selected items updated in this template to specified target workspaces, templates, or both.
Module Details Related Pagelets Link Details	EPPCW_ADM_COPY_DET	On the Administration - Copy Changes page, click a Details link.	Select which modules, pagelets, or links will be copied to the target workspaces.

Page Name	Definition Name	Navigation	Usage
Administration - Security	EPPCW_ADMIN_SEC	In a workspace template, click the Administration link. Select the Security tab.	Manage security options for the template.
Administration - Advanced	EPPCW_ADMIN_ADV	In a workspace template, click the Administration link. Select the Advanced tab.	Access tools and utilities that enable you to implement advanced configurations for the workspace template.

Managing Workspace Templates

Access the Manage Templates page (Portal Administration, Workspaces, Manage Templates).

Manage Templates

Activate, deactivate or delete existing collaborative workspace templates.

▼ Filter Templates

Category:

Owner:

Status: Active Inactive

Keyword: Search Reset

Templates				
Select	Template	Category	Owner	Status
<input type="checkbox"/>	Demo Workspace Template		Vice President of Finance	Active
<input type="checkbox"/>	Base Workspace Template			Active
<input type="checkbox"/>	Base Workspace Template Wiki		Vice President of Finance	Active

[Select All](#) [Clear All](#)

Manage Template page

Filter Templates

Category Select the category in which you want to search for the template that you want to manage.

Owner Select the owner of the template that you want to manage.

Status	Select the status of the workspace or template you want to manage. <i>Active.</i> <i>Inactive.</i>
Keyword	Enter any keywords that you want to use to narrow your search results. The keywords you enter will be matched against any text that appears in the title (label) or description of a template.
Search	Click to perform your requested search.
Reset	Click to clear all keywords you have entered.

Templates

Select	Select to indicate that you want to perform a managerial action on the workspace.
Template	Displays the name of the workspace template. Click the link to access the template.
Category	The system displays the category the template is assigned to.
Owner	The system displays the name of the template owner.
Status	The system displays if the template is active or inactive.
Activate	Click to reactivate the selected template.
Deactivate	Click to deactivate the selected template The template is not longer accessible or usable by its members, but its data continues to be stored in your database.
Delete	Click to delete the selected template . You are prompted to confirm your deletion.

Creating a Workspace Template

Access the Create Workspace Template page (Portal Administration, Workspaces, Create Template).

Create Workspace Template

Define a collaborative workspace template from which to create workspace instances.

***Name:**

Description:

Create Workspace Template page

- | | |
|--------------------|---|
| Name | Enter a name for the template. This name becomes an available value in the Template field on the Select a Workspace Template page. |
| Description | Enter a description of the template. This description displays when the template is selected on the Select a Workspace Template page. |
| Save | Click to create and save the template definition. Once the save is complete, you are transferred Template Created page. |

Accessing the Newly Created Template

After you have saved the new template, you are transferred to the Template Created page where you click the template name link to display the administration pages for the new template.

Working With Templates and the Action Item Lists Module

For the Action Item Lists module, when creating templates, the system does not create a default list. However, for creating a Workspace, the system does create a default list. If the template has any manually created lists, the Workspace being created from that template will contain a default list (with the same name as the Workspace) plus any manually created lists in the template.

Setting Template Properties

Access the Administration - Properties page (in a workspace template, click the Administration link).

The screenshot shows the 'TEMPLATE' Properties page for a 'Marketing' workspace template. The page is divided into a left sidebar and a main content area. The sidebar contains a navigation menu with items like 'Welcome', 'Discussions', 'Documents', 'Blogs', 'Links', 'Action Item Lists', 'Calendar', 'Members', 'Related Data', 'Polls', 'Browse Workspaces', and 'Administration'. The main content area has tabs for 'Properties', 'Members', 'Modules', 'Contextual Data', 'Copy Changes', 'Security', and 'Advanced'. The 'Properties' tab is active, showing fields for:

- *Name:** Marketing
- Description:** Use to create Collaborative Workspaces for working on marketing campaigns.
- Default Category:** (empty field with a search icon) Allow category override
- Branding Theme:** CW Theme - Swan Style (dropdown menu) [Select Overridable Elements](#)

 A 'Save' button is located below the fields. At the bottom of the main content area, there is a breadcrumb trail: Properties | Members | Modules | Contextual Data | Copy Changes | Security | Advanced.

Properties page

- Name** The template name you entered on the Create Workspace Template page appears and can be overridden. This name becomes an available value in the Template field on the Select a Workspace Template page.
- Description** Enter a description of the template. This description displays when the template is selected on the Select a Workspace Template page.
- Default Category** Select a category for the workspace template. This category appears by default on the Name and Describe Workspace page for a workspace created using this template.
- Allow Category Override** Select to be able to override the selected category on individual workspaces created using this template. You perform this override on the Name and Describe Workspace page.
- Branding Theme** Displays the branding theme that will be used to display workspaces created using this template. This field is editable for owners or administrators of a template.
- Branding themes available for selection are derived from the assembled themes as defined in the PeopleSoft Enterprise Portal branding feature.
- Allow category override** Enables the create and/or administrator of a workspace based on this template to select a different category.
- Select Overridable Elements** Select the link to display the Select Branding Theme and Overrides where you can select branding elements that you want to change.

Selecting Branding Overrides

Access the Select Branding Theme and Overrides page (click the Select Overridable Elements link on the Administration - Properties page).

Select Branding Theme and Overrides

Instructions

First select an Override Section. Then check Select for the Elements that the Workspace Administrator is allowed to override with their own values.

The Add button allows creation of newly dated versions to support the staging of future changes. Use the View All link to review all existing versions. Use Correct History to edit the current or past versions.

Workspace Template: DEMO_WORKSPACE_TEMPLATE

Branding Theme Find | View All First 1 of 1 Last

*Effective Date: 01/01/1900 Add Delete

*Description: Collaborative Workspace Brand

Theme ID: PAPPBR_THEME_CW_SWAN CW Theme - Swan Style Details

Override Section: Homepage Header

Overridable Elements Customize | Find | View All | First 1-10 of 10 Last

Select	Element ID	Description
<input type="checkbox"/>	1	My Links %1
<input type="checkbox"/>	2	Search Options %2
<input type="checkbox"/>	4	Personalization %4
<input type="checkbox"/>	6	Header Bar One %6
<input type="checkbox"/>	7	Header Bar Two %7
<input type="checkbox"/>	8	Header Bar Three %8
<input type="checkbox"/>	31	Custom Image %31
<input type="checkbox"/>	41	Custom Image URL %41
<input type="checkbox"/>	42	Custom Image URL %42
<input type="checkbox"/>	51	Custom HTML %51

[Map Keys](#)

Select Branding Theme and Overrides page

Determine which branding elements can be overridden by workspace administrators.

Effective Date Use this field to specify the date that the header or footer should take effect.

Add Click the button to add another effective dated version of the theme.

Delete Click the button to delete the current effective dated version of the theme.

Theme ID Object name of the branding theme.

Details	Click the link to display the Assemble Branding Theme page where you can define a branding theme. See <i>PeopleSoft Enterprise Portal 9.1 PeopleBook: Branding, "Configuring and Assembling Branding Themes," Assembling Branding Themes.</i>
Override Section	Indicates if the override value applies to the homepage header, homepage footer or target page header.
Select	Use the check box to select elements you want to override.
Element ID	Unique numeric identifier for the element. These elements are hard coded and serve as the foundation for PeopleSoft Enterprise Portal Branding.
Description	Description of the element type including its bind variable. This becomes the default description for the elements listed on the HTML Layouts and Element Selection page.

Selecting Template Members

Access the Administration - Members page (in a workspace template, click the Administration link; select the Members tab).

The screenshot shows the 'Administration - Members' page. At the top, there are tabs for Properties, Members (selected), Modules, Contextual Data, Copy Changes, Security, and Advanced. Below the tabs, a message states: 'Each invited member will receive an invitation by email with instructions and a link to your workspace.' The main content area is titled 'Members' and contains a table with the following columns: Type, Member Name, *Privilege Set, and a column with information icons and 'Delete' buttons. The table lists two members: 'User' with 'VP1' as the Member Name and 'Owner' as the Privilege Set; and 'Role' with 'PAPP_PUBLISHER' as the Member Name and 'Approver' as the Privilege Set. Below the table is an 'Add Workspace Member' button.

Type	Member Name	*Privilege Set		
User	VP1	Owner	i	Delete
Role	PAPP_PUBLISHER	Approver	i	Delete

Add Workspace Member

Administration - Members page

See [Chapter 2, "Setting Up Collaborative Workspace Options and Templates," Configuring Advanced Options for a Template, page 38.](#)

Members

Use the Members group box to manage the membership settings of the workspace template. These settings will be defaulted to the workspaces that are created using this template.

You can also use the Add Members page and the Administration - Members page used with workspaces to manage the membership of a workspace built using this template.

See [Chapter 3, "Creating Collaborative Workspaces," Step 5: Adding Workspace Members, page 48.](#)

Type

Select the type of member you want to add to the workspace template. Users and roles that are available for selection are those who have access to the PAPP5300 permission list. Available values include:

Role. Select to be able to select a role, or group of users, in the Member Name field. Available roles are defined in the Roles component.

See *Enterprise PeopleTools 8.50 PeopleBook: Security Administration*, "Setting Up Roles"

User. Select to be able to select a user in the Member Name field. You must select this value to be able to select a Privilege Set field value of *Owner* or *Administrator*. Available users are defined in the User Profiles component.

See *Enterprise PeopleTools 8.50 PeopleBook: Security Administration*, "Administering User Profiles"

Privilege Set

Select the privilege set you want to assign by default to the member in workspaces created using this template. You must select a Type field value of *User* to be able to select the *Owner* or *Administrator* value. Available values are:

Administrator.

Approver.

Contributor.

Moderator.

Owner.

Viewer.

See [Chapter 4, "Administering Collaborative Workspaces," Understanding Workspace Privilege Sets, page 60.](#)



Click to view information about the privilege set.

Selecting Template Modules

Access the Administration - Modules page (in a workspace template, click the Administration link; select the Modules tab).

Properties Members **Modules** Contextual Data Copy Changes Security Advanced

Select which modules you would like to be available to the workspace.

Modules			
Select	Module Name	Description	Properties
<input checked="" type="checkbox"/>	Welcome	The overview page of the collaborative workspace	
<input type="checkbox"/>	Wiki Content	Edit or view wiki page content and information.	
<input checked="" type="checkbox"/>	Discussions	Maintain multiple discussion topics with members	
<input checked="" type="checkbox"/>	Documents	Upload, organize and securely share documents with other members of the workspace	Properties
<input checked="" type="checkbox"/>	Blogs	Maintaining Workspace Blog posts	
<input checked="" type="checkbox"/>	Links	Maintain a list of easily accessible links for the team	
<input checked="" type="checkbox"/>	Action Item Lists	Maintain multiple Action Item Lists with members	
<input checked="" type="checkbox"/>	Calendar	Maintain Calendar Events with members	
<input checked="" type="checkbox"/>	Members	View a list of all members with links to user profiles	
<input checked="" type="checkbox"/>	Related Data	Display related data pagelets for a specific workspace template	
<input checked="" type="checkbox"/>	Polls	Maintain the workspace poll questions	
<input checked="" type="checkbox"/>	Browse Workspaces	Access related collaborative workspaces or perform searches for specific workspaces to which you have access.	
<input checked="" type="checkbox"/>	Administration	Manage the properties and members of your workspace	

There is no related pagelet found for this workspace.

[Add Related Pagelet](#)

Administration - Modules page

Select the modules that you want to include in the workspace template.

These settings will be defaulted to the workspaces that are created using this template. Welcome, Members, and Administration values are selected and unavailable for editing because those modules are required in a workspace.

The Properties link associated with a module enables you to further define the properties and options available in the module.

Defining Documents Module Options for a Template

Access the Documents Module Properties page (click the Properties link for the Documents module on the Administration - Modules page).

Documents Module Properties

Set the Documents module properties for this workspace. Select 'Cascade to All Child Folders' to cascade the content default approval setting to all the Document folders in this workspace. The changes take effect after saving.

Enable Content Versions

Enable Content Checkout

Enable Content Approval Cascade to All Child Folders

Enable Content Types to Add

File Attachment

Text or HTML

Managed Content

Documents Module Properties page

Enable Content Versions	Select to enable different versions of content.
Enable Content Checkout	Select to enable the check in and check out of documents posted to the Documents module in workspaces created using this template. If you select this option, fields and options enabling the check in and check out of documents display appropriately on the pages used to post documents to the Documents module.
Enable Content Approval	Select to enable the approval of documents posted to the Documents module in workspaces created using this template. If you select this option, fields and options enabling the approval of documents display appropriately on the pages used to post documents to the Documents module.
Cascade to All Child Folders	Will set the default approvals for all new content in child folders. The approval settings are transferred to all child folders when the page is saved. This setting does not affect existing child content approval settings.
Enable Text/HTML	Select to enable the posting of text and HTML documents to the Documents module in workspaces created using this template. If you select this option, the <i>Text or HTML</i> option displays on the Documents - Add Documents page in the Documents module.
Enable File Attachments	Select to enable the posting of file attachments to the Documents module in workspaces created using this template. If you select this option, the <i>File Attachment</i> option displays on the Documents - Add Documents page in the Documents module.
Enable Managed Content	Select to enable the posting of managed content to the Documents module in workspaces created using this template. If you select this option, the <i>Managed Content</i> option displays on the Documents - Add Documents page in the Documents module.

Adding or Editing a Related Pagelet in a Template

Access the Add Pagelet page (click the Add Related Pagelet button on the Administration - Modules page).

Access the Edit Pagelet page (click the Edit Pagelet button for an existing pagelet on the Administration - Modules page).

Add Pagelet

Select a pagelet definition from the selected source application, and add it to the current site.

*Source Application:

*Pagelet Folder:

*Pagelet Name:

Pagelet

*Pagelet ID:

*Pagelet Title:

Description:

*Pagelet Folder:

Pagelet Security

Publish as Public

Publish with Security Roles Author Access

Selected Security		
*Type	Name	Description
Permission List	PAPP0002	Logged in User Access
Permission List	PAPP9000	All Enterprise Portal Objects

Homepage Tabs

Select	Homepage Tab	*Pagelet Behavior
<input checked="" type="checkbox"/>	Related Data	Optional - Default
<input type="checkbox"/>	Welcome	Optional

[Preview Pagelet](#)

Add Pagelet page

Use the Add Pagelet page to add an already defined pagelet to be available on the workspace homepage (Welcome tab) or the workspace Related Data tab.

Source Application Select the portal registry that is the source of the pagelet definition.

Pagelet Folder Select the portal folder that is the source of the pagelet definition.

Pagelet Name Select the pagelet definition.

Pagelet Name	Displays the pagelet's ID.
Pagelet Title	Displays the pagelet's title, which can be modified.
Description	Enter an optional description for the pagelet.
Pagelet Folder	Select the folder in which the pagelet definition is to be stored. <i>PeopleSoft Applications</i> is the default folder for workspace pagelets.
Pagelet Security	Select a pagelet security option: <ul style="list-style-type: none"> • <i>Publish as Public</i> — Select to designate that all users can access the pagelet. • <i>Publish with Security Roles</i> — Select to use the already assigned role- or permission list-based security for the pagelet.
Author Access	Select to provide the pagelet author with access to the pagelet regardless of any security restrictions assigned to the pagelet. This access is granted based on the author's user ID.
Select	Select one or more workspace tabs for this pagelet: <ul style="list-style-type: none"> • <i>Related Data</i> — The Related Data module. • <i>Welcome</i> — The workspace homepage tab.
Pagelet Behavior	Select the default behavior for the pagelet: <ul style="list-style-type: none"> • <i>Optional</i> — The pagelet will not appear on the workspace tab. <i>Do not select this option.</i> • <i>Optional-Default</i> — The pagelet will appear on the workspace tab for all members. The pagelet position can be modified by the administrator only; the pagelet can also be removed by a member from his or her workspace homepage. • <i>Required</i> — The pagelet will appear on the workspace tab for all members. The pagelet position can be modified by the administrator only. • <i>Required-Fixed</i> — The pagelet will appear on the workspace tab for all members. The pagelet column can be modified by the administrator only; however, the pagelet will always appear at the top of the column.

Mapping Keys for Context-Sensitive Pagelets

Access the Key Name Mapping page (click the Map link for a context-sensitive pagelet on the Administration - Modules page).

Key Name Mapping

Specify and provide optional renames for the keys passed to the pagelet.

Menu Item Label: Demo Contextual Pagelet

Available Workspace Keys			
	Description	Key Name in Workspace	Key Name in Pagelet
<input checked="" type="checkbox"/>	Department ID	EO_PE_DEMO_DEPTID	<input type="text" value="EO_PE_DEMO_DEPTID"/>
<input checked="" type="checkbox"/>	Department	EO_PE_DEMO_DEPTLBL	<input type="text" value="EO_PE_DEMO_DEPTLBL"/>

OK Cancel

Key Name Mapping page

When a related pagelet is added to a workspace and is designated as being context-sensitive, the pagelet is passed the same key names and values that are associated with the workspace. These keys are passed to the pagelet as query string parameters. If needed, the key names can be overridden for a related pagelet by adding the EPPCW_KEYMAPPING attribute to the content reference representing the pagelet.

The pagelet's content reference can be accessed by clicking the Structure and Content link on the Administration - Advanced page. The syntax for the attribute value is as follows:

```
KEY1ORIGNAME=KEY1NEWNAME ;
KEY2ORIGNAME=KEY2NEWNAME ;
...
KEYNORIGNAME=KEYNNEWNAME
```

Defining Contextual Data for a Template

Access the Administration - Contextual Data page (in a workspace template, click the Administration link; select the Contextual Data tab).

Properties	Members	Modules	Contextual Data	Copy Changes	Security	Advanced
A Contextual Workspace template can be tied, by definition, to one or more transactions. Additionally, specific keys can be defined to allow the workspace to display and link to related data.						
Related Transactions						
Type	Portal / Subsite	Transaction Name	Component Interface			
Registered	EMPLOYEE	PAPP_DEMOSITE_HOME	<input type="text" value="EO_PE_SR_ITRACK"/>		<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="checkbox"/> Only for selected transactions						
Related Keys						
Display	Key	Custom Label				
<input checked="" type="checkbox"/>	EO_PE_DEMO_DEPTID	<input type="text" value="Department ID"/>			<input type="button" value="+"/>	<input type="button" value="-"/>
<input checked="" type="checkbox"/> Allow key overrides						

Administration - Contextual Data page

Use the Related Transactions group box to associate workspaces built using this template with specific transactions.

For example, if you create a template with a related transaction tied to a Customer Case transaction, when a user chooses to create a workspace by using the Workspaces page accessed directly from the Customer Case transaction, the template displays as the recommended template for use with the transaction.

Type	<p>Select the type of transaction you want to associate with the template.</p> <p><i>Not Registered.</i> Select to associate the template with a transaction that is not registered in the PeopleSoft database environment. When you select this value, the Node Name, URL, and Label fields display.</p> <p><i>Registered.</i> Select to associate the template with a transaction that is registered in the PeopleSoft database environment. When you select this value, the Portal / Subsite and Transaction Name fields display.</p>
Portal / Subsite	<p>Select the portal or subsite in which the internal transaction to which you want to tie this template resides. This field displays when the Type field is set to <i>Registered</i>.</p>
Transaction Name	<p>Enter one or more internal transactions to which you want to tie this template. This field displays when the Type field is set to <i>Registered</i>.</p> <p>Click the Select Transaction button to access the Select Transaction page, where you can select a transaction from a graphical representation of the portal registry.</p>
Component Interface	<p>Select a component interface to update the template with the key values of the transaction you are working with in step 2 of the wizard. Any component interface that has the GET tied to the component will update the template and when you create the workspace using that template the prompt will show the key values for you to select.</p> <p>This field displays when the Type field is set to <i>Registered</i>.</p>
Node Name	<p>Select the node through which the external transaction to which you want to tie this template should be accessed. These nodes are defined content providers from which content can be retrieved and rendered. This field displays when the Type field is set to <i>Not Registered</i>.</p>
URL	<p>Enter the URL to the external transaction to which you want to tie this template. This field displays when the Type field is set to <i>Not Registered</i>.</p>
Label	<p>Enter the label that you want to display for an unregistered transaction. This field displays when the Type field is set to <i>Not Registered</i>.</p> <p>Label text you enter here displays in the following places. The text displays on the Relate Workspace to a Transaction page when the keys edit boxes are presented, and second, they show up in the workspace menu (below the module choices in the left-hand).</p>
Only for selected transactions	<p>Select if you want this template to be available for selection only when a user chooses to create workspaces from the related transactions you define on this page. When a user creates a workspace based on any other transaction, this template will not be available for selection.</p>

Use the Related Keys group box to specify key fields that you want associate with this template. When you build a workspace using this template and associate it with a transaction that contains these key fields, the workspace is able to display pagelets and links related to the key field values from the transaction.

Note. Modifying existing field values or options set in this group box initiates a function that updates all workspace pagelet content reference URLs that contain an attribute of *EPPCW_PAGELET* with a value of *KEYS*. This change impacts all workspace pagelets, as well as any related pagelets associated with the workspace in which the key was modified.

Display	Select if you want the key field and its transactional value to display in a workspace created from this template using a transaction that contains the key field. Clear this option to hide certain keys and their values from workspace users.
Key	Enter the key field name that you want to associate with the workspace template. These keys and their values can be used to generate context-sensitive Related Pagelets and links that are specific to the workspace created from this template.
Custom Label	Enter an overriding value for the key label. If you choose to display the key, this label will appear alongside the key field value below the menu of a workspace created from this template for a transaction that contains the key.
Allow key overrides	Select if you want an administrator to be able to edit these keys in a workspace created using this template.

Selecting Transactions for a Template

Access the Select Transaction page (add a registered transaction and click the Select Transaction button on the Administration - Contextual Data page).

Note. You access this page by adding a transaction on the Contextual Data page. Set the type to registered, specify a portal name, and then click the prompt button.

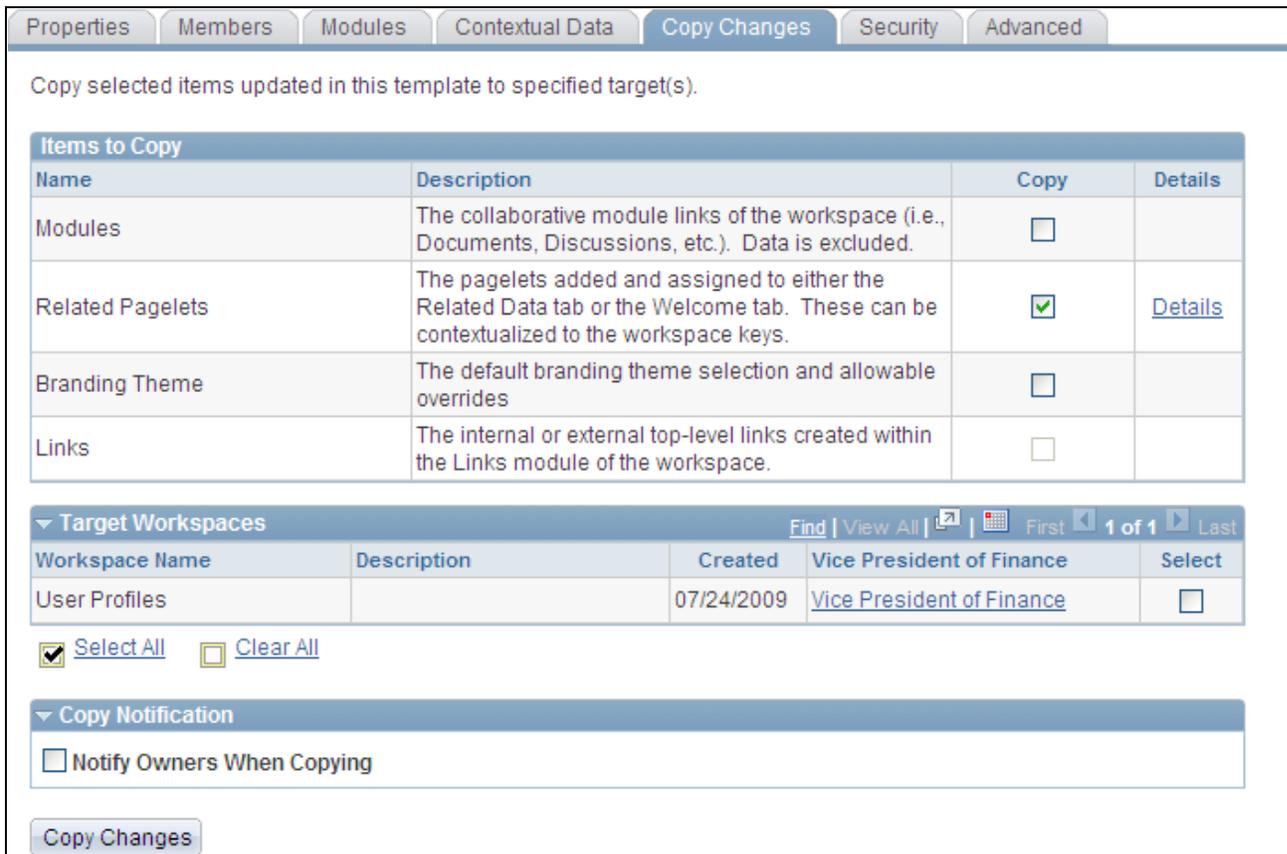
Select Transaction page

Portal / Subsite	Displays the portal or subsite you selected on the Administration - Contextual Data page, but can be overridden. Select the portal in which the transaction you want to associate the template resides.
Search by	<i>Description.</i> <i>Label.</i>
Search	Click to execute the search you entered using the Search by elements.

You can also manually click through the tree of folders to locate the transaction. Select the transaction you want to associate with the template and click OK to return to the Administration - Contextual Data page and add the transaction to the template.

Copying Changes from a Template

Access the Administration - Copy Changes page (in a workspace template, click the Administration link; select the Copy Changes tab).



Copy Changes page

Use this page to make changes to all workspaces created from this template.

Note. This is a portal registry copy only. No data is copied in the Copy Changes process.

Items to Copy

Select the options that you want to copy to the selected workspaces.

- Modules** You can select to copy all modules or only ones selected on the Modules page by clicking the Details link.
- Related Pagelets** You can copy pagelets from the Related Pagelets module. Click the Details link to view the Related Pagelets page.
- Branding Theme** You can copy branding themes and any other allowable overrides by selecting this checkbox.
- Links** You can copy internal or external link by selecting this option.

Target Workspaces

This section of the page lists all workspaces that have been generated using this template. Select the ones that you would like the changes copied to.

Note. If you are working with the base template, then instead of target workspaces, this section will show all target templates created using the base template.

Copy Notification

Select this option to send an email to workspace owners informing them that changes have been copied to their workspaces.

Determining Which Items to Copy

Access the Module Details page (click the Details link for modules on the Administration - Copy Changes page).

Access the Related Pagelets page (click the Details link for related pagelets on the Administration - Copy Changes page).

Module Details

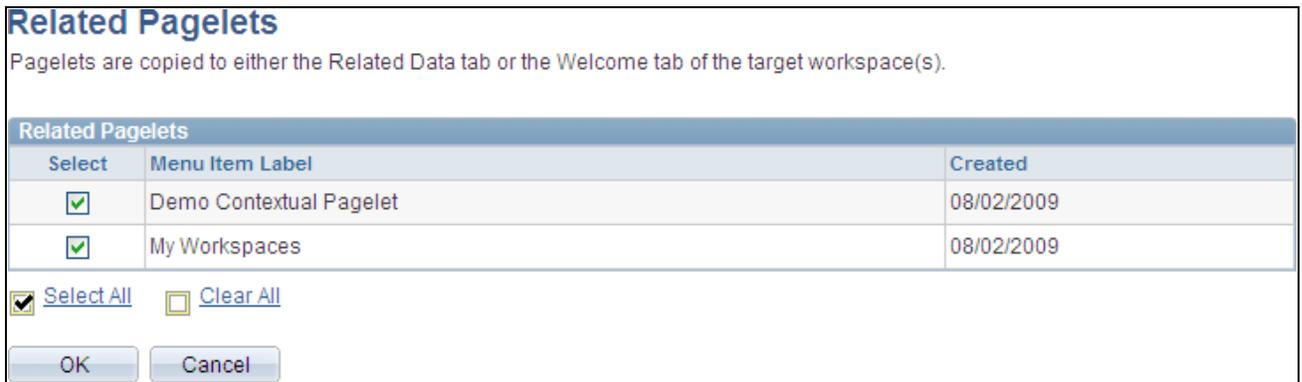
After copying module(s), they can be either immediately activated on the welcome tab of the workspace or left inactive and available for the workspace administrator or owner to add as appropriate. Only module links and pagelets are copied. No data is copied to the target workspaces.

Select	Module Name	Activate	Description
<input checked="" type="checkbox"/>	Welcome	<input checked="" type="checkbox"/>	The overview page of the collaborative workspace
<input checked="" type="checkbox"/>	Discussions	<input checked="" type="checkbox"/>	Maintain multiple discussion topics with members
<input checked="" type="checkbox"/>	Documents	<input checked="" type="checkbox"/>	Upload, organize and securely share documents with other members of the workspace
<input checked="" type="checkbox"/>	Links	<input checked="" type="checkbox"/>	Maintain a list of easily accessible links for the team
<input checked="" type="checkbox"/>	Action Item Lists	<input checked="" type="checkbox"/>	Maintain multiple Action Item Lists with members
<input checked="" type="checkbox"/>	Calendar	<input checked="" type="checkbox"/>	Maintain Calendar Events with members
<input checked="" type="checkbox"/>	Members	<input checked="" type="checkbox"/>	View a list of all members with links to user profiles
<input checked="" type="checkbox"/>	Related Data	<input checked="" type="checkbox"/>	Display related data pagelets for a specific workspace template
<input checked="" type="checkbox"/>	Polls	<input checked="" type="checkbox"/>	Maintain the workspace poll questions
<input checked="" type="checkbox"/>	Browse Workspaces	<input checked="" type="checkbox"/>	Access related collaborative workspaces or perform searches for specific workspaces to which you have access.
<input checked="" type="checkbox"/>	Administration	<input checked="" type="checkbox"/>	Manage the properties and members of your workspace

[Select All](#)
 [Clear All](#)

Module Details page

Use the Module Details page to select which modules to copy to the selected workspaces.

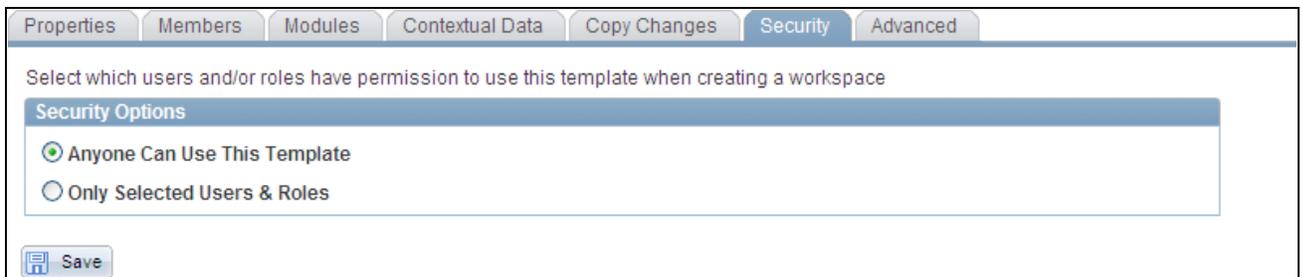


Related Pagelets page

Use the Related Pagelets page to select which modules to copy to the selected workspaces.

Defining Template Security

Access the Administration - Security page (in a workspace template, click the Administration link; select the Security tab).



Administration - Security page

Security Options

Anyone Can Use This Template

Select if you want this template to be available for selection without any user security restrictions.

Only Selected Users & Roles

Select if you want to this template to be available for selection only by the specific users and roles you specify in the Users/Roles group box. When you select this option, the Users/Roles group box displays.

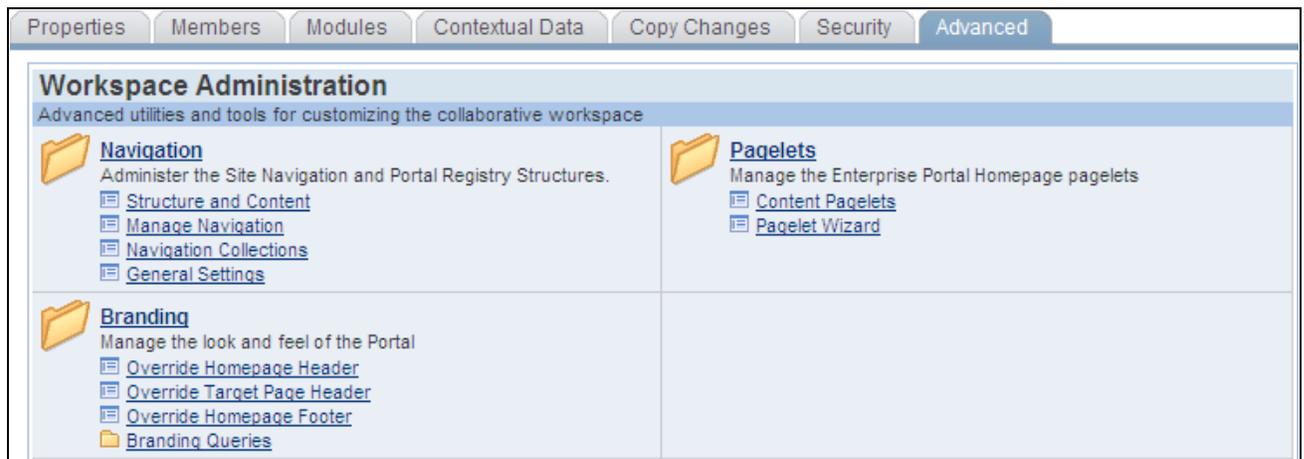
Users/Roles

The Users/Roles group box displays when the Only Selected Users & Roles option is selected.

Type	<p>Select the type of member you want to be able to access this workspace template. Available values include:</p> <p><i>Role.</i> Select to be able to select a role, or group of users, in the Member Name field. Available roles are defined in the Roles component.</p> <p>See <i>Enterprise PeopleTools 8.50 PeopleBook: Security Administration</i>, "Setting Up Roles"</p> <p><i>User.</i> Select to be able to select a user in the Member Name field. Available users are defined in the User Profiles component.</p> <p>See <i>Enterprise PeopleTools 8.50 PeopleBook: Security Administration</i>, "Administering User Profiles"</p>
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Configuring Advanced Options for a Template

Access the Administration - Advanced page (in a workspace template, click the Administration link; select the Advanced tab).



Administration - Advanced page

Navigation	<p>Access utilities and tools that enable you to implement advanced navigation configurations for the workspace template. Add new modules to the workspace or access Pagelet Wizard to create new pagelets for use with the workspace.</p> <p>See <i>PeopleSoft Enterprise Portal 9.1 PeopleBook: Portal and Site Administration</i>, "Publishing to a Site," Using Manage Navigation.</p> <p>See <i>Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology</i>, "Administering Portals"</p>
Pagelets	<p>Access utilities and tools that enable you to implement advanced pagelet configurations for the workspace template.</p> <p>See <i>Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology</i>, "Using Pagelet Wizard"</p>

Branding

Access utilities and tools that enable you to change the appearance of the portal.

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Branding*, "Setting Up PeopleSoft Enterprise Portal Branding."

Importing and Exporting Template Data

See the release notes on My Oracle Support for information about importing and exporting workspace data.

See My Oracle Support, Knowledge, Portal Solutions, Enterprise Portal.

Chapter 3

Creating Collaborative Workspaces

This chapter provides an overview of workspace creation and discusses how to:

- Create root-level workspaces.
- Create child workspaces.
- Create and update workspaces in batch mode.

Understanding Workspace Creation

In Oracle's PeopleSoft Enterprise Portal, when you create a collaborative workspace, you can create the workspace at the root of the workspace hierarchy or as a child of any existing workspace. When you create a root-level workspace, you typically use the five-step workspace creation wizard to guide you through the process of selecting a template, selecting workspace modules, and so on. When you create a child workspace, many of the characteristics of the parent workspace are inherited by the child by default and only one step is required to name the workspace and select a template.

The following example of the Workspaces - Hierarchy page shows four root-level workspaces. One of the root-level workspaces, Wiki WS, has a child workspace:



Example of root-level workspaces and child workspaces

Collaborative workspaces can also be created and updated in batch mode. When you create or update workspaces in batch mode, you specify the workspace attributes to create or update in XML following the specifications of the workspace DTD.

You can create a workspace from each of the following locations:

- From the Workspaces - Search page.

From this page, you can create a root-level workspace only.

- From the Workspaces - Hierarchy page.

From this page, you can create a root-level workspace or a child workspace.

- From the Create Workspace menu item.

From this menu item, you can create a root-level workspace only.

- From the My Workspaces pagelet.

From this pagelet, you can create a root-level workspace only.

- From the Batch Create Workspaces page.

From this page, you can create root-level workspaces only.

- Directly from the PeopleSoft application transaction for which you are creating the workspace when the Related Links related content service has been added to the transaction page.

From the Related Links service, you can create a root-level workspace only. The benefits of creating a workspace from the Related Links service include:

- The workspace automatically includes a link back to the PeopleSoft application transaction in the Links module.
- If the option is selected when the workspace is created, the workspace can include discussions related to the PeopleSoft application transaction.
- Directly from the transaction for which you are creating the workspace when the Related Workspaces pagelet has been assigned to the transaction page with Context Manger.

From this pagelet, you can create a root-level workspace only. The benefits of creating a workspace from the Related Workspaces pagelet include:

- On the Select a Workspace Template page, the workspace creation wizard prompts you with any available recommended workspace templates associated with the transaction.
- On the Relate Workspace to a Transaction page, the workspace creation wizard populates applicable contextual data fields with values from the selected transaction.
- The workspace automatically includes a link back to the transaction page in the Links module.

Note. The Workspaces - Search page and the Workspaces - Hierarchy page are also available through the Browse Workspaces module of each workspace.

Creating Root-Level Workspaces

This section discusses how to use the workspace creation wizard to create a root-level workspace by:

1. Selecting a workspace template.

2. Relating a workspace to a transaction (if applicable).
3. Naming and describing a workspace.
4. Selecting workspace modules.
5. Adding workspace members.

Pages Used to Create Root-Level Workspaces

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Select A Workspace Template	EPPCW_WIZ_TMPL	<ul style="list-style-type: none"> • Browse Workspaces Click the Create Workspace button. • Browse Workspaces Select the Workspaces - Hierarchy page. Click the Create Root Workspace button. • Portal Administration, Workspaces, Create Workspace • Click the Create Workspace link in the My Workspaces pagelet. • Click the Save button on the Create and Link Workspace page in the Related Links service. • Click the Create Workspace link in the Related Workspaces pagelet. •  Click the Select a Template button on any page in the Create A Collaborative Workspace wizard. 	Select the template on which you want to base the new workspace.

Page Name	Definition Name	Navigation	Usage
Relate Workspace to a Transaction	EPPCW_WIZ_KEYS	<ul style="list-style-type: none"> Click the Next button on the Select A Workspace Template page.  Click the Relate Workspace button on any page in the Create A Collaborative Workspace wizard. 	If the workspace template on which you are basing the creation of your workspace contains contextual data, you can use this page to relate the workspace to specific data about a transaction; otherwise, this page is skipped during workspace creation.
Name and Describe Workspace	EPPCW_WIZ_DESCR	<ul style="list-style-type: none"> Click the Next button the Relate Workspace to a Transaction page.  Click the Name and Describe Workspace button on any page in the Create A Collaborative Workspace wizard. 	Enter a name, description, and category to help identify the workspace.
Select Workspace Modules	EPPCW_WIZ_MOD	<ul style="list-style-type: none"> Click the Next button on the Name and Describe Workspace page.  Click the Select Workspace Modules button on any page in the Create A Collaborative Workspace wizard. 	Select the modules you want to include in the workspace.
Add Members (Optional)	EPPCW_WIZ_MBR	<ul style="list-style-type: none"> Click the Next button on the Select Workspace Modules page.  Click the Add Members button on any page in the Create A Collaborative Workspace wizard. 	Select and invite members to participate in the new workspace.
Create User Account	EPPCW_WIZ_EXTMBR	Click the Create Account button on the Add Members (Optional) page.	Create a system account and ID to allow an external user to access this workspace.

Step 1: Selecting a Workspace Template

Access the Select A Workspace Template page (Browse Workspaces; click the Create Workspace button on the Search page) or (Browse Workspaces; select the Hierarchy page; click the Create Root Workspace button).

Create A Collaborative Workspace
Step 1 of 5

1
2
3
4
5

Next >

Select A Workspace Template

A Collaborative Workspace is a secure shared environment for communicating and working with invited members. You can configure a new environment by selecting the appropriate template used to create the workspace.

Template: ▼

Description: Demonstration workspace template used to create workspace instances

Contextual Data: Department ID, Department

Select A Workspace Template page

Template	Select the template on which you want to base your workspace. If you have accessed this wizard directly from the transaction for which you are building this workspace and the transaction has been associated with a workspace template, a recommended template is selected by default, but can be overridden.
Description	A description of the selected template is displayed.
Contextual Data	If you have selected a template and contextual data has been defined for the template, the labels of the key fields selected to supply contextual data appear here.

Step 2: Relating a Workspace to a Transaction

Access the Relate Workspace to a Transaction page (click the Next button on the Select Workspace Template page).

Create A Collaborative Workspace
Step 2 of 5

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3
4
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< Previous
Next >

Relate Workspace to a Transaction

The workspace template that you have selected allows you to relate the workspace to specific data about a transaction. This helps to categorize your workspace and to provide relevant contextual information.

Contextual Data

Department:

Relate Workspace to a Transaction page

Note. If there is no contextual data required for this workspace, this step is skipped and the system displays step 3 automatically.

Contextual Data

If contextual data has been defined for the workspace template, the key fields selected to supply contextual data display here. In addition, if you have accessed this component directly from a transaction for which you are building this workspace, applicable values display in the key fields. If you did not access this component directly from a transaction, you can enter your own values in the key fields.

For example, if you tied a template to a customer profile transaction with a key of customer ID, you could create a workspace that is contextually tied to a customer. Another example could involve a template tied to a help desk transaction with a key of case ID. You could create a workspace that is contextually tied to a specific case.

Note. While you can manually enter data on this page, we recommend that you populate these fields by creating a workspace directly from a transaction.

Step 3: Naming and Describing a Workspace

Access the Name and Describe Workspace page (click the Next button on the Relate Workspace to a Transaction page).

Create A Collaborative Workspace
Step 3 of 5

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< Previous
Next >

Name and Describe Workspace

Enter a name, description and category in order to identify your workspace.

***Name:**

Description:

Category:

Name and Describe Workspace page

- Name** Enter a name for the workspace. The name of the workspace appears in the header on the workspace homepage, at the top of the workspace menu, and anywhere workspaces are listed—for example, on pages to search for or manage workspaces, in pagelets, in search results, and so on.
- Description** Enter an optional description for the workspace.
This description also becomes the default welcome text, which is displayed in the Welcome module if that module is configured for this workspace.
- Category** Select a category for the workspace.
If a category has been defined for the workspace template, the category displays by default. You can select a different category if the template definition specifies that the category can be overridden.

You can also use the Administration - Properties page accessed from the workspace to modify the workspace name, description, category, and other attributes.

Step 4: Selecting Workspace Modules

Access the Select Workspace Modules page (click the Next button on the Name and Describe Workspace page).

Create A Collaborative Workspace
Step 4 of 5

12345

< Previous
Next >

Select Workspace Modules

Select which Workspace Modules you would like to use or click Next to accept the default setting.

Select	Module Name	Description
<input checked="" type="checkbox"/>	Action Item Lists	Maintain multiple Action Item Lists with members
<input checked="" type="checkbox"/>	Administration	Manage the properties and members of your workspace
<input checked="" type="checkbox"/>	Browse Workspaces	Access related collaborative workspaces or perform searches for specific workspaces to which you have access.
<input checked="" type="checkbox"/>	Calendar	Maintain Calendar Events with members
<input checked="" type="checkbox"/>	Discussions	Maintain multiple discussion topics with members
<input checked="" type="checkbox"/>	Documents	Upload, organize and securely share documents with other members of the workspace
<input checked="" type="checkbox"/>	Links	Maintain a list of easily accessible links for the team
<input checked="" type="checkbox"/>	Members	View a list of all members with links to user profiles
<input checked="" type="checkbox"/>	Polls	Maintain the workspace poll questions
<input checked="" type="checkbox"/>	Related Data	Display related data pagelets for a specific workspace template
<input checked="" type="checkbox"/>	Welcome	The overview page of the collaborative workspace

Select Workspace Modules page

Modules selected in the workspace template are selected by default on this page. You can select or remove modules as appropriate to your workspace. Removing a module simply hides the link to the module. Data is preserved and no activity in the module is deleted. If you select to include the module in the workspace in the future, all data present prior to its removal will still be available.

If you selected the Base Workspace Template, then the Member, Administration, and Welcome modules are required and cannot be deleted from the workspace. If you selected the Base Workspace Template Wiki, then the Member, Administration, and Wiki Content modules are required and cannot be deleted from the workspace.

You can also use the Administration - Modules page accessed from the workspace to add and remove workspace modules.

Step 5: Adding Workspace Members

Access the Add Members (Optional) page (click the Next button on the Select Workspace Modules page).

Create A Collaborative Workspace
Step 5 of 5

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< Previous
Finish

Add Members (Optional)

If you do not wish to add members now, you can always add them later from the Administration module within the workspace. Each member will receive an invitation by email with instructions and a link to your workspace.

Members				
Send Invite	*Type	*Member Name	*Privilege Set	
<input checked="" type="checkbox"/>	User ▼	THEME1 🔍	Owner ▼	Delete

Select All Clear All

Add Workspace Member
Create User Account

Add Members (Optional) page

You can add members and create a user account using this page when you create the workspace. If the workspace template contains definitions for default members, those members will display on this page. You can also use the Administration - Members page accessed from the workspace to add and remove members.

See [Chapter 4, "Administering Collaborative Workspaces," Administering Workspace Members, page 69.](#)

Adding Workspace Members

Send Invite

Select to send a notification to the selected members alerting them that they have been added as a member to the workspace. The default notification text will be used and includes a link to the workspace homepage. Alternatively, you can send notifications after the workspace has been created, which also allows you to modify the notification text on the Set Invitation Message page.

See [Chapter 4, "Administering Collaborative Workspaces," Sending Invitations to Workspace Members, page 71.](#)

Type	<p>Select the type of member you want to add to the workspace. To be able to select <i>Administrator</i> or <i>Owner</i> in the Privilege Set field, you must select the <i>User</i> value here.</p> <p>Available values include:</p> <p><i>Role.</i> Select to be able to select a role in the Member Name field. Available roles are derived from PeopleSoft roles defined on the Roles page.</p> <p>See <i>Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology, "Setting Up Roles"</i></p> <p><i>User.</i> Select to be able to select a user in the Member Name field. Available users are derived from PeopleSoft users defined on the User Profiles page.</p> <p>See <i>Enterprise PeopleTools 8.50 PeopleBook: Security Administration, "Administering User Profiles"</i></p>
Member Name	Select a name from the list of roles or users.
Privilege Set	<p>Select a privilege level you want to assign to the member. To be able to assign the <i>Administrator</i> or <i>Owner</i> privilege level to a member, you must have selected <i>User</i> in the Type field. Available values are:</p> <p><i>Administrator.</i></p> <p><i>Approver.</i></p> <p><i>Contributor.</i></p> <p><i>Moderator.</i></p> <p><i>Owner.</i></p> <p><i>Viewer.</i></p> <p>See Chapter 4, "Administering Collaborative Workspaces," Understanding Workspace Privilege Sets, page 60.</p>
Add Workspace Member	Click to add another member to the workspace.
Create User Account	<p>Click to access the Create User Account page that enables you to enter a new user name and email account for an external member.</p> <hr/> <p>Note. The Create User Account button appears only if the Enable External Users option has been set on the Installation Options page.</p> <hr/> <p>See Chapter 2, "Setting Up Collaborative Workspace Options and Templates," Setting System Options, page 10.</p>
Finish	Click to finish workspace creation and access the workspace homepage.

Creating an External User Account

Access the Create User Account page.

Create User Account page

Use the Create User Account page to create an account to allow an external user to access this workspace. The system user ID will be based on the email address you enter. The name will be used as the description in the PeopleTools user profile. A dynamically created password will be mailed to the user enabling access to the workspace. When the external user logs in to the workspace for the first time, the Change Password page is displayed and they are asked to change the password that was sent in the invitation.

Email	Enter a valid email address. The system user ID generated from this email address will be truncated at the @ sign. For example, an email address of first.last@xyz.com will result in a user ID of FIRST.LAST.
Name	Enter a description for this account. This will be used as the description in the PeopleTools user profile.
Matching Accounts	After you enter a valid email address and exit the Email field, if a matching email address is found in the system, the Matching Accounts group box appears displaying matching accounts.
Create Account	Click the Create Account button to create a new external user account and return to the Add Members (Optional) page.
Cancel and Previous	Click either button to return to the Add Members (Optional) page without creating the external user account.
Finish	The Finish button is not active on this page. Click Create Account or Cancel.

External user information can be accessed and managed from the Manage External User page.

See [Chapter 4, "Administering Collaborative Workspaces," Managing External User Accounts for Workspaces, page 89.](#)

Creating Child Workspaces

This section discusses how to create a child workspace.

Page Used to Create Child Workspaces

Page Name	Definition Name	Navigation	Usage
Create Child Workspace	EPPCW_WS_CREATE	Browse Workspaces Select the Workspaces - Hierarchy page. Select a parent workspace.  Click the Create Child Workspace button.	Create a child workspace of the selected parent.

Creating a Child Workspace

Access the Create Child Workspace page (select a parent workspace and click the Create Child Workspace button on the Workspaces - Hierarchy page).

Create Child Workspace

Specify the workspace name, description and workspace template. The Copy Members Option specifies whether members are copied from the parent workspace, the template selected or members are not to be copied (the creator of the workspace is the sole member).

*Name:

Description:

Template: ▼

Copy Members Option

Copy From The Workspace

Copy From The Template

Do Not Copy Members

Create Child Workspace page

Use the Create Child Workspace page to create a child of the parent workspace. As an alternative to the five steps of the workspace wizard, this page allows you to specify the name, description, template, and default members in one step. If the child workspace uses the same template as the parent, then the default option is to copy workspace members from the parent. If the child workspace uses a different template, then the default option is to copy workspace members from the template.

Name	Enter a name for the workspace. The name of the workspace appears in the header on the workspace homepage, at the top of the workspace menu, and anywhere workspaces are listed—for example, on pages to search for or manage workspaces, in pagelets, in search results, and so on.
Description	Enter an optional description for the workspace. This description also becomes the default welcome text, which is displayed in the Welcome module if that module is configured for this workspace.
Template	Select the template on which you want to base your child workspace. The template used by the parent workspace is selected by default, but can be overridden.
Copy Members Option	Select the copy option: <ul style="list-style-type: none"> • <i>Copy From The Workspace</i> — Copies the members from the parent workspace. <hr/>Note. When the child's template is the same as the parent's, this option is selected by default.<hr/> • <i>Copy From The Template</i> — Copies the members from the template. <hr/>Note. When the child's template is different from the parent's, this option is selected by default.<hr/> • <i>Do Not Copy Members</i> — No members are added to the workspace by default.

Creating and Updating Workspaces in Batch Mode

This section discusses how to run the process to create and update workspaces in batch mode.

Pages Used to Create and Update Workspaces in Batch Mode

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Batch Create Workspaces	EPPCW_IMPORT_RUN	Portal Administration, Workspaces, Batch Create Workspaces, Batch Create Workspaces	Specify the XML and other parameters for the workspace batch process.
Document Type Definition (DTD)	EPPCW_IMPRTDTD_SBP	Click the View Document Type Definition (DTD) link on the Batch Create Workspaces page.	Review the DTD that provides the specification for the XML for the workspace batch process.

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Sample XML File	EPPCW_IMPRTXML_SBP	Click the View Sample XML File link on the Batch Create Workspaces page.	View example XML that can be copied and modified to be the input to the workspace batch process.

Running the Process to Create and Update Workspaces in Batch Mode

This section discusses how to:

- Create and update workspaces in batch.
- Review the DTD.
- View the example XML.
- Modify XML attributes for workspace creation and update.

Creating and Updating Workspaces in Batch

Access the Batch Create Workspaces page (Portal Administration, Workspaces, Batch Create Workspaces, Batch Create Workspaces).

Batch Create Workspaces

Run Control ID: Test [Report Manager](#) [Process Monitor](#)

User ID: VP1

The XML file contains data about workspaces that are to be created. Optionally, the batch process can send email notifications to workspace owners about their new workspaces. You may specify an XML file to import or paste the XML into the space provided below.

[View Document Type Definition \(DTD\)](#) [View Sample XML File](#)

Notify Workspace Owners

Batch Create Workspaces page

Use the Batch Create Workspaces page to specify the XML and other parameters for the workspace batch process (EPPCW_IMPORT). The EPPCW_IMPORT Application Engine program returns a standard processing log for the job and an XML file of any workspaces that had errors and were not created by the process—for example, workspaces that had blank values for required elements. You can correct the XML blocks and resubmit them for processing.

Report Manager	<p>Click to access the Report Manager module to view report results.</p> <p>See <i>PeopleTools 8.50 PeopleBook: PeopleSoft Process Scheduler</i>, Using Report Manager.</p>
Process Monitor	<p>Click to access the Process Monitor to view the status of job requests.</p> <p>See <i>PeopleTools 8.50 PeopleBook: PeopleSoft Process Scheduler</i>, Using Process Monitor.</p>
Run / Schedule	<p>Click to schedule and run this process.</p> <p>Process Scheduler runs the EPPCW_IMPORT process at the user-defined time.</p> <p>See <i>PeopleTools 8.50 PeopleBook: PeopleSoft Process Scheduler</i>, Submitting and Scheduling Process Requests.</p>
View Document Type Definition (DTD)	<p>Click to review the DTD that provides the specification for the XML for the workspace batch process.</p> <p>See Chapter 3, "Creating Collaborative Workspaces," Reviewing the DTD, page 56.</p>
View Sample XML File	<p>View example XML that demonstrates how to create and update workspaces.</p> <p>Copy and modify this XML to be the input to the workspace batch process. Save the XML as a file, or paste the modified XML directly into the text box.</p> <p>See Chapter 3, "Creating Collaborative Workspaces," Viewing the Example XML, page 56.</p>
Select File	<p>Click to browse to a local file that you want to use to create or modify workspaces in batch mode.</p>
text box	<p>Insert the XML defining the workspaces to be created or updated.</p> <p>See Chapter 3, "Creating Collaborative Workspaces," XML Attributes for Workspace Creation and Update, page 56.</p>
Notify Workspace Owners	<p>Select this option to send an email to the owner of each workspace indicating that the workspace has been created or modified.</p>

The output file is named EPPCW_BATCH_ERROR.xml and is written to the application server. Use the Process Monitor to access the log file.

Reviewing the DTD

Access the Document Type Definition (DTD) page (click the View Document Type Definition (DTD) on the Batch Create Workspaces page).

Use the Document Type Definition (DTD) page to review the DTD, which provides the specification for the XML for the workspace batch process. The workspace DTD is included here for reference:

```
<!DOCTYPE WORKSPACES [
<!ELEMENT workspaces (workspace+)>
<!ELEMENT workspace (portalname, description, welcometext, invitationtext,→
category, template, validfrom, validto, members, keys)>
<!ELEMENT members (member+)>
<!ELEMENT keys (key+)>
<!ELEMENT portalname (#CDATA)>
<!ELEMENT description (#CDATA)>
<!ELEMENT welcometext (#PCDATA)>
<!ELEMENT invitationtext (#PCDATA)>
<!ELEMENT category (#CDATA)>
<!ELEMENT template (#CDATA)>
<!ELEMENT member (name, type, privilege)>
<!ELEMENT key (keyname, keyvalue, keydescr, keyshow)>
<!ELEMENT name (#CDATA)>
<!ELEMENT type (#CDATA)>
<!ELEMENT privilege (#CDATA)>
<!ELEMENT keyname (#CDATA)>
<!ELEMENT keyvalue (#CDATA)>
<!ELEMENT keydescr (#CDATA)>
<!ELEMENT keyshow (#CDATA)>
<!ATTLIST workspace mode (ADD|UPDATE)>
]>
```

Viewing the Example XML

Access the Sample XML File page (click the View Sample XML File link on the Batch Create Workspaces page).

Use the Sample XML File page to view example XML that demonstrates how to create and update workspaces. You can copy and modify this XML to be the input to the workspace batch process. Save the XML as a file, or paste the modified XML directly into the text box on the Batch Create Workspaces page.

See [Chapter 3, "Creating Collaborative Workspaces," XML Attributes for Workspace Creation and Update, page 56.](#)

XML Attributes for Workspace Creation and Update

Copy the delivered sample XML and modify it to create or update specific workspaces. To create or update multiple workspaces, copy and modify the block of XML for each workspace you are modifying or creating.

The workspace DTD specifies the following XML elements:

<workspaces> Requires at least one <workspace> element.

<workspace>	Each <workspace> element corresponds to a workspace and has two attributes: <ul style="list-style-type: none">• title = Enter the name of the workspace. This is a required attribute for ADD mode only.• mode= Enter <i>ADD</i> or <i>UPDATE</i>. If you are updating the workspace, then the portal name becomes a required attribute.
<portalname>	Enter the name of the portal. This is a required attribute for UPDATE mode only.
<description>	Optional attribute. Enter a text string describing the workspace.
<welcometext>	Optional attribute. Enter text that you want to appear as a welcome message in the Welcome pagelet.
<invitationtext>	Optional attribute. Enter the text that is sent out in an email as an invitation to participate in the workspace.
<category>	Optional attribute. Enter the name of the category you want to assign to the workspace.
<template>	Optional attribute. Enter the template name for the workspace.
<validfrom>	Optional attribute. Enter the date that the workspace becomes valid.
<validto>	Optional attribute. Enter the date that the workspace is no longer valid.
<members>	Each <workspace> element requires a <members> element, which in turn requires at least one <member> element.

<member>

Each <member> element corresponds to a workspace member and has three required elements:

- **<name>**
The user ID or role name for the workspace member.
- **<type>**
Enter *USER* or *ROLE*.
- **<privilege>**
Enter one of the following values:
 - *EPPCW_OWNER*
 - *EPPCW_ADMIN*
 - *EPPCW_APPROVER*
 - *EPPCW_VIEWER*
 - *EPPCW_MODERATOR*
 - *EPPCW_VIEWER*

<keys>

The <keys> element is optional and is only valid when the workspace template defines contextual keys. If used, then at least one <key> element must be defined.

<key>

Each <key> element corresponds to a contextual data key for the workspace and has four required elements:

- **<keyname>**
The name for the contextual data key.
- **<keyvalue>**
The value of the contextual key.
- **<keydescr>**
The custom label for the contextual data key.
- **<keyshow>**
Enter *Y* or *N* to indicate whether the key is displayed in the workspace menu on the homepage.

Note. The <keyshow> parameter is equivalent to the Display option on the Administration - Contextual Data page.

Chapter 4

Administering Collaborative Workspaces

This chapter provides an overview of workspace administration and workspace privilege sets, and discusses how to:

- Set up a workspace.
- Designate the content and layout of the workspace homepage.
- Manage the status of workspaces.
- Move a workspace in the workspace hierarchy.
- Import and export workspace data.
- Manage external user accounts for workspaces.

Understanding Workspace Administration

In Oracle's PeopleSoft Enterprise Portal, workspace administration tasks occur inside and outside of the workspace itself. This chapter covers both types of activities.

To get a workspace ready for use by workspace members, the workspace administrator is responsible for doing the following within the workspace:

1. Setting up the workspace—that is, adding workspace members, selecting workspace modules, and so on.
2. Designating the content and layout of the workspace homepage.

After a workspace is up and running, additional administrative tasks can include:

- Managing the status of workspaces—that is, inactivating or reactivating workspaces, deleting workspaces, or setting workspaces to read-only.
- Moving a workspace in the workspace hierarchy.
- Importing and exporting workspace data.
- Managing external user accounts for workspaces.

Understanding Workspace Privilege Sets

This section provides an overview of workspace privileges and discusses:

- Welcome module privilege
- Wiki Content module privileges
- Discussions module privileges
- Documents module privileges
- Blogs module privileges
- Links module privileges
- Action Item Lists module privileges
- Calendar module privileges
- Members module privileges
- Related Data module privileges
- Polls module privileges
- Browse Workspaces module privileges
- Administration module privileges

Workspace Privileges

When you add a member to a workspace, you assign them one of the following delivered privilege sets:

- Owner
- Administrator
- Approver
- Moderator
- Contributor
- Viewer

This security defined for a member at the workspace level defines a member's privileges at the workspace module level. For example, a member defined as a viewer for a workspace, will have viewer privileges in all modules.

Note. There is a Manager Permission List that is available on the Installation Options page. This permission lists enables a high-level user to create and manage workspaces and manage existing workspaces by activating, deactivating, or deleting a workspace. Workspace access and actions are restricted by member privileges on the Workspace definition.

Welcome Module Privilege

The following table shows the Welcome-module-related privilege.

Privilege	Privilege Set
Change layout and modify content.	Owner, Administrator

Wiki Content Module Privileges

The following table shows the Wiki Content module-related privileges provided by applicable privilege sets.

Privilege	Privilege Set
Contribute wiki content.	Owner, Administrator, Approver, Moderator, Contributor
View wiki content.	Owner, Administrator, Approver, Moderator, Contributor, Viewer

Discussions Module Privileges

The following table shows the Discussion module-related privileges provided by applicable privilege sets.

Privilege	Privilege Set
Add and delete topics (individual).	Owner, Administrator, Moderator, Contributor
Add and delete responses (individual).	Owner, Administrator, Moderator, Contributor
Add and delete topics (all).	Owner, Administrator, Moderator
Add and delete responses (all).	Owner, Administrator, Moderator
View topics and responses.	Owner, Administrator, Moderator, Contributor, Viewer

Documents Module Privileges

The following table shows the Documents module-related privileges provided by applicable privilege sets.

Privilege	Privilege Set
Add and delete pieces of content.	Owner, Administrator, Approver, Moderator, Contributor
Add and delete folders.	Owner, Administrator, Approver, Moderator, Contributor
View hierarchy and content.	Owner, Administrator, Approver, Moderator, Contributor, Viewer

Privilege	Privilege Set
Approve content.	Owner, Administrator, Approver

Blogs Module Privileges

The following table shows the Discussion module-related privileges provided by applicable privilege sets.

Privilege	Privilege Set
Manage blog.	Owner, Administrator, Moderator
Add blog posts.	Owner, Administrator, Approver, Moderator, Contributor
Add comments and replies.	Owner, Administrator, Approver, Moderator, Contributor
View blog posts.	Owner, Administrator, Approver, Moderator, Contributor, Viewer

Links Module Privileges

The following table shows the Links module-related privileges provided by applicable privilege sets.

Privilege	Privilege Set
Add and delete links. (individual)	Owner, Approver, Moderator, Contributor
Add and delete links. (all)	Owner, Administrator
Add and delete folders. (individual)	Owner, Approver, Moderator, Contributor
Add and delete folders. (all)	Owner, Administrator
View hierarchy and content	Owner, Administrator, Moderator, Contributor, Viewer

Action Item Lists Module Privileges

The following table lists privileges for the Action Item Lists module and the related privilege sets.

Privilege	Privilege Set
Add/edit any action item	Owner, Moderator, Administrator, Contributor, Approver
Delete any action item	Owner, Moderator, Administrator
Delete list.	Owner, Moderator, Administrator
Delete own action items	Owner, Moderator, Administrator, Contributor Approver

Privilege	Privilege Set
View action items	Owner, Moderator, Administrator, Contributor, Viewer, Approver
Edit List	Administrator, Owner, Moderator

Calendar Module Privileges

The following table lists privileges for the Calendar module and the related privilege sets.

Privilege	Privilege Set
View events.	Administrator, Contributor, Viewer
Add events.	Administrator, Contributor
Edit own events.	Administrator, Contributor
Delete own events.	Administrator, Contributor
Edit any event.	Administrator
Delete any event.	Administrator
Edit calendar properties.	Administrator
Add a calendar.	Administrator
Delete a calendar	Administrator

Members Module Privileges

The following table shows the Members module-related privileges provided by applicable privilege sets.

Privilege	Permission Level
Add and delete members.	Owner, Administrator
Change profile details. (individual)	Owner, Administrator, Moderator, Contributor
Change profile details. (all)	Owner, Administrator
View members and profiles.	Owner, Administrator, Moderator, Contributor, Viewer

Related Data Module Privileges

The following table shows the Related Data module-related privileges provided by applicable privilege sets.

Privilege	Privilege Set
Add and delete pagelets.	Owner, Administrator
Change layout.	Owner, Administrator

Polls Module Privileges

The following table lists privileges for the Community Calendars module and the related privilege sets.

Privilege	Privilege Set
Access poll results.	Administrator, moderator, publisher,
Assign members.	Administrator, moderator
Assign respondents.	Administrator, moderator, publisher,
Delete poll definition.	Administrator
Delete questions and responses.	Administrator, moderator, publisher,
Edit poll metadata.	Administrator, moderator, publisher,
Publish as pagelet.	Administrator, publisher,
Update questions.	Administrator, author, moderator, publisher
View poll definition.	Administrator, author, moderator, publisher, viewer

Browse Workspaces Module Privileges

All workspace members have access to this module.

Administration Module Privileges

The following table shows the Administration module-related privileges provided by applicable privilege sets.

Privilege	Privilege Set
Add/delete pagelets.	Owner, Administrator
Add modules.	Owner, Administrator
Change workspace properties.	Owner, Administrator
Delete modules.	Owner, Administrator

<i>Privilege</i>	<i>Privilege Set</i>
Edit workspace layout.	Owner, Administrator
Update contextual data.	Owner, Administrator
Update valid dates.	Owner
Update welcome text.	Owner, Administrator

Setting Up a Workspace

This section discusses how to:

- Administer workspace properties.
- Administer workspace members.
- Administer workspace modules.
- Define Documents module properties.
- Select pagelets for the Related Pagelets module.
- Administer contextual data.
- Administer workspace feeds.
- Configure advanced options for a workspace.

Pages Used to Define Details of Workspaces

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Administration - Properties	EPPCW_ADMIN_PROP	In the workspace menu, click the Administration link.	Enter detailed properties of a workspace including a name, description, category, valid dates, and welcome text.
Select Category	EPPCW_CATG_SELECT	Click the Search Categories button on the Administration - Properties page.	Select the category you want to assign to the workspace. See Chapter 2, "Setting Up Collaborative Workspace Options and Templates," Setting Up the Workspace Category Hierarchy, page 13.

Page Name	Definition Name	Navigation	Usage
Administration - Members	EPPCW_ADMIN_MBR	In the workspace menu, click the Administration link. Select the Members tab.	Manage the membership settings of a workspace.
Invitation Message	EPPCW_ADMIN_INVITE	Click the Invitation Message link on the Administration - Members page.	Write a member invitation message that you want to use as the default to invite members to participate in the workspace.
Create User Account	EPPCW_ADMIN_EXTUSR	Click the Create User Account link on the Administration - Members page.	Create a new account for an external user or lookup existing external accounts by email address.
Administration - Modules	EPPCW_ADMIN_MOD	In the workspace menu, click the Administration link. Select the Modules tab.	Select the modules that you want to include in the workspace.
Documents Module Properties	EPPCW_DC_CATGOPTS	In the workspace menu, click the Administration link. Select the Modules tab. Click the Properties link for the Documents module.	Determine properties for the Documents module such as whether checkouts, approvals, and version control are enabled.
Add Pagelet	EPPPB_CP_ADD	Click the Add Related Pagelet button on the Administration - Modules page.	Select a pagelet definition from a source portal, and add it to the template.
Edit Pagelet	EPPPB_CP_EDIT	Click the Edit Pagelet button for a related pagelet on the Administration - Modules page.	Edit the definition for a related pagelet.
Key Name Mapping	EPPCW_ADMIN_KEYMAP	Click the Map link for a related pagelet on the Administration - Modules page.	Specify and optionally rename the keys passed to the pagelet.
Administration - Contextual Data	EPPCW_ADMIN_KEYS	In the workspace menu, click the Administration link. Select the Contextual Data tab.	Manage contextual data associated with the workspace. For example, you can enter data that ties the workspace to one or more transaction key fields.

Page Name	Definition Name	Navigation	Usage
Publish Feed Definition (Workspace Feeds)	PTFP_PUB_AS_FEED	<ul style="list-style-type: none"> In the workspace menu, click the Administration link. <p>When a workspace feed has not been published for this workspace, select the Feed tab.</p> <ul style="list-style-type: none"> Click the Edit button on the Publish as Feed page. Click the Add Feed button on the Publish as Feed page. 	Define feed security options, enter additional feed properties, and access advanced options.
Advanced Feed Options (Workspace Feeds)	EPPCW_PUB_ADVOPT	Click the Advanced Options link on the Publish Feed Definition page.	Select the workspace modules to be published and other advanced options for a workspace feed.
Publish as Feed (Workspace Feeds)	EPPCW_PUB_AS_LIST	<ul style="list-style-type: none"> In the workspace menu, click the Administration link. <p>When one or more workspace feeds have been defined for this workspace, select the Feed tab.</p> <ul style="list-style-type: none"> Click the Publish button on the Publish Feed Definition page. Click the Cancel button on the Publish Feed Definition page. 	Review, edit, add, or delete feed definitions for this item.
Publish Feed Definition to Sites	PTFP_PUB_AS_SITES	Click the Publish Feed to Other Sites link on the Publish Feed Definition page.	Publish an existing feed to other sites.
Administration - Advanced	EPPCW_ADMIN_ADV	<p>In the workspace menu, click the Administration link.</p> <p>Select the Advanced tab.</p>	Access advanced utilities and tools for configuring the workspace.

Administering Workspace Properties

Access the Administration - Properties page (in the workspace menu, click the Administration link).

The screenshot shows the 'Properties' tab of a workspace configuration page. The fields are as follows:

- *Name:** Demo Workspace
- Description:** Demonstration workspace for Facilities Department
- Category:** (empty field with search icon) Allow category override
- Valid From:** (empty date field)
- Valid To:** (empty date field)
- Welcome Text:** (Rich text editor containing 'Demonstration workspace for Facilities Department')
- Read Only Setting:** Read Only. Text: 'The Read Only check box can be used to switch the workspace to a read only mode. All members except the owner and administrators will have "Viewer" privilege.'
- Workspace Parent:** (dropdown menu)

Administration - Properties page

- Name** The workspace name entered on the Name and Describe Workspace page displays, but can be overridden.

- Description** The workspace description entered on the Name and Describe Workspace page displays, but can be overridden.

- Category** The workspace category selected on the Name and Describe Workspace page is displayed, but can be overridden. Click the Search Categories button to access the Select Category page, where you can

- Valid From/ Valid To** Enter the span of dates during which you want the workspace to be valid.

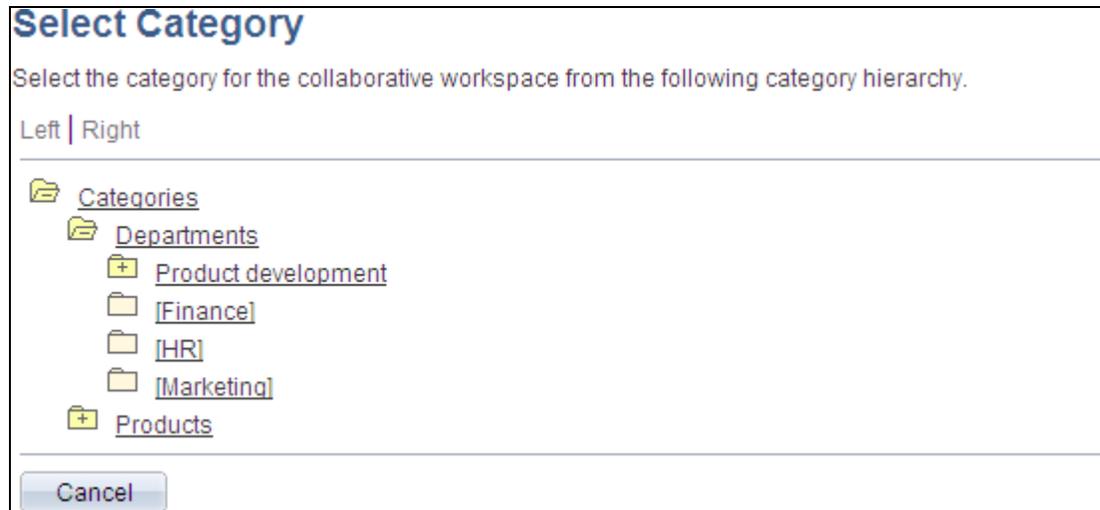
- Welcome Text** Enter text or HTML-formatted content that you want to appear as a welcome message on the Welcome pagelet.

See Enterprise PeopleTools 8.50 PeopleBook: Using PeopleSoft Applications, "Working With Pages," Working With Rich Text Editor Fields.

- Read Only** Select this option to make the workspace read-only. All members except the owner and administrators have viewer privileges only in this mode.
- Workspace Parent** Select a workspace from the drop-down list box to make that the parent workspace. Select blank to make this workspace a root workspace.

Selecting a Workspace Category

Access the Select Category page (click the Search Categories button on the Administration - Properties page).



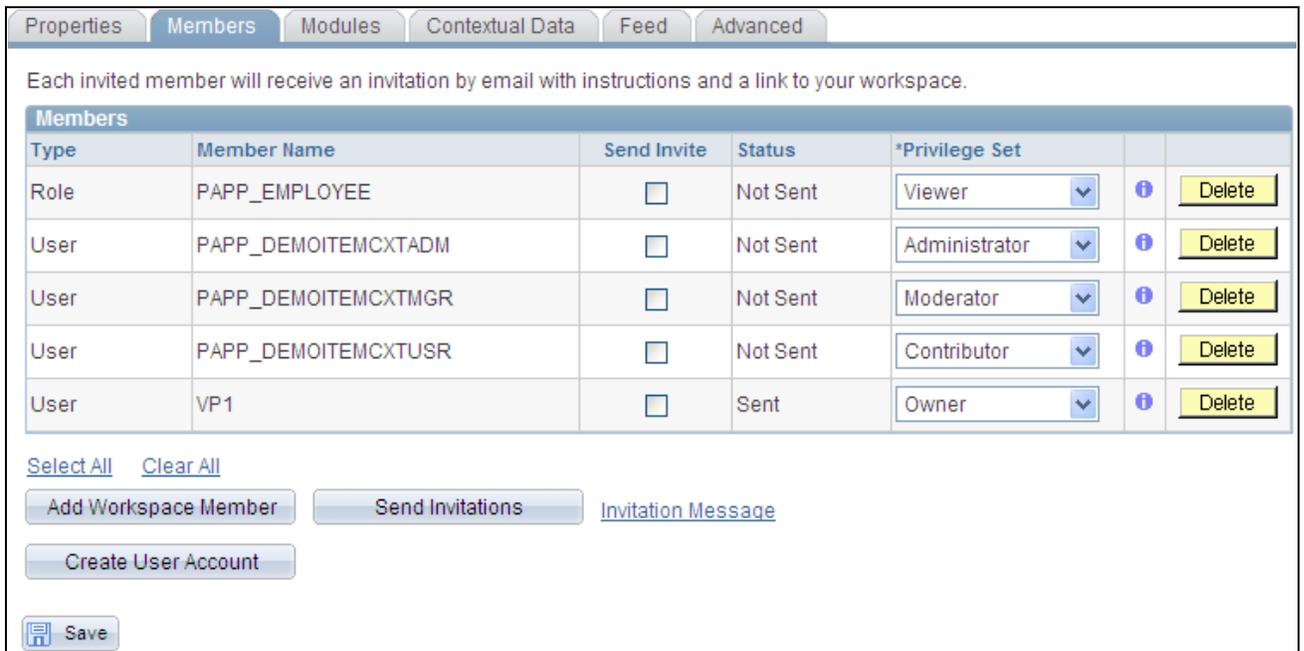
Select Category page

To select the category you want to assign to the workspace:

1. Browse the category hierarchy to view the available categories:
 - Click a + to expand a category folder and reveal its contents.
 - Click a - to collapse a category folder and hide its contents.
2. Click a link for a category to select that category for the workspace.

Administering Workspace Members

Access the Administration - Members page (in the workspace menu, click the Administration link; select the Members tab).



Administration - Members page

Adding Workspace Members

Send Invite

Select to send a notification to the selected members alerting them that they have been added as a member to the workspace. The default notification text will be used and includes a link to the workspace homepage. Alternatively, you can send notifications after the workspace has been created, which also allows you to modify the notification text on the Set Invitation Message page.

See [Chapter 4, "Administering Collaborative Workspaces," Sending Invitations to Workspace Members, page 71.](#)

Type

Select the type of member you want to add to the workspace. To be able to select *Administrator* or *Owner* in the Privilege Set field, you must select the *User* value here.

Available values include:

Role. Select to be able to select a role in the Member Name field. Available roles are derived from PeopleSoft roles defined on the Roles page.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology*, "Setting Up Roles"

User. Select to be able to select a user in the Member Name field. Available users are derived from PeopleSoft users defined on the User Profiles page.

See *Enterprise PeopleTools 8.50 PeopleBook: Security Administration*, "Administering User Profiles"

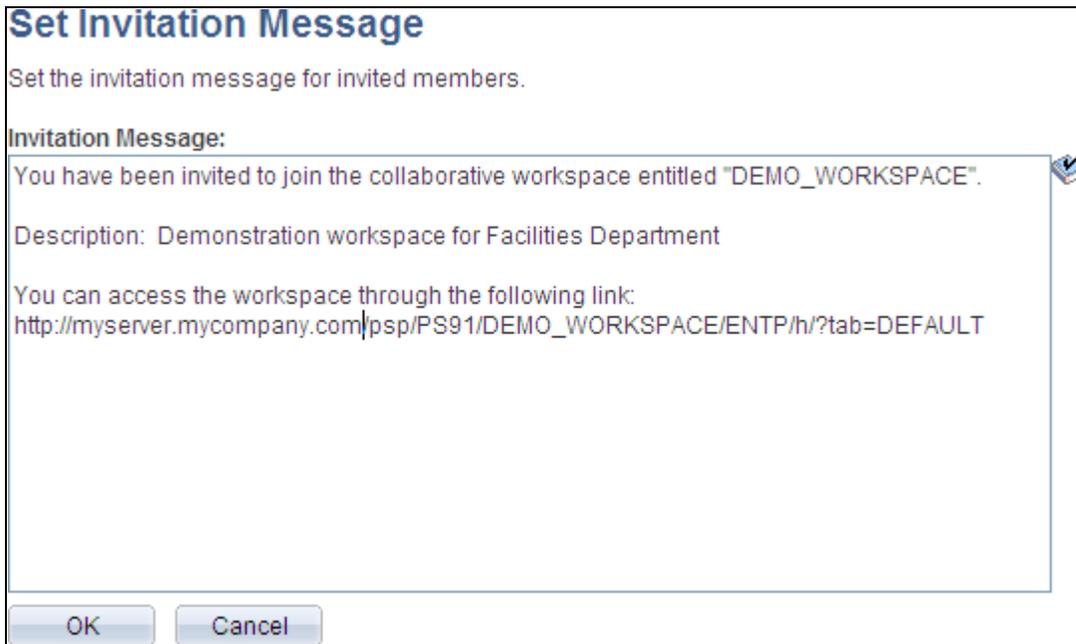
Member Name

Select a name from the list of roles or users.

Privilege Set	<p>Select a privilege level you want to assign to the member. To be able to assign the <i>Administrator</i> or <i>Owner</i> privilege level to a member, you must have selected <i>User</i> in the Type field. Available values are:</p> <p><i>Administrator.</i></p> <p><i>Approver.</i></p> <p><i>Contributor.</i></p> <p><i>Moderator.</i></p> <p><i>Owner.</i></p> <p><i>Viewer.</i></p> <p>See Chapter 4, "Administering Collaborative Workspaces," Understanding Workspace Privilege Sets, page 60.</p>
Add Workspace Member	<p>Click to add another member to the workspace.</p>
Create User Account	<p>Click to access the Create User Account page that enables you to enter a new user name and email account for an external member.</p> <hr/> <p>Note. The Create User Account button appears only if the Enable External Users option has been set on the Installation Options page.</p> <hr/> <p>See Chapter 2, "Setting Up Collaborative Workspace Options and Templates," Setting System Options, page 10.</p>
Finish	<p>Click to finish workspace creation and access the workspace homepage.</p>

Sending Invitations to Workspace Members

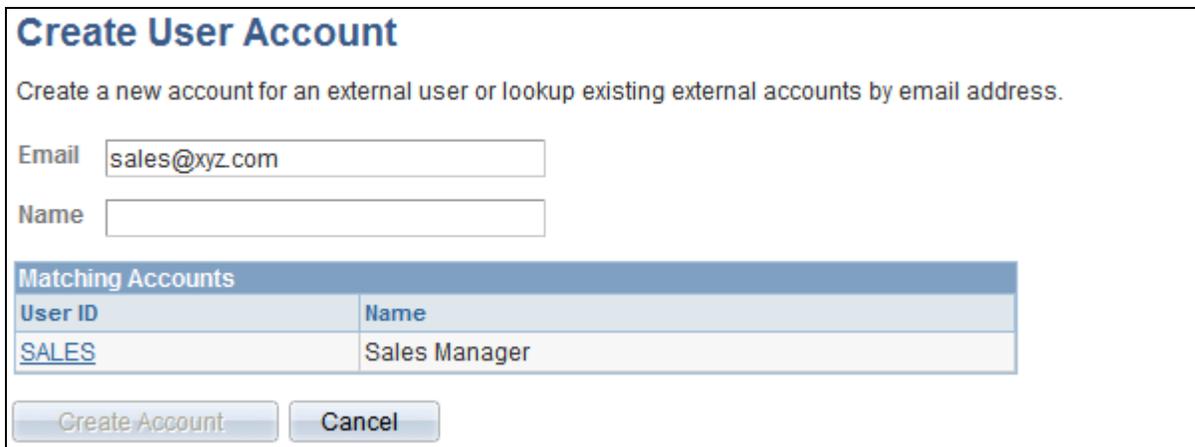
Access the Set Invitation Message page (select workspace members and click the Send Invitations button on the Administration - Members page).



Set Invitation Message page

Creating an External User Account

Access the Create User Account page (click the Create User Account button on the Administration - Members page).



Create User Account page

Use the Create User Account page to create an account to allow an external user to access this workspace. The system user ID will be based on the email address you enter. The name will be used as the description in the PeopleTools user profile. A dynamically created password will be mailed to the user enabling access to the workspace. When the external user logs in to the workspace for the first time, the Change Password page is displayed and they are asked to change the password that was sent in the invitation.

Email	Enter a valid email address. The system user ID generated from this email address will be truncated at the @ sign. For example, an email address of first.last@xyz.com will result in a user ID of FIRST.LAST.
Name	Enter a description for this account. This will be used as the description in the PeopleTools user profile.
Matching Accounts	After you enter a valid email address and exit the Email field, if a matching email address is found in the system, the Matching Accounts group box appears displaying matching accounts.
Create Account	Click the Create Account button to create a new external user account and return to the Add Members (Optional) page.
Cancel	Click either button to return to the Add Members (Optional) page without creating the external user account.

External user information can be accessed and managed from the Manage External User page.

See [Chapter 4, "Administering Collaborative Workspaces," Managing External User Accounts for Workspaces, page 89.](#)

Administering Workspace Modules

Access the Administration - Modules page (in the workspace menu, click the Administration link; select the Modules tab).

Properties Members **Modules** Contextual Data Feed Advanced

Select which modules you would like for this workspace.

Modules			
Select	Module Name	Description	Properties
<input type="checkbox"/>	Welcome	The overview page of the collaborative workspace	
<input checked="" type="checkbox"/>	Wiki Content	Edit or view wiki page content and information.	
<input checked="" type="checkbox"/>	Discussions	Maintain multiple discussion topics with members	
<input checked="" type="checkbox"/>	Documents	Upload, organize and securely share documents with other members of the workspace	Properties
<input checked="" type="checkbox"/>	Blogs	Maintaining Workspace Blog posts	
<input checked="" type="checkbox"/>	Links	Maintain a list of easily accessible links for the team	
<input checked="" type="checkbox"/>	Action Item Lists	Maintain multiple Action Item Lists with members	
<input checked="" type="checkbox"/>	Calendar	Maintain Calendar Events with members	
<input checked="" type="checkbox"/>	Members	View a list of all members with links to user profiles	
<input checked="" type="checkbox"/>	Related Data	Display related data pagelets for a specific workspace template	
<input checked="" type="checkbox"/>	Polls	Maintain the workspace poll questions	
<input checked="" type="checkbox"/>	Browse Workspaces	Access related collaborative workspaces or perform searches for specific workspaces to which you have access.	
<input checked="" type="checkbox"/>	Administration	Manage the properties and members of your workspace	

There is no related pagelet found for this workspace.

[Add Related Pagelet](#)

Administration - Modules page

The Modules group box displays module settings defined for the workspace on the Select Workspace Modules page, but can be overridden.

Select the modules you want to include in the workspace. Welcome, Members, and Administration values are selected and unavailable for editing because those modules are required in a workspace. These are modules delivered with PeopleSoft Enterprise Portal.

You can choose to remove a module even after activity has been performed in the module without losing any data. Clearing the Select option for a module simply removes link access to the module from the workspace menu; all module data is preserved. If you decide to include the module in the workspace again, all module activity that existed in the module before removal will be accessible.

The Properties link associated with a module enables you to further define the properties and options available in the module.

Defining Documents Module Options for a Workspace

Access the Documents Module Properties page (click the Properties link for the Documents module on the Administration - Modules page).

Documents Module Properties

Set the Documents module properties for this workspace. Select 'Cascade to All Child Folders' to cascade the content default approval setting to all the Document folders in this workspace. The changes take effect after saving.

Enable Content Versions

Enable Content Checkout

Enable Content Approval Cascade to All Child Folders

Enable Content Types to Add

File Attachment

Text or HTML

Managed Content

Documents Module Properties page

Enable Content Versions	Select to enable different versions of content.
Enable Content Checkout	Select to enable the check in and check out of documents posted to the Documents module of this workspace. If you select this option, fields and options enabling the check in and check out of documents display appropriately on the pages used to post documents to the Documents module.
Enable Content Approval	Select to enable the approval of documents posted to the Documents module of this workspace. If you select this option, fields and options enabling the approval of documents display appropriately on the pages used to post documents to the Documents module.
Cascade to All Child Folders	Will set the default approvals for all new content in child folders. The approval settings are transferred to all child folders when the page is saved. This setting does not affect existing child content approval settings.
Enable Text/HTML	Select to enable the posting of text and HTML documents to the Documents module of this workspace. If you select this option, the <i>Text or HTML</i> option displays on the Documents - Add Documents page in the Documents module.
Enable File Attachments	Select to enable the posting of file attachments to the Documents module of this workspace. If you select this option, the <i>File Attachment</i> option displays on the Documents - Add Documents page in the Documents module.
Enable Managed Content	Select to enable the posting of managed content to the Documents module of this workspace. If you select this option, the <i>Managed Content</i> option displays on the Documents - Add Documents page in the Documents module.

Adding or Editing a Related Pagelet in a Workspace

Access the Add Pagelet page (click the Add Related Pagelet button on the Administration - Modules page).

Access the Edit Pagelet page (click the Edit Pagelet button for an existing pagelet on the Administration - Modules page).

Add Pagelet

Select a pagelet definition from the selected source application, and add it to the current site.

*Source Application: EMPLOYEE Portal

*Pagelet Folder: Organizers

*Pagelet Name: My Feeds

Pagelet

*Pagelet ID: PAPP_EPPFP_MY_FEEDS_SCR

*Pagelet Title: My Feeds

Description:

*Pagelet Folder: PeopleSoft Applications

Pagelet Security

Publish as Public

Publish with Security Roles Author Access

Selected Security Find | View All | First 1-2 of 2 Last

*Type	Name	Description
Permission List	PAPP0002	Logged in User Access
Permission List	PAPP9000	All Enterprise Portal Objects

Homepage Tabs Find | View All | First 1-2 of 2 Last

Select	Homepage Tab	*Pagelet Behavior
<input checked="" type="checkbox"/>	Related Data	Optional - Default
<input type="checkbox"/>	Welcome	Optional

Save Cancel [Preview Pagelet](#)

Add Pagelet page

Use the Add Pagelet page to add an already defined pagelet to be available on the workspace homepage (Welcome tab) or the workspace Related Data tab.

Source Application Select the portal registry that is the source of the pagelet definition.

Pagelet Folder Select the portal folder that is the source of the pagelet definition.

Pagelet Name Select the pagelet definition.

Pagelet Name Displays the pagelet's ID.

Pagelet Title	Displays the pagelet's title, which can be modified.
Description	Enter an optional description for the pagelet.
Pagelet Folder	Select the folder in which the pagelet definition is to be stored. <i>PeopleSoft Applications</i> is the default folder for workspace pagelets.
Pagelet Security	Select a pagelet security option: <ul style="list-style-type: none"> • <i>Publish as Public</i> — Select to designate that all users can access the pagelet. • <i>Publish with Security Roles</i> — Select to use the already assigned role- or permission list-based security for the pagelet.
Author Access	Select to provide the pagelet author with access to the pagelet regardless of any security restrictions assigned to the pagelet. This access is granted based on the author's user ID.
Select	Select one or more workspace tabs for this pagelet: <ul style="list-style-type: none"> • <i>Related Data</i> — The Related Data module. • <i>Welcome</i> — The workspace homepage tab.
Pagelet Behavior	Select the default behavior for the pagelet: <ul style="list-style-type: none"> • <i>Optional</i> — The pagelet will not appear on the workspace tab. <i>Do not select this option.</i> • <i>Optional-Default</i> — The pagelet will appear on the workspace tab for all members. The pagelet position can be modified by the administrator only; the pagelet can also be removed by a member from his or her workspace homepage. • <i>Required</i> — The pagelet will appear on the workspace tab for all members. The pagelet position can be modified by the administrator only. • <i>Required-Fixed</i> — The pagelet will appear on the workspace tab for all members. The pagelet column can be modified by the administrator only; however, the pagelet will always appear at the top of the column.

Mapping Keys for Context-Sensitive Pagelets

Access the Key Name Mapping page (click the Map link for a context-sensitive pagelet on the Administration - Modules page).

Key Name Mapping

Specify and provide optional renames for the keys passed to the pagelet.

Menu Item Label: Demo Contextual Pagelet

Available Workspace Keys			
	Description	Key Name in Workspace	Key Name in Pagelet
<input checked="" type="checkbox"/>	Department ID	EO_PE_DEMO_DEPTID	<input type="text" value="EO_PE_DEMO_DEPTID"/>
<input checked="" type="checkbox"/>	Department	EO_PE_DEMO_DEPTLBL	<input type="text" value="EO_PE_DEMO_DEPTLBL"/>

OK Cancel

Key Name Mapping page

When a related pagelet is added to a workspace and is designated as being context-sensitive, the pagelet is passed the same key names and values that are associated with the workspace. These keys are passed to the pagelet as query string parameters. If needed, the key names can be overridden for a related pagelet by adding the EPPCW_KEYMAPPING attribute to the content reference representing the pagelet.

The pagelet's content reference can be accessed by clicking the Structure and Content link on the Administration - Advanced page. The syntax for the attribute value is as follows:

```
KEY1ORIGNAME=KEY1NEWNAME ;
KEY2ORIGNAME=KEY2NEWNAME ;
...
KEYNORIGNAME=KEYNNEWNAME
```

Administering Contextual Data

Access the Administration - Contextual Data page (in the workspace menu, click the Administration link; select the Contextual Data page).

Properties Members Modules **Contextual Data** Feed Advanced

Specific keys can be defined to allow the workspace to display and link to related data. If you do not know the key name, contact an administrator.

Related Keys			
Display	Key	Custom Label	
<input type="checkbox"/>	EO_PE_DEMO_DEPTID	<input type="text" value="Department ID"/>	<input type="button" value="+"/> <input type="button" value="-"/>
<input checked="" type="checkbox"/>	EO_PE_DEMO_DEPTLBL	<input type="text" value="Department"/>	<input type="button" value="+"/> <input type="button" value="-"/>

Administration - Contextual Data page

Related Keys

If this workspace was created using a template for which contextual data has been defined, the key fields selected to supply contextual data appear here. In addition, if the workspace was created directly from a transaction, applicable values appear in the key fields. If this workspace was not created directly from a transaction, you can enter your own values in the key fields.

If this workspace was created using a template that did not specify a contextual relationship, you can enter your own key fields and values.

While you can manually enter data on this page, we recommend that you populate these fields by creating a workspace from a template and directly from a transaction.

Note. Modifying existing field values or options set in this group box initiates a function that updates all workspace pagelet content reference URLs that contain an attribute of *EPPCW_PAGELET* with a value of *KEYS*. This change impacts all workspace pagelets, as well as any related pagelets associated with the workspace in which the key was modified.

Display	Select to display the contextual data in the workspace. If this option is selected, the key displays in the menu of the workspace.
Key	Enter the key field that you want to use to derive contextual data for the workspace.
Custom Label	Enter an overriding value for the key label. If you choose to display the key, this label will appear alongside the key field value below the menu of a workspace for a transaction that contains the key.

Administering Workspace Feeds

Use the Administration - Feeds page as the starting point for administering workspace feeds.

In addition to workspace modules that can be published as feeds on their own, one or more feeds can be published for the entire workspace, each of which is known as a *workspace feed*. While workspace members with sufficient privilege can publish feeds for individual workspace modules, only the workspace administrator can publish a workspace feed. In addition, the administrator is responsible for selecting which modules will be included in that feed.

The following steps provide a high-level overview of the process to administer workspace feeds:

1. In the workspace menu, click the Administration link to access the Administration module.
2. Select the Feeds page.

Depending on whether a workspace feed has already been published, one of the following pages is displayed:

- The Publish as Feed page is displayed if a workspace feed has already been published. Continue with step 3.
 - The Publish Feed Definition page is displayed if a workspace feed has not been published for this workspace. Continue with step 4.
3. Determine whether you want to edit one of the current workspace feeds, or create a new workspace feed.

On the Publish as Feed page, click Edit to edit an existing workspace feed; click Add New to create a new workspace feed.

See [Chapter 4, "Administering Collaborative Workspaces," Modifying and Saving Workspace Feed Definitions, page 80.](#)

4. Set the feed parameters, additional feed parameters, and feed security options on the Publish Feed Definition page.

See *Enterprise PeopleTools 8.50 PeopleBook: Feed Publishing Framework*, "Creating and Using Feeds," Defining and Publishing Feeds, Defining Feed Properties.

5. You must select at least one module for publishing in this workspace feed. Therefore, click the Advanced Options link.
6. Set the advanced options for the workspace feed on the Advanced Feed Options page.

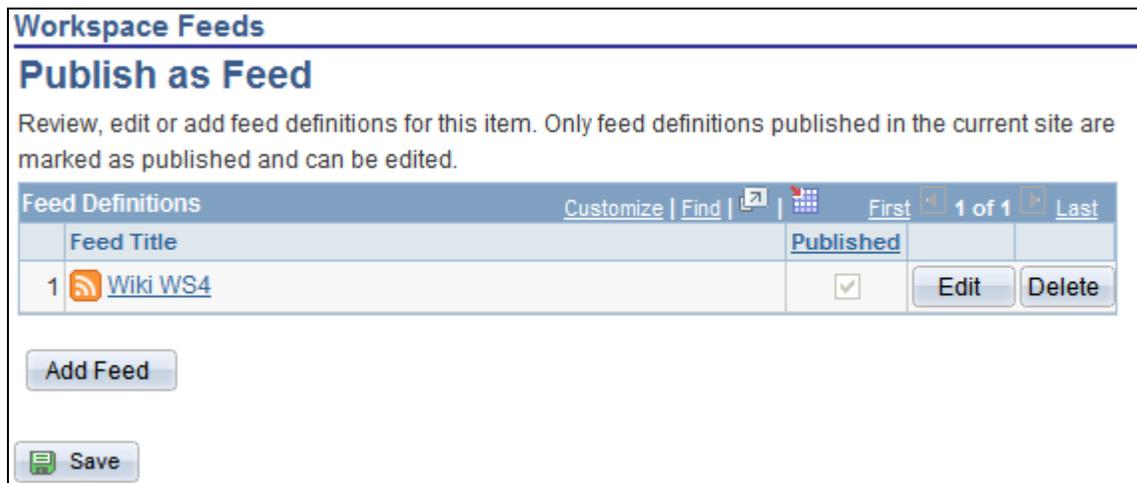
See [Chapter 4, "Administering Collaborative Workspaces," Setting Advanced Options for Workspace Feeds, page 81.](#)

7. Click OK on the Advanced Feed Options page.
8. Click the Publish button on the Publish Feed Definition page to save any new or revised feed definitions.

See [Chapter 4, "Administering Collaborative Workspaces," Modifying and Saving Workspace Feed Definitions, page 80.](#)

Modifying and Saving Workspace Feed Definitions

Access the Publish as Feed page (click Publish on the Publish Feed Definition page; alternatively, if a workspace feed definition already exists, select the Feeds page in the Administration module).



Publish as Feed page (Workspace Feeds)

Use the Publish as Feed page for workspace feeds to administer and save workspace feed definitions.

Feed Title	Click a link in this column to view the feed document for that workspace feed.
Published	Indicates whether a workspace feed is currently published.
Edit	Click to edit an existing workspace feed definition.
Delete	Click to delete an existing workspace feed definition.

Add Feed Click to add a new workspace feed definition.

Save Click to save a new feed definition or changes to existing workspace feed definitions.

Setting Advanced Options for Workspace Feeds

Access the Advanced Feed Options page (click the Advanced Options link on the Publish Feed Definition page).

Workspace Feeds

Advanced Feed Options

Specify the advanced options of this feed.

Feed: Demo Workspace

Feed Options

* Max Number of Entries:

Select the modules to be included in the feed

Discussions Documents Action Item Lists

Calendar Wiki Blog

Advanced Feed Options page (Workspace Feeds)

Use the Advanced Feed Options page for workspace feeds to determine which workspace modules will be included in the workspace feed. The workspace feed can be configured to include content from one or more of the following modules:

- Action Item Lists
- Blogs
- Calendar
- Discussions
- Documents
- Wiki Content

Note. A specific workspace module can be configured to be published in one or more or no workspace feeds.

To set advanced options for a workspace feed:

1. Set the maximum number of entries per module for this workspace feed in the Max Number of Entries field.

- From the list of available workspace modules, select those modules that you want to publish in this workspace feed.

Note. If a module has not been selected on the Administration - Modules page, then it will appear as disabled on this page.

- Click OK.

Configuring Advanced Options for a Workspace

Access the Administration - Advanced page (in the workspace menu, click the Administration link; select the Advanced tab).



Administration - Advanced page

Navigation

Access utilities and tools that enable you to implement advanced navigation configurations for the workspace.

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Portal and Site Administration*, "Publishing to a Site," Using Manage Navigation.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology*, "Administering Portals"

Pagelets

Access utilities and tools that enable you to implement advanced pagelet configurations for the workspace.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology*, "Using Pagelet Wizard"

Branding

Access utilities and tools the enable you to change the appearance of the portal.

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Branding*, "Setting Up PeopleSoft Enterprise Portal Branding."

Designating the Content and Layout of the Workspace Homepage

This section provides an overview of the workspace homepage layout and discusses how to:

- Modify the content of the workspace homepage.
- Modify the layout of the workspace homepage.

Understanding the Content and Layout of the Workspace Homepage

The workspace administrator or owner has the privileges necessary for maintaining the workspace homepage. Other workspace members have limited capabilities for customizing their workspace homepage, which is unlike their capabilities on the portal homepage. Specifically, other members cannot add or move pagelets and can only delete pagelets configured as Opt-Dflt (optional-default).

Note. Once a user has deleted a pagelet, it cannot be re-added easily to that user's homepage.

The Tab Content page is used to designate the pagelets that you want to appear on the workspace homepage. The Tab Layout page is used to modify the layout of pagelets on the homepage. The workspace administrator can also use the drag-and-drop feature to arrange the layout directly on the workspace homepage.

Pages Used to Designate the Content and Layout of the Workspace Homepage

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Tab Content	PTSYSTABCONTENT	Click the Content link on the workspace homepage.	Designate the pagelets (types of content) you want to display on the workspace homepage.
Tab Layout	PTSYSTABLAYOUT	Click the Layout link on the workspace homepage.	Designate the layout of content on the workspace homepage.

Modifying the Content of the Workspace Homepage

Access the Tab Content page (click the Content link on the workspace homepage).

Content
Layout

Tab Content

Label: Welcome

* Select the pagelets that can be used for this homepage tab definition.
 * Select the "Include all?" checkbox to display all pagelets from the portal registry for this category. This setting is used for the "Personalize Content" page.
 * Set the pagelet behavior with the drop down list next to the selected pagelet.
 * Do not choose the 'Optional' pagelet behaviour for Workspaces or Templates.

▼ PeopleSoft Applications

Include all?

<input checked="" type="checkbox"/> Blogs	Required
<input checked="" type="checkbox"/> Calendar	Required
<input type="checkbox"/> Email	Optional
<input type="checkbox"/> Enterprise Menu	Optional
<input type="checkbox"/> Feed Reader	Optional
<input checked="" type="checkbox"/> Links	Required
<input checked="" type="checkbox"/> Menu	Req-Fix
<input type="checkbox"/> My Reports	Optional
<input checked="" type="checkbox"/> Open Action Items	Required
<input checked="" type="checkbox"/> Poll	Required
<input checked="" type="checkbox"/> Recent Discussions	Required
<input checked="" type="checkbox"/> Recent Documents	Required
<input type="checkbox"/> Related Discussions	Optional
<input checked="" type="checkbox"/> Tags	Required
<input checked="" type="checkbox"/> Upcoming Events	Required
<input type="checkbox"/> Welcome	Optional
<input checked="" type="checkbox"/> Wiki Content	Req-Fix

Tab Content page

Use the Tab Content page to designate the pagelets (types of content) you want to display on the workspace homepage.

To select pagelets for the workspace homepage:

1. Select the check box for a pagelet to have it appear on the workspace homepage.

Select the Include All? check box to select all available pagelets.

- Use the drop-down list to select the pagelet behavior:

<i>Optional</i>	The pagelet will not appear on the welcome page. <i>Do not select this option.</i>
<i>Opt-Dflt (optional-default)</i>	The pagelet will appear on the workspace homepage for all members. The pagelet position can be modified by the administrator only; the pagelet can also be removed by a member from his or her workspace homepage.
<i>Required</i>	The pagelet will appear on the workspace homepage for all members. The pagelet position can be modified by the administrator only.
<i>Req-Fix (required-fixed)</i>	The pagelet will appear on the workspace homepage for all members. The pagelet column can be modified by the administrator only; however, the pagelet will always appear at the top of the column.

- Click the Save button.

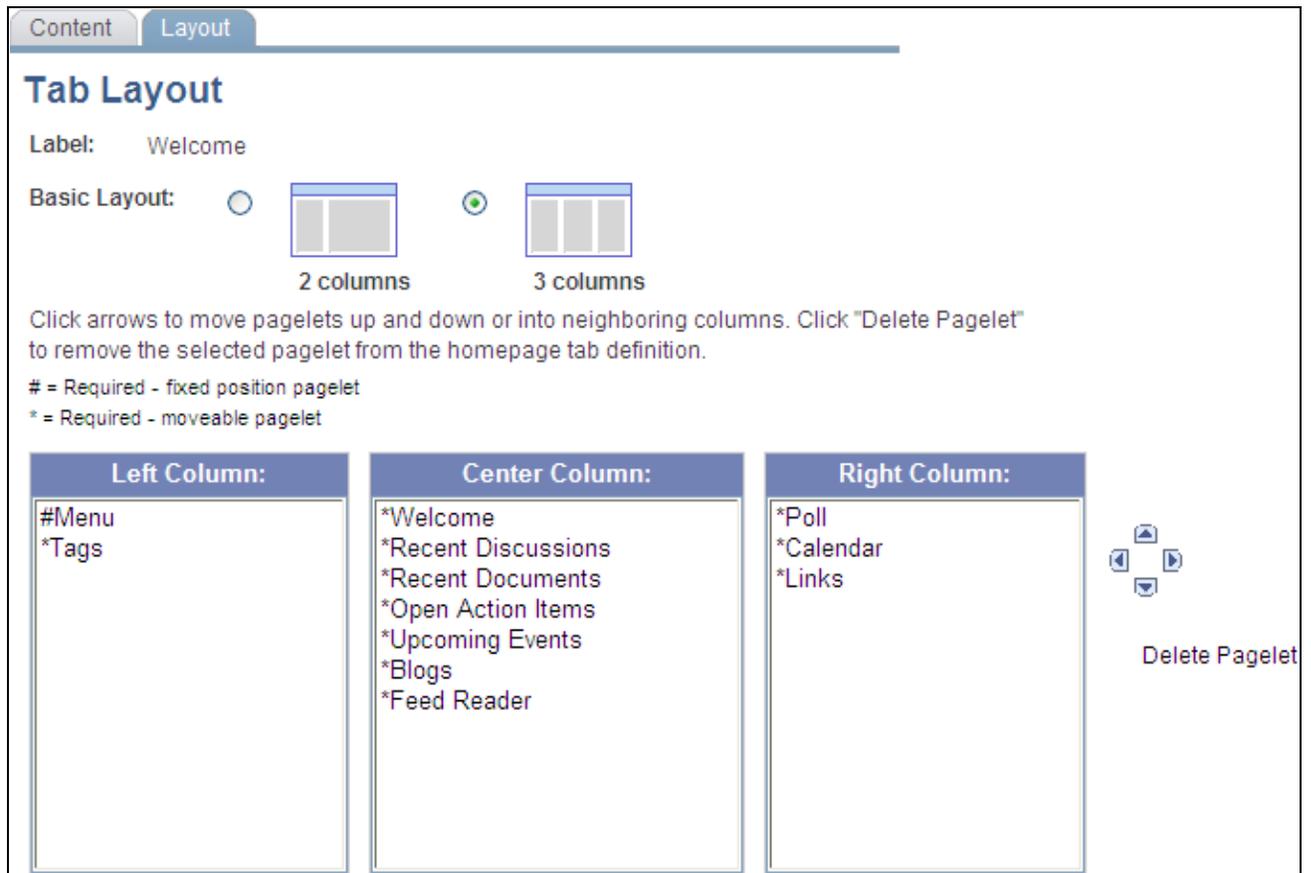
Modifying the Layout of the Workspace Homepage

Use either of these two methods to modify the layout of the workspace homepage:

- Move pagelets on the Tab Layout page.
- Drag and drop pagelets on the workspace homepage.

Moving Pagelets on the Tab Layout Page

Access the Tab Layout page (click the Layout link on the workspace homepage).



Tab Layout page

Use the Tab Layout page to designate the layout of content on the workspace homepage.

Label	Displays the name of this tab.
Basic Layout	Select to display the pagelets in either two or three columns on the workspace homepage. To specify the three-column layout, be sure that at least one pagelet does not have the Req-Fix behavior option selected on the Tab Content page.
Left Column, Center Column, and Right Column	Displays the pagelets selected on the Tab Content page under the assigned column headings. If the basic layout is two columns, the pagelets are divided into left and right columns. If the basic layout is three columns, the pagelets are divided into left, center, and right columns.

Note. A pound sign (#) indicates a pagelet with the Req-Fix behavior option selected on the Tab Content page. An asterisk (*) indicates a pagelet with the Required behavior option selected on the Tab Content page.

For example, #Menu indicates that the workspace menu pagelet cannot be moved to a different location on the homepage.



Use the Move Left, Move Up, Move Right, and Move Down buttons to position a pagelet.

Select a pagelet, and then click the directional arrow buttons to move the selected pagelet up in the list, down in the list, to the next column to the right, or to the next column to the left.

Delete Pagelet

Select a pagelet and then click Delete Pagelet to delete the pagelet from the workspace homepage.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology*, "Administering Portal Homepages and Pagelets," Managing Tabbed Homepages, Arranging the Tab Layout.

Dragging and Dropping Pagelets on the Workspace Homepage

You can also rearrange pagelets on the workspace homepage by dragging and dropping them between columns.

To drag a pagelet, hover over the pagelet title bar; the cursor changes shape to indicate that you can drag the pagelet. Click and drag the pagelet. When you are in the new location—signified by the color change—release the mouse.

Note. You cannot move pagelets that you have configured as required-fixed.

See *Enterprise PeopleTools 8.50 PeopleBook: Using PeopleSoft Applications*, "Setting User Preferences," Personalizing Your Homepage, Personalizing Layout.

Managing the Status of Workspaces

This section discusses how to manage workspaces, including how to inactivate and delete workspaces.

Understanding Workspace Statuses

The Manage Workspaces component enables you to delete workspaces altogether. It also enables you to inactivate a workspace, which just makes it unavailable for viewing and use by members, but keeps the data stored in your database. The component also enables you to reactivate inactive workspaces should you need to resume use of them.

Pages Used to Manage the Status of Workspaces

Page Name	Definition Name	Navigation	Usage
Manage Workspaces	EPPCW_MANAGE	Portal Administration, Workspaces, Manage Workspaces	Perform managerial tasks on your workspaces, such as inactivating, activating, and deleting them.

Page Name	Definition Name	Navigation	Usage
Delete Confirmation	EPPCW_DEL_CONFIRM	Click the Delete button on the Manage Workspaces page.	Confirm your selected deletion.

Changing the Status of a Workspace

Access the Manage Workspaces page (Portal Administration, Workspaces, Manage Workspaces).

Manage Workspaces
 Activate, deactivate or delete existing collaborative workspaces.

Filter Workspaces

Category:

Owner:

Status: Active Inactive

Keyword:

Workspaces Customize | Find | View All | First 1 of 1 Last

Select	Workspace	Category	Owner	Status
<input type="checkbox"/>	Demo Workspace		Vice President of Finance	Active

Select All [Clear All](#)

Cascade to all children.

Manage Workspaces page

Filter Workspaces

- Category** Select the category in which you want to search for the workspace that you want to manage.
- Owner** Select the owner of the workspace that you want to manage.
- Status** Select the status of the workspace you want to manage.
Active.
Inactive.
- Keyword** Enter any keywords that you want to use to narrow your search results. The keywords you enter will be matched against any text that appears in the title (label) or description of a workspace.

Search	Click to perform your requested search.
Reset	Click to clear all keywords you have entered.
 Workspaces	
Select	Select to indicate that you want to perform a managerial action on the workspace.
Workspace	Displays the name of the workspace. Click the link to access the workspace.
Category	The system displays the category the workspace is assigned to.
Owner	The system displays the name of the workspace owner.
Status	The system displays if the workspace is active or inactive.
Activate	Click to reactivate the selected workspace.
Deactivate	Click to deactivate the selected workspace. The workspace is no longer accessible or usable by its members, but its data continues to be stored in your database.
Delete	Click to delete the selected workspace . You are prompted to confirm your deletion.

Moving a Workspace in the Workspace Hierarchy

You can move a workspace in the workspace hierarchy by specifying a new parent workspace on the Administration - Properties page.

See [Chapter 4, "Administering Collaborative Workspaces," Administering Workspace Properties, page 67.](#)

Importing and Exporting Workspace Data

See the release notes on My Oracle Support for information about importing and exporting workspace data.

See My Oracle Support, Knowledge, Portal Solutions, Enterprise Portal.

Managing External User Accounts for Workspaces

Access the Manage External User Accounts page (Portal Administration, Workspaces, Manage External Users).

Manage External Users

Removing the external status from a user removes any indication that this user was originally given an account specifically for participation in a workspace.

▼ Filter External Users

Last Signon Before: 

Keyword:

Users				
Select	Users	Description	Workspace(s)	Last Signon
<input type="checkbox"/>	SALES	Sales Manager	Demo Workspace	

Select All

Manage External Users page

You can search for external users based on the last signon date or by a keyword, such as user name.

The Users group box displays the user name, the description of the user, what workspaces they have access to, and when they last signed on to that workspace.

To delete the external user from the system, select the name and click Delete.

To remove a user's external status and give them status as an internal user, select the name and click Remove External Status.

Chapter 5

Working in Collaborative Workspaces

This chapter discusses how to:

- Access workspaces.
- Navigate in a workspace.
- Modify your workspace homepage.
- Use the Wiki Content module.
- Use the Discussions module.
- Use the Documents module.
- Use the Blogs module.
- Use the Links module.
- Use the Action Item Lists module.
- Use the Calendar module.
- Use the Members module.
- Use the Related Data module.
- Use the Polls module.
- Use the Browse Workspaces module.
- Search within workspaces.
- Subscribe to workspace feeds.
- Create and use tags in workspaces.
- Work with additional workspace pagelets.

Accessing Workspaces

This section discusses how to:

- Work with the My Workspaces pagelet.
- Search for workspaces.

- Browse the workspace hierarchy.
- Browse for workspaces by category.
- Request access to a workspace.

Understanding How to Access Workspaces

Oracle's PeopleSoft Enterprise Portal provides several tools to facilitate access to workspaces:

- My Workspaces pagelet

Use the My Workspaces pagelet to access the workspaces to which you already belong.

- Workspaces - Search page

Use the Workspaces - Search page to specify criteria to search for workspaces. The search results show workspaces to which you already belong.

- Workspaces - Hierarchy page

Use the Workspaces - Hierarchy page to traverse the entire hierarchy of all workspaces, including workspaces to which you do not belong. From this page, you can select a workspace and then navigate to that workspace or create a child workspace if you have workspace creation privileges. In addition, from this page, you can request membership to a workspace to which you do not belong.

- Browse By Category page

Use the Browse By Category page to browse by category through workspaces. The workspaces displayed are those to which you already belong.

In addition, if you are not a member of a specific workspace, you will be presented with an opportunity to request membership when you attempt to access that workspace.

The Workspaces - Search page, Workspaces - Hierarchy page, and Browse By Category page are available from the portal homepage and in the Browse Workspaces module of each workspace.

Pages Used to Access Workspaces

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Personalize My Workspaces	PTPPB_USER_PREF	Click the Customize button on the My Workspaces pagelet.	Specify the number of workspaces to display in the pagelet.

Page Name	Definition Name	Navigation	Usage
Workspaces - Search	EPPCW_MYWS	<ul style="list-style-type: none"> • Browse Workspaces • Click the Browse Workspaces link in the workspace menu. • Click the View All Workspaces link in the My Workspaces pagelet. • Click the View All Workspaces link in the Related Workspaces pagelet. 	Specify criteria to search for workspaces of which you are already a member.
Workspaces - Hierarchy	EPPCW_HIER_SPACES	Select the Hierarchy page from the Workspaces - Search page.	Traverse the entire workspace hierarchy including workspaces of which you are not a member.
Browse By Category	EPPCW_BROWSE	Click the Browse By Category button on the Workspaces - Search page.	Browse by category through workspaces of which you are already a member.
Workspace Invitation	EPPCW_MBR_REQUEST	Select a workspace on the Workspaces - Hierarchy page.	Send a membership request to the workspace administrator.
Workspace Security Error	EPPCW_SECURITY_ERR	Access workspace content or a workspace URL to which you do not have access permission.	Send a membership request to the workspace administrator.
Select Category	EPPCW_CATG_SELECT	Click the Search Categories button on the Workspaces - Search page.	Select the category to enter as search criteria.

Working With the My Workspaces Pagelet

This section discusses how to:

- Personalize the My Workspaces pagelet.
- Use the My Workspaces pagelet.

Personalizing the My Workspaces Pagelet

Access the Personalize My Workspaces page (click the Customize button on the My Workspaces pagelet).

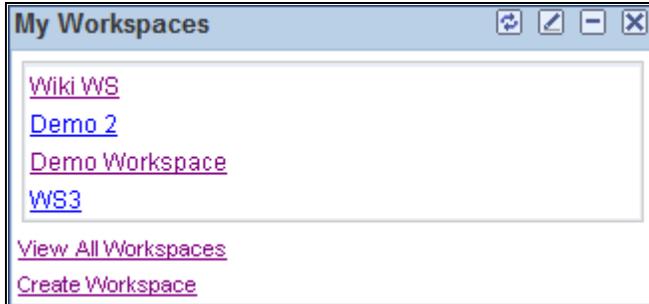
Personalize My Workspaces page

Use the Personalize My Workspaces page to specify the number of workspaces to display in the My Workspaces pagelet.

- | | |
|--------------------------|---|
| Max Rows | Specify the maximum number of workspaces to display in the My Workspaces pagelet. |
| Reset to Defaults | Click to reset the Max Rows field to the delivered default value of 20. |

Using the My Workspaces Pagelet

Access the My Workspaces pagelet on the portal homepage.



My Workspaces pagelet

Use the My Workspaces pagelet to access to the workspaces to which you belong. The My Workspaces pagelet also provides access to several workspace-related tasks.

- | | |
|-------------------------------|--|
| <workspace name> | Click to access the workspace's homepage. |
| View All Workspaces | Click to access the Search - Workspaces page, where you can perform a search for workspaces.

See Chapter 5, "Working in Collaborative Workspaces," Searching for Workspaces, page 95. |

Create Workspace

If you have been given workspace creation privileges, click to access the Select A Workspace Template page, where you can begin creating a workspace.

See [Chapter 3, "Creating Collaborative Workspaces," Creating Root-Level Workspaces, page 42.](#)

Searching for Workspaces

Access the Workspaces - Search page (Browse Workspaces).

The screenshot shows the 'Workspaces' search interface. At the top, there are tabs for 'Search' and 'Hierarchy'. Below the title 'Workspaces', there is a section titled 'Search For Workspaces' containing four input fields: 'Workspace Name' (with the letter 'd' entered), 'Category', 'Owner', and 'Template'. Each of the last three fields has a magnifying glass icon to its right. Below these fields are a 'Search' button and a 'Basic Search' link. Underneath is a 'Search Results' section with a table. The table has three columns: 'Name', 'Description', and 'Category'. It lists two results: 'Demo Workspace' with description 'Demonstration workspace for Facilities Department' and 'Demo 2' with description 'A second demo of the Facilities Department'. At the bottom of the interface are two buttons: 'Browse By Category' and 'Create Workspace'.

Name	Description	Category
Demo Workspace	Demonstration workspace for Facilities Department	
Demo 2	A second demo of the Facilities Department.	

Workspaces - Search page (advanced search options)

Use the Workspaces - Search page to specify criteria to search for workspaces. The search results show workspaces to which you already belong.

Workspace Name

Enter a complete or partial name on which to search. The search text is not case sensitive.

For example, searching on the string *ba* would return workspaces named BASE1, Bavarian Motor Works, and Barry's Workspace.

Category

Select the workspace category on which to search.

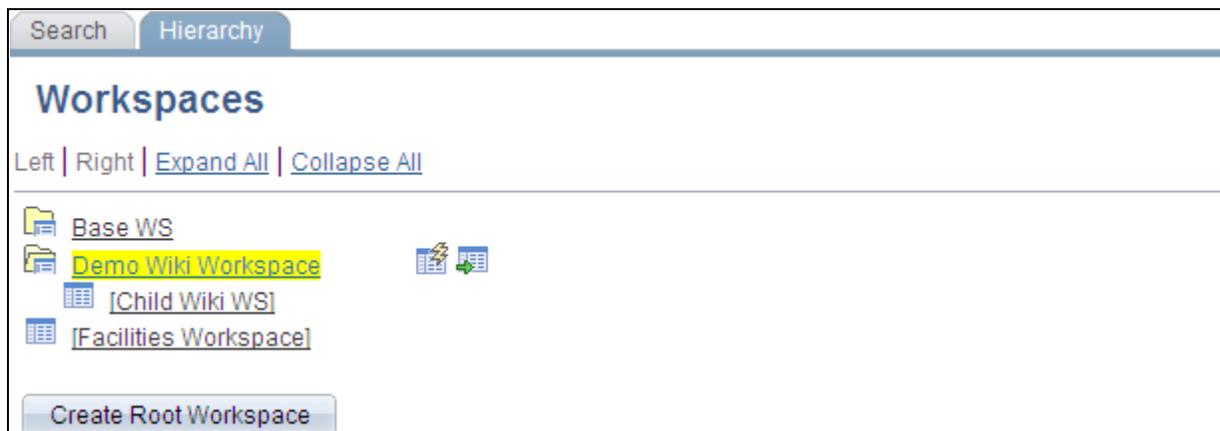
Click the Search Categories button to view the category hierarchy.

See [Chapter 4, "Administering Collaborative Workspaces," Selecting a Workspace Category, page 69.](#)

Owner	Select the owner on which to search. The Owner field is displayed after you click the Advanced Options link.
Template	Select the template on which to search. The Template field is displayed after you click the Advanced Options link.
Search	Click to execute the workspace search based on the criteria entered.
Advanced Search and Basic Search	Click to toggle between the advanced and basic search criteria.
Name	Click a workspace name in the Search Results grid to navigate to the workspace's homepage.
Browse By Category	Click to access the Browse By Category page. See Chapter 5, "Working in Collaborative Workspaces," Browsing Workspaces by Category, page 97.
Create Workspace	Click to access the workspace creation wizard, which you can use to create a root-level workspace. See Chapter 3, "Creating Collaborative Workspaces," Creating Root-Level Workspaces, page 42.

Browsing the Workspace Hierarchy

Access the Workspaces - Hierarchy page (select the Hierarchy page from the Workspaces - Search page).



Workspaces - Hierarchy page (with a parent workspace selected)

Use the Workspaces - Hierarchy page to traverse the entire hierarchy of all workspaces, including workspaces to which you do not belong. From this page, you can select a workspace and then navigate to that workspace or create a child workspace if you have workspace creation privileges. In the hierarchy view, a folder represents a parent workspace that has children. In addition, from this page, you can request membership to a workspace to which you do not belong.

Left and Right Click to move the area displayed to the left or right one level.

Expand All and Collapse All Click to toggle between all parent workspaces fully expanded or fully collapsed.

<workspace name>

Click the link for a workspace name to do one of the following:

- Navigate directly to the selected workspace's homepage if you do not have workspace creation privileges.
- Highlight that workspace and reveal the Create Child Workspace and Go to workspace buttons if you do have workspace creation privileges.

The selected workspace is highlighted in yellow.

Note. When viewing the workspace hierarchy through a workspace's Browse Workspaces module, the Go to workspace button is not displayed for that specific workspace.



Indicates a workspace that does not have any children.



Click the Expand Folder button to expand that parent workspace to reveal its children.



Click the Collapse Folder button to collapse that parent workspace and hide its children.



Click the Create Child Workspace button to create a child workspace with the highlighted workspace as its parent.

See [Chapter 3, "Creating Collaborative Workspaces," Creating Child Workspaces, page 51.](#)



Click the Go to *workspace name* button to navigate to the highlighted workspace's homepage.

Browsing Workspaces by Category

Access the Browse By Category page (click the Browse By Category button on the Workspaces - Search page).

Browse By Category

Browse through the available collaborative workspaces organized by category. Select a workspace name to open that workspace.

> [Departments](#)

Workspaces By Category				
	Category / Workspace	Type	Created By	Created
	HR (0)	Category		
	Finance (5)	Category		
	Customer Service (0)	Category		
	Sales (0)	Category		
	Marketing (0)	Category		
	Demo 2	Workspace	Vice President of Finance	02/02/2009

[Return to Search](#)

Browse By Category page

Use the Browse By Category page to browse by category through workspaces. The workspaces displayed are those to which you already belong.

Workspace/Category Click to



Designates a category folder.

Click a category link to access the contents of the category.



Designates a workspace in the category hierarchy.

Click a workspace link to access the workspace.

Requesting Access to a Workspace

This section discusses how to:

- Request membership to a workspace.
- Request membership when you receive a security access error.

Requesting Membership to a Workspace

Access the Workspace Invitation page (select a workspace for which you do not have access on the Workspaces - Hierarchy page).

Workspace Invitation

You do not have access to this collaborative workspace. You may contact a workspace administrator listed below to request access to the workspace.

Send Invitation Vice President of Finance

Email

Subject: Request for membership to workspace WIKIWS3

Message: User ID: PS

Send
Cancel

Workspace Invitation page

Use the Workspace Invitation page to send a membership request to the workspace administrator.

- | | |
|------------------------|--|
| Send Invitation | Select the administrator or administrators to whom you want to send the request. |
| Subject | Enter the subject of the message or accept the default text. |
| Message | Enter the body of the message or accept the default text. |
| Send | Click to send the request and return to the Workspaces - Hierarchy page. |
| Cancel | Click to cancel and return to the Workspaces - Hierarchy page without sending the request. |

Requesting Membership When You Receive a Workspace Security Error

Access the Workspace Security Error page (access workspace content or a workspace URL to which you do not have access permission.)

Workspace Security Error

You do not have access to this collaborative workspace. You may contact a workspace administrator listed below to request access to the workspace.

Unger, Annette

Vice President of Finance

Email

Subject: Request for membership to workspace SIBLING3

Message: User ID: PS

Send

Workspace Security Error page

Use the Workspace Security Error page to send a membership request to the workspace administrator.

unlabeled	Select the administrator or administrators to whom you want to send the request.
Subject	Enter the subject of the message or accept the default text.
Message	Enter the body of the message or accept the default text.
Send	Click to send the request.
Return to Home	Click to return to portal homepage.

Navigating in a Workspace

When you access a workspace, the workspace homepage displays. The workspace homepage is the front page and standard entry area for a workspace.

The workspace administrator can configure the workspace homepage to display pagelets relevant to the content of the workspace, including pagelets associated with each workspace module. The workspace homepage displays the modules selected for the workspace in the menu on the left and pagelets selected for the workspace homepage in selected columns as shown in the following example of a three-column homepage:

The screenshot displays the Oracle Workspace interface for a 'Demo Workspace'. The header includes the Oracle logo, 'Workspace | Demo Workspace', and a user-specific welcome message. The main content area is organized into several sections: a 'Welcome' message, 'Recent Discussions' (a table with columns for Date, Recent Posts, and Author), 'Recent Documents' (a table with columns for Date, Title, and Author), and 'Open Action Items' (a table with columns for Due Date, Action Item, and Assigned To). The left sidebar contains a 'Menu' with various workspace options and a 'Tags' section. The right sidebar features a 'Poll' section, a 'Calendar' for September 2009, and a 'Links' section.

Workspace homepage

The name of the workspace appears in the workspace header and also at the top of the workspace menu. This name was defined when the workspace was created, but can be edited in the Administration module. Any contextual relationship that was defined for the workspace appears as a link at the bottom of the menu. If applicable, select the Return to link to access the transaction for which the workspace was created.

The following elements appear in the workspace header:

- Portal Home** Click to exit the workspace and access the PeopleSoft Enterprise Portal homepage.
- Sign out** Click to sign out of the PeopleSoft system.
- <Workspace Name>** Click to access the workspace homepage.



Hover over any of these to view the list of feeds published as workspace feeds. Click any list item to open that feed document.

Click the Feed button or Feed link to open the first feed document in the list.

Click the Open menu button to toggle the list of feeds between frozen open and closed.

Search

Click and enter a search phrase in the Search field.



Click to perform a search within the workspace.

Alternatively, press Enter after entering a search phrase in the Search field.

See [Chapter 5, "Working in Collaborative Workspaces," Searching Within Workspaces, page 143.](#)

Content

Click to access the Tab Content page. This link only displays for users who have been designated as workspace owners or administrators.

See [Chapter 4, "Administering Collaborative Workspaces," Modifying the Content of the Workspace Homepage, page 83.](#)

Layout

Click to access the Tab Layout page. This link only displays for users who have been designated as workspace owners or administrators.

See [Chapter 4, "Administering Collaborative Workspaces," Modifying the Layout of the Workspace Homepage, page 85.](#)

The following links can appear in the workspace menu and are dependent on the modules selected by the workspace administrator:

Note. The Administration link displays only for members designated as an administrator for this workspace.

Welcome

Click to access the workspace homepage. This link typically does not display for workspaces configured with the Wiki Content module.

Wiki Content

Click to access the Wiki Content module.

Note. The Wiki Content link in the workspace menu is not shown in the preceding example.

Use the Wiki Content module to collaboratively author wiki content for the workspace. The Wiki Content module provides features such as version control and multi-language support that allow continuous and collaborative refinement of the content. The rich text editor is used to edit the wiki content, which also displays in the Wiki Content pagelet.

See [Chapter 5, "Working in Collaborative Workspaces," Using the Wiki Content Module, page 105.](#)

Discussions

Click to access the Discussions module.

Use the Discussions module to participate in discussions relevant to the collaborative workspace. The Discussions module enables workspace members to post discussion topics and replies, and provides the complete history of interaction on a topic. Members can also monitor recent discussion postings using the Recent Discussions pagelet that displays on the workspace homepage.

See [Chapter 5, "Working in Collaborative Workspaces," Using the Discussions Module, page 118.](#)

Documents

Click to access the Documents module.

Use the Documents module to publish, optionally approve, and view shared documents relevant to a workspace. Members can monitor recent document postings using the Recent Documents pagelet that displays on the workspace homepage.

See [Chapter 5, "Working in Collaborative Workspaces," Using the Documents Module, page 120.](#)

Blogs

Click to access the Blogs module.

Use the Blogs module to participate in the blog for the workspace. The Blogs module enables workspace members to create news and multithreaded commentary on topics relevant to the workspace. Members can also monitor recent blog postings using the Blogs pagelet that displays on the workspace homepage.

See [Chapter 5, "Working in Collaborative Workspaces," Using the Blogs Module, page 121.](#)

Links

Click to access the Links module.

Use the Links module to create a collection of links relevant to the workspace. This collection displays in the Links pagelet that displays on the workspace homepage.

See [Chapter 5, "Working in Collaborative Workspaces," Using the Links Module, page 123.](#)

Action Item Lists

Click to access the Action Item Lists module.

Use the Action Item Lists module to maintain action item lists and action items defining responsibilities for individual workspace members. Members can also monitor current action items using the Open Action Items pagelet that displays on the workspace homepage.

See [Chapter 5, "Working in Collaborative Workspaces," Using the Action Item Lists Module, page 132.](#)

Calendar

Click to access the Calendar module.

Use the Calendar module to maintain the workspace calendar and events to coordinate the activities of the workspace team. Members can also monitor current events using the Upcoming Events and Calendar pagelets that display on the workspace homepage. Moreover, the Calendar pagelet can simultaneously display events from multiple calendars available from all portals, sites, and workspaces.

See [Chapter 5, "Working in Collaborative Workspaces," Using the Calendar Module, page 133.](#)

Members

Click to access the Members module.

Use the Members module to get information about and communicate with workspace members. The Members module provides access to member profiles, as well as links to initiate email and instant messaging with members. The Members module is required in all workspaces.

See [Chapter 5, "Working in Collaborative Workspaces," Using the Members Module, page 136.](#)

Related Data

Click to access the Related Data module.

Use the Related Data module to access a collection of pagelets relevant to the workspace. This collection of pagelets is compiled by the workspace administrator.

See [Chapter 5, "Working in Collaborative Workspaces," Using the Related Data Module, page 140.](#)

Polls

Click to access the Polls module.

Use the Polls module to create questions for the workspace poll. Members can respond to the poll and monitor poll results using the Poll pagelet that displays on the workspace homepage.

See [Chapter 5, "Working in Collaborative Workspaces," Using the Polls Module, page 141.](#)

Browse Workspaces

Click to access the Browse Workspaces module.

Use the Browse Workspaces module to browse the workspace hierarchy or search to find other workspaces. You can create new workspaces or child workspaces in this module.

See [Chapter 5, "Working in Collaborative Workspaces," Using the Browse Workspaces Module, page 143.](#)

Administration

Note. The Administration link displays only for members designated as an administrator for this workspace.

Click to access the Administration module for the workspace.

The workspace administrator can use the Administration module to define workspace properties, manage workspace membership and security, select workspace modules, define contextual data relationships, and further customize the workspace. The Administration module is required in all workspaces.

See [Chapter 4, "Administering Collaborative Workspaces," Setting Up a Workspace, page 65.](#)

Return to <Transaction Name>

If the workspace is related to a transaction, click this link to access the transaction page.

Modifying Your Workspace Homepage

Unlike your portal homepage, you have limited capabilities for modifying a workspace homepage. The workspace administrator or owner designates the content and layout of the workspace homepage. As a workspace member, you can only delete pagelets configured as Opt-Dflt (optional-default). Pagelets that can be deleted have a Remove button:



Click to remove a pagelet from the workspace homepage.

Important! Once you have deleted a pagelet, it cannot be re-added easily to your workspace homepage.

Using the Wiki Content Module

This section provides an overview of the Wiki Content module and discusses how to:

- Edit the content.
- View the content.
- Review content information.
- Work with the Wiki Content pagelet.

Understanding the Wiki Content Module

The Wiki Content module provides a platform that workspace members can use to maintain wiki content for the workspace. The Wiki Content module is essentially a wiki page that allows workspace members to collaboratively author and continuously revise content using the built-in rich text editor. Similar to other wiki pages, the Wiki Content module provides revision control. In addition, the rich text editor includes a Link dialog box that allows you to create and maintain links to PeopleSoft content that resides elsewhere in your PeopleSoft Enterprise Portal system.

This wiki content is displayed in the Wiki Content pagelet on the workspace homepage, which provides a more collaboration-rich alternative to the Welcome pagelet.

See [Chapter 4, "Administering Collaborative Workspaces," Administering Workspace Properties, page 67.](#)

This table provides a comparison of features available with the Wiki Content module and the Welcome pagelet:

<i>Feature</i>	<i>Wiki Content</i>	<i>Welcome Pagelet</i>
Rich text editor	X	X
Collaborative authoring	X	

Feature	Wiki Content	Welcome Pagelet
Administrator authored		X
Links to PeopleSoft content	X	
Links to external URLs	X	X
Version history	X	
Version comparison	X	
Email notification	X	

This section also includes an overview of revision control.

Understanding Revision Control

The revision control features of the Wiki Content module allow you to:

- View version history and previous versions.
- Compare any two versions.
- Delete a version.
- Restore a version to be the current version.

See [Chapter 5, "Working in Collaborative Workspaces," Reviewing Content Information, page 115.](#)

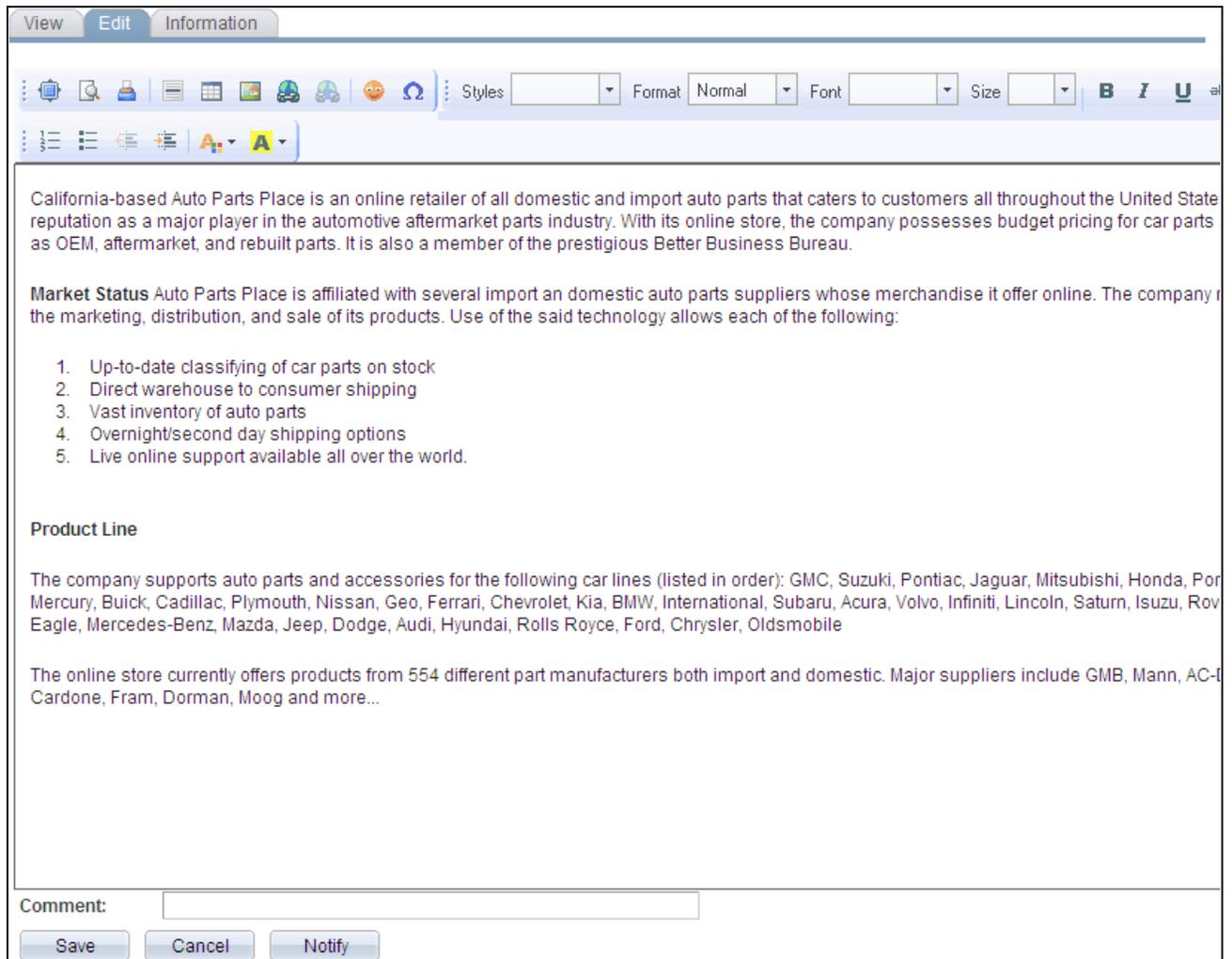
Pages Used with the Wiki Content Module

Page Name	Definition Name	Navigation	Usage
Edit	EPPWI_WIKI_PAGE	<ul style="list-style-type: none"> • In the workspace menu, click the Wiki Content link. • In the Wiki Content pagelet, click the Edit Content link. • In the Wiki Content module, select the Edit page. 	Edit and format the wiki content.
Email Notifications	EPPWI_EVENT_NOTIFY	Click the Notify button on the Edit page.	Send an ad hoc email notification regarding wiki content to selected workspace members.

Page Name	Definition Name	Navigation	Usage
View	EPPWI_VIEW_PAGE	<ul style="list-style-type: none"> • In the Wiki Content module, select the View page. • Click the Save button on the Edit page. • Click the link for a specific version on the Information page. 	Preview the wiki content as it will appear in the Wiki Content pagelet.
Information	EPPWI_PAGE_INFO	In the Wiki Content module, select the Information page.	Review the list of wiki content versions.
Compare Versions	EPPWI_PAGE_DIFF	Select two versions and click the Compare Versions button on the Information page.	Compare the differences between two wiki content versions.

Editing the Content

Access the Edit page (in the workspace menu, click the Wiki Content link).



Edit page (Wiki Content module)

Use the Edit page to edit the wiki content.

rich text editor

The rich text editor provides tools for editing and formatting your wiki content. The Link dialog box is described in more detail in this section.

The basic functions and configuration of the rich text editor are described in detail in the PeopleTools PeopleBooks.

See *Enterprise PeopleTools 8.50 PeopleBook: Using PeopleSoft Applications*, "Working With Pages," Working With Rich Text Editor Fields.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft Application Designer Developers Guide*, "Creating Page Definitions," Setting Page Field Properties for Controls, Setting Options Properties.



Click to the Link button open the Link dialog box.

This dialog box allows you to create links to other content within the PeopleSoft Enterprise Portal system or to external URLs.

See [Chapter 5, "Working in Collaborative Workspaces," Adding Links to Content, page 109.](#)

Save

Click to save the wiki content as a new version.

The View page is displayed after a save.

Cancel

Click to exit the Edit page without saving your changes.

The View page is displayed after cancelling your edits.

Notify

Click to send an ad hoc email notification regarding wiki content to selected workspace members.

See [Chapter 5, "Working in Collaborative Workspaces," Sending Email Notifications, page 112.](#)

Adding Links to Content

Access the Link dialog box (click the Link button in the rich text editor toolbar on the Edit page).

Link

Link Info Target

Link

Alias

Tooltip

Content Type

Topic	Forum	Author	Last Updated
Re: What are the off...	Employee Kiosk	Vice President of Finance	2002-03-15-13.20.46.00
Re: What are the off...	Employee Kiosk	Vice President of Finance	2002-03-15-13.21.24.00
What are the office ...	Employee Kiosk	Vice President of Finance	2002-03-15-13.17.19.00
Do we offer new empl...	Employee Kiosk	Vice President of Finance	2002-03-15-13.20.30.00

1

Link dialog box - Link Info tab

Use the Link Info tab of the Link dialog box to specify the destination and characteristics of links. The Link dialog box allows you to create links to external URLs as well as links to the following PeopleSoft Enterprise Portal content types:

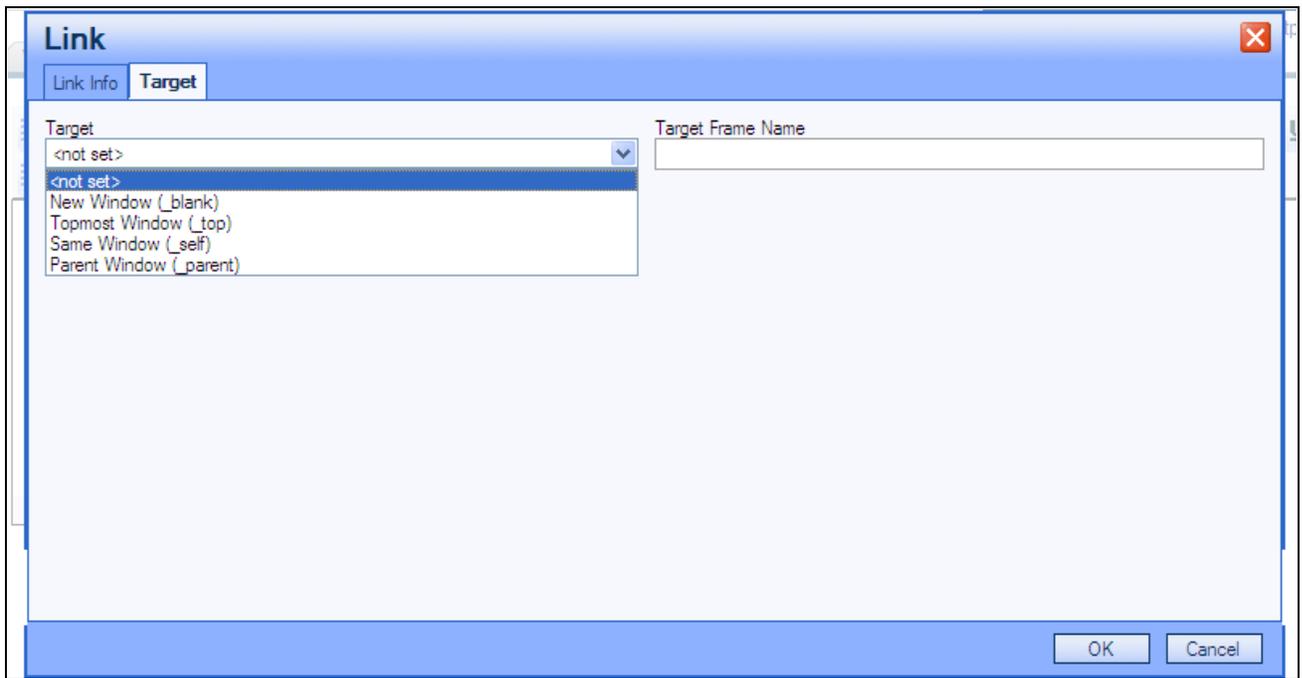
- Attachments — Any content stored within the Documents module of the current workspace.
- Discussions — Any discussion topic from forums within the portal and other workspaces.
- Blogs — Any blog post from blogs within the portal and other workspaces.
- Workspaces — Any active workspace in the PeopleSoft Enterprise Portal system.

Link Enter the complete URL for an external link—for example, <http://www.oracle.com/applications/portals/enterprise/enterprise-portal.html>. Otherwise, this field is automatically populated with the link name when PeopleSoft content has been selected.

Alias Enter the text that will appear in your wiki content as the underlined link. If you selected text prior to clicking the Link dialog box, do not enter any text here; you will overwrite the existing text.

Tooltip	Enter text to appear as a tool tip when the cursor hovers over the link.
Content Type	<p>Select one of the following content types:</p> <ul style="list-style-type: none"> • <i>Attachments</i> — Any content stored within the Documents module of the current workspace. Enter search text to search for specific content. • <i>Discussions</i> — Any discussion topic from forums within the portal and other workspaces. Enter search text to search for specific discussion forums or topics. • <i>Blogs</i> — Any blog post from blogs within the portal and other workspaces. Enter search text to search for specific blogs or posts. • <i>Workspaces</i> — Any active workspace in the PeopleSoft Enterprise Portal system. Enter search text to search for specific workspaces and limit the search by selecting one of the following scopes: <ul style="list-style-type: none"> • <i>All Workspaces</i> • <i>The selected root workspace</i> • <i>The selected workspace category</i> • <i>External URL</i> — Any complete URL.
search text	Enter the search text.
Search	Click to execute the search.
Name, Forum, Blog, and Workspace	Click to select an item as the target of the link.
Topic and Post	Click to select an item as the target of the link.
Author and Creator	Indicates the author for documents, discussion topics, and blog posts, and the workspace creator.
Last Updated	Indicates the last updated date and time for the item.
1, 2, and ...	Click to go to a specific page of search results.

Access the Target tab (select Target in the Link dialog box).



Link dialog box - Target tab

Use the Target tab of the Link dialog box to specify the link behavior.

Target Select one of the following targets:

- *<not set>*
- *New Window (_blank)*
- *Topmost Window (_top)*
- *Same Window (_self)*
- *Parent Window (_parent)*

Target Frame Name When a target is selected, this field is automatically populated with the name of the target frame.

Sending Email Notifications

Access the Email Notifications page (click the Notify button on the Edit page).

Email Notifications

Message not found -- Send an email notification

Group Box

All Workspace Members Workspace Owner Me

Add Selected to Email

Email

Email To:

Cc:

Bcc:

Email Subject: Notification - Workspace: 'WIKIWS4'

Message Text:

Send **Cancel**

Email Notifications page (Wiki Content module)

Use the Email Notifications page to send an ad hoc email message regarding wiki content to selected workspace members.

All Workspace Members, Workspace Owner, and Me

Click to select the workspace members you want to receive the message.

Selecting any of these options and clicking the Add Selected to Email button will populate the Email To field with the email addresses for the corresponding users from their PeopleSoft system profiles.

Add Selected to Email

Click to add email addresses for the selected workspace members to the Email To field.

Additionally, you can manually enter email addresses in the Email To, Cc, and Bcc fields.

Email To

Enter the email addresses for individuals that you want to receive the email message.

Separate addresses by a comma.

Cc	Enter the email addresses for individuals that you want to receive the email message as a carbon copy. Separate addresses by a comma.
Bcc	Enter the email addresses for individuals that you want to receive the email message as a blind carbon copy. Separate addresses by a comma.
Email Subject	Enter the text for the subject of the email message.
Message Text	Enter the text of the message in this text box. The text appears in the email message along with a URL to the Wiki Content module.
Send	Click to send the email notification.
Cancel	Click to cancel sending the email notification.

Viewing the Content

Access the View page (select View in the Wiki Content module).

View Edit Information

Last edited by VP1 on Aug 17, 2009 01:42:47 AM

California-based Auto Parts Place is an online retailer of all domestic and import auto parts that caters to customers all throughout the United States. as a major player in the automotive aftermarket parts industry. With its online store, the company possesses budget pricing for car parts and access to aftermarket, and rebuilt parts. It is also a member of the prestigious Better Business Bureau.

Market Status Auto Parts Place is affiliated with several import and domestic auto parts suppliers whose merchandise it offers online. The company relies on marketing, distribution, and sale of its products. Use of the said technology allows each of the following:

1. Up-to-date classifying of car parts on stock
2. Direct warehouse to consumer shipping
3. Vast inventory of auto parts
4. Overnight/second day shipping options
5. Live online support available all over the world.

Product Line

The company supports auto parts and accessories for the following car lines (listed in order): GMC, Suzuki, Pontiac, Jaguar, Mitsubishi, Honda, Porsche, Buick, Cadillac, Plymouth, Nissan, Geo, Ferrari, Chevrolet, Kia, BMW, International, Subaru, Acura, Volvo, Infiniti, Lincoln, Saturn, Isuzu, Rover, Toyota, Infiniti, Benz, Mazda, Jeep, Dodge, Audi, Hyundai, Rolls Royce, Ford, Chrysler, Oldsmobile

The online store currently offers products from 554 different part manufacturers both import and domestic. Major suppliers include GMB, Mann, AC-Delco, Cardone, Fram, Dorman, Moog and more...

View page (Wiki Content module)

Use the View page to preview the wiki content as it will appear in the Wiki Content module.

Reviewing Content Information

This section discusses how to:

- Review version information.
- Delete a version.
- Restore a version to be the current version.
- Compare versions.

Reviewing Version Information

Access the Information page (select Information in the Wiki Content module).

View Edit **Information**

Wiki Page Name: WIKIWS4
 Created Datetime: 02/16/2009 11:58AM
 Created By: [VP1](#)

Recent Changes Customize | Find | View All | | | First

Version	Compare Versions	Date Last Modified	Updated By User	Comment	Delete Version	Resto
12	<input type="checkbox"/>	Feb 17, 2009 08:08:23 AM	VP1		<input type="button" value="Delete"/>	Resto
11	<input type="checkbox"/>	Feb 16, 2009 03:57:08 PM	VP1		<input type="button" value="Delete"/>	Resto
10	<input type="checkbox"/>	Feb 16, 2009 03:55:46 PM	VP1		<input type="button" value="Delete"/>	Resto
9	<input type="checkbox"/>	Feb 16, 2009 02:24:54 PM	VP1		<input type="button" value="Delete"/>	Resto
8	<input type="checkbox"/>	Feb 16, 2009 02:21:28 PM	VP1		<input type="button" value="Delete"/>	Resto

Information page (Wiki Content module)

Use the Information page to review wiki content versions. On this page, you can compare versions, view a specific version, delete a version, and restore a version as the current version.

Wiki Page Name	Displays the name of the wiki page, which is equivalent to the name of the workspace as stored in the portal definition table.
Created Datetime	Displays the date and time that the wiki page was created, which is equivalent to the date and time that the workspace was created.
Created By	Displays a link to the profile of the user who created the wiki page, which is the ID of the user who created the workspace.
Version	Displays the version number.

Compare Versions	Select two and only two versions for comparison. Then, click the Compare Versions button.
Date Last Modified	Click a link in this column to display that version on the View page.
Updated By User	Displays the user ID of the person who created the version.
Comment	Displays the comment for the version.
Delete	Click to delete a version. See Chapter 5, "Working in Collaborative Workspaces," Deleting a Version, page 116.
Restore Version	Click a link in this column to restore that version to be the current version. <hr/> Important! There is no confirmation of your choice to restore a version. <hr/> See Chapter 5, "Working in Collaborative Workspaces," Restore a Version to Be the Current Version, page 116.
Compare Versions	Select two and only two versions then click this button to compare the versions. See Chapter 5, "Working in Collaborative Workspaces," Comparing Versions, page 116.

Deleting a Version

Click the Delete button on the Information page to delete a specific version.

Restore a Version to Be the Current Version

Click the Restore Version link on the Information page to restore a version to be the current version.

Important! There is no confirmation of your choice to restore a version.

Comparing Versions

Access the Compare Versions page (select two versions and click Compare Versions on the Information page).

View Edit Information **Compare Versions**

California-based Auto Parts Place is an online retailer of all domestic and import auto parts that caters to customers a States. It has maintained its reputation as a major player in the automotive aftermarket parts industry. With its online st possesses budget pricing for car parts and accessories, ~~and~~ as well as OEM, aftermarket, and rebuilt parts. It is also a Better Business Bureau.

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Market Status Auto Parts Place is affiliated with several import and domestic auto parts suppliers whose merchandise company relies on the World Wide Web in the marketing, distribution, and sale of its products. Use of the said technol following:

- Up-to-date classifying of car parts on stock
- Direct warehouse to consumer shipping
- Vast inventory of auto parts
- Overnight/second day shipping options
- Live online support available all over the world.

Product Line

The company supports auto parts and accessories for the following car lines (listed in order): GMC, Suzuki, Pontiac, J Porsche, Lexus, Land Rover, Mercury, Buick, Cadillac, Plymouth, Nissan, Geo, Ferrari, Chevrolet, Kia, BMW, Internati Volvo, Infiniti, Lincoln, Saturn, Isuzu, Rover, Toyota, Renault, Saab, Eagle, Mercedes-Benz, Mazda, Jeep, Dodge, Aud Ford, Chrysler, Oldsmobile

The online store currently offers products from 554 different part manufacturers both import and domestic. Major suppl AC-Delco, Bilstein, Wagner, Delphi, Cardone, Fram, Dorman, Moog and more...

Compare Versions page (Wiki Content module)

Use the Compare Versions page to compare the differences between two versions of the wiki content. Text that appeared in the older version but not in the newer version appears stricken through and highlighted in red. Text that appears in the newer version but not in the older version appears underlined and highlighted in green.

Working With the Wiki Content Pagelet

Access the Wiki Content pagelet on the workspace homepage.

Wiki Content

California-based Auto Parts Place is an online retailer of all domestic and import auto parts that caters to customers all throughout the United States. It has maintained its reputation as a major player in the automotive aftermarket parts industry. With its online store, the company possesses budget pricing for car parts and accessories, and as well as OEM, aftermarket, and rebuilt parts. It is also a member of the prestigious Better Business Bureau.

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The company supports auto parts and accessories for the following car lines (listed in order): GMC, Suzuki, Pontiac, Jaguar, Mitsubishi, Honda, Porsche, Lexus, Land Rover, Mercury, Buick, Cadillac, Plymouth, Nissan, Geo, Ferrari, Chevrolet, Kia, BMW, International, Subaru, Acura, Volvo, Infiniti, Lincoln, Saturn, Isuzu, Rover, Toyota, Renault, Saab, Eagle, Mercedes-Benz, Mazda, Jeep, Dodge, Audi, Hyundai, Rolls Royce, Ford, Chrysler, Oldsmobile

The online store currently offers products from 554 different part manufacturers both import and domestic. Major suppliers include GMB, Mann, AC-Delco, Bilstein, Wagner, Delphi, Cardone, Fram, Dorman, Moog and more...

[Edit Content](#)

Wiki Content pagelet

Use the Wiki Content pagelet to view and edit the wiki content.

Edit Content Click to access the Edit page of the Wiki Content module.

Using the Discussions Module

This section provides an overview of the Discussions module and discusses how to use the Recent Discussions pagelet.

Understanding the Discussions Module

The Discussions module provides a platform that workspace members can use to discuss topics of interest. The discussion can be configured as moderated or unmoderated, and members can post discussion topics and replies. In addition, members can monitor current topics using the Recent Discussions pagelet on the workspace homepage. Discussion updates posted mostly recently to the Discussions module are displayed for member access on the Recent Discussions pagelet, which appears by default on the workspace homepage.

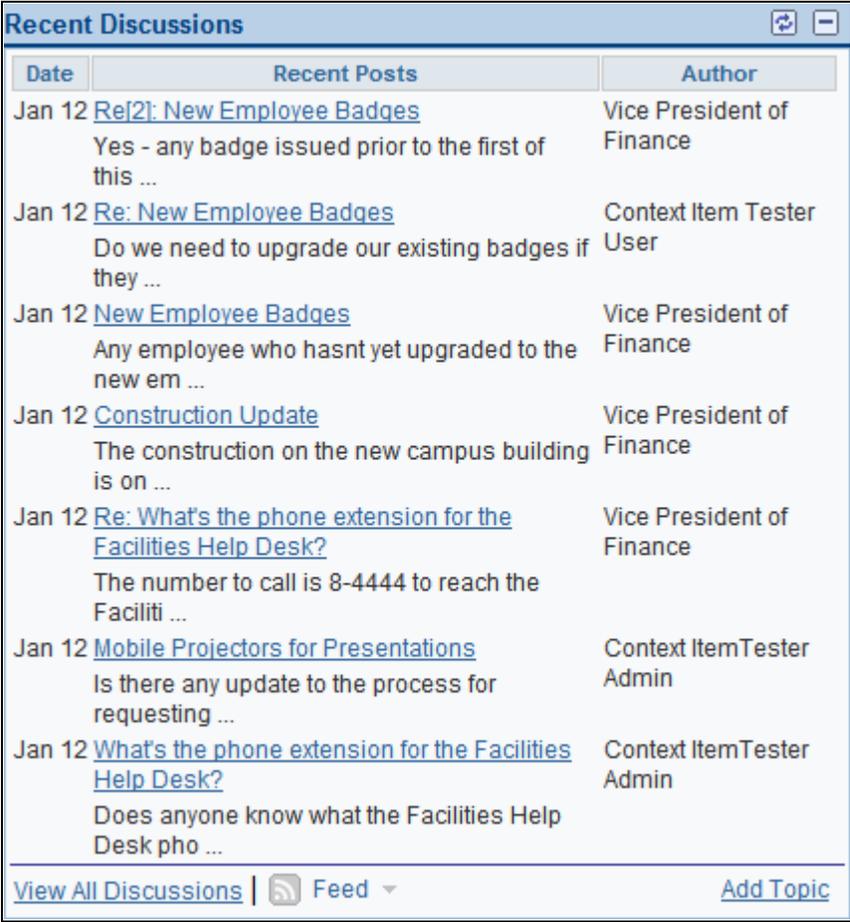
The pages used to participate in discussions in the Discussions module are the same pages used for the Discussion Forums feature available from the PeopleSoft Enterprise Portal homepage. When you click the Discussions link in the workspace menu, you are taken to the Discussion Forum page, which functions in the same way the Discussion Forum page functions in the portal. The Discussion Forum feature is documented in the *PeopleSoft Enterprise Portal 9.1 PeopleBook: Using Portal Features*.

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Using Portal Features*, "Working With Discussion Forums."

In addition, if a workspace is linked to a transaction or transaction instance that has been configured to use the Discussions related content service, a Related Discussions pagelet is automatically added to the Related Data module of the workspace. The Related Discussions pagelet displays discussion topics posted to the transaction or transaction instance.

Working With the Recent Discussions Pagelet

Access the Recent Discussions pagelet on the workspace homepage.



Date	Recent Posts	Author
Jan 12	Re[2]: New Employee Badges Yes - any badge issued prior to the first of this ...	Vice President of Finance
Jan 12	Re: New Employee Badges Do we need to upgrade our existing badges if they ...	Context Item Tester User
Jan 12	New Employee Badges Any employee who hasnt yet upgraded to the new em ...	Vice President of Finance
Jan 12	Construction Update The construction on the new campus building is on ...	Vice President of Finance
Jan 12	Re: What's the phone extension for the Facilities Help Desk? The number to call is 8-4444 to reach the Faciliti ...	Vice President of Finance
Jan 12	Mobile Projectors for Presentations Is there any update to the process for requesting ...	Context ItemTester Admin
Jan 12	What's the phone extension for the Facilities Help Desk? Does anyone know what the Facilities Help Desk pho ...	Context ItemTester Admin

[View All Discussions](#) |  [Feed](#) ▾ [Add Topic](#)

Recent Discussions pagelet

Use the Recent Discussions pagelet to review topics and replies recently posted in the Discussions module. The pagelet also includes other convenient links and options for using the Discussions module.

Recent Posts	Click a link in the Recent Posts column to view the Post Details page for that post.
View All Discussions	Click to access the Discussion Forum page of the Discussions module.
	<p>Hover over any of these to view the list of feeds published for the Discussions module of the workspace. Click any list item to open that feed document.</p> <p>Click the Feed button or Feed link to open the first feed document in the list.</p> <p>Click the Open menu button to toggle the list of feeds between frozen open and closed.</p>
Add Topic	Click to access the Create New Topic page in the Discussions module.

Using the Documents Module

This section provides an overview of the Documents module and discusses how to use the Recent Documents pagelet.

Understanding the Documents Module

The Documents module provides a platform that workspace members can use to share documents of interest. In addition, members can monitor recently posted documents using the Recent Documents pagelet on the workspace homepage.

The pages used to manage folders and documents in the Documents module are the same pages used in the content management system available from the PeopleSoft Enterprise Portal homepage. When you click the Documents link in the workspace menu, you are taken to the Documents page, which functions similar to the way the Browse Managed Content pages function in the content management system. The content management system is documented in the *PeopleSoft Enterprise Portal 9.1 PeopleBook: Content Management System*.

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Content Management System*, "Setting Up and Working With Managed Content."

Working With the Recent Documents Pagelet

Access the Recent Documents pagelet from the workspace homepage.

Date	Title	Author	
Feb 06	Shuttle Schedule		Properties
Jan 17	New Headquarters Construction Update		Properties
Jan 16	Facilities Service Desk		Properties
Jan 16	Office Information		Properties
Jan 16	Office Services		Properties
Jan 16	Transportation Info		Properties

[View All Documents](#) |  [Feed](#) ▾ [Add Document](#)

Recent Documents pagelet

Use the Recent Documents pagelet to review content recently posted in the Documents module. The pagelet also includes other convenient links and options for using the Documents module.

Title Click a link in the Title column to view the document.

Properties Click a link in the Properties column to view the Properties page for the document.

View All Documents Click to access the top folder of the Documents module.



Hover over any of these to view the list of feeds published for the Documents module of the workspace. Click any list item to open that feed document.

Click the Feed button or Feed link to open the first feed document in the list.

Click the Open menu button to toggle the list of feeds between frozen open and closed.

Add Document Click to access the Add Document page to add a document to the top folder in the Documents module.

Using the Blogs Module

This section provides an overview of the Blogs module and discusses how to use the Blogs pagelet.

Understanding the Blogs Module

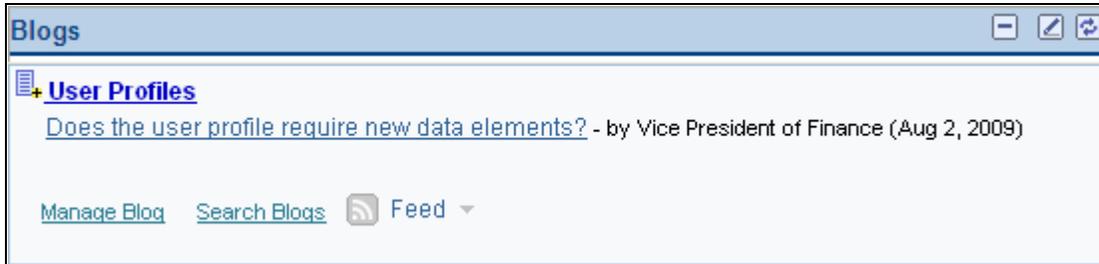
The Blogs module provides a platform that workspace members can use to blog on topics of interest. Members can post blog entries and comments. In addition, members can monitor current entries using the Blogs pagelet on the workspace homepage. The mostly recently added blogs and comments in the Blogs module are displayed for member access on the Blogs pagelet, which appears by default on the workspace homepage.

The pages used to participate in blogging in the Blogs module are the same pages used for the Blogs feature available from the PeopleSoft Enterprise Portal homepage. When you click the Blogs link in the workspace menu, you are taken to the blog page, which functions in the same way the blog page functions in the portal. The Blogs feature is documented in the *PeopleSoft Enterprise Portal 9.1 PeopleBook: Using Portal Features*.

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Using Portal Features*, "Working With Blogs."

Working With the Blogs Pagelet

Access the Blogs pagelet on the workspace homepage.



Blogs pagelet

Use the Blogs pagelet to review blog entries and comments recently posted in the Blogs module. The pagelet also includes other convenient links and options for using the Blogs module.



Click the Add New Post button to access the Create New Post page for the Blogs module.

<Workspace Name>

Click the workspace name to access the Blogs page for the Blogs module.

<Post Title> or
<Comment Title>

Click a link for a blog post or comment to access the View Blog Comments page for that post.

Manage Blog

Click to access the Manage Blog page for the workspace blog.

Search Blogs

Click to access the Search Workspaces page.

See Chapter 5, "Working in Collaborative Workspaces," Searching Within Selected Workspace Modules, page 146.



Hover over any of these to view the list of feeds published for the Blogs module of the workspace. Click any list item to open that feed document.

Click the Feed button or Feed link to open the first feed document in the list.

Click the Open menu button to toggle the list of feeds between frozen open and closed.

Using the Links Module

This section provides an overview of the Links module and discusses how to:

- Maintain links and folders.
- Search for a link.
- Add a folder.
- Access folder contents.
- Work with the Links pagelet.

Understanding the Links Module

Use the Links module to build and maintain a collection of useful links related to a workspace. This collection of links is displayed for member use on the Links pagelet, which appears by default on the workspace homepage.

You can include links to the following types of content:

- External URLs.
- PeopleSoft menu items.

If you define a Link pagelet collection as a part of a workspace template, the collection will display in the Link pagelet in any workspaces built using the template.

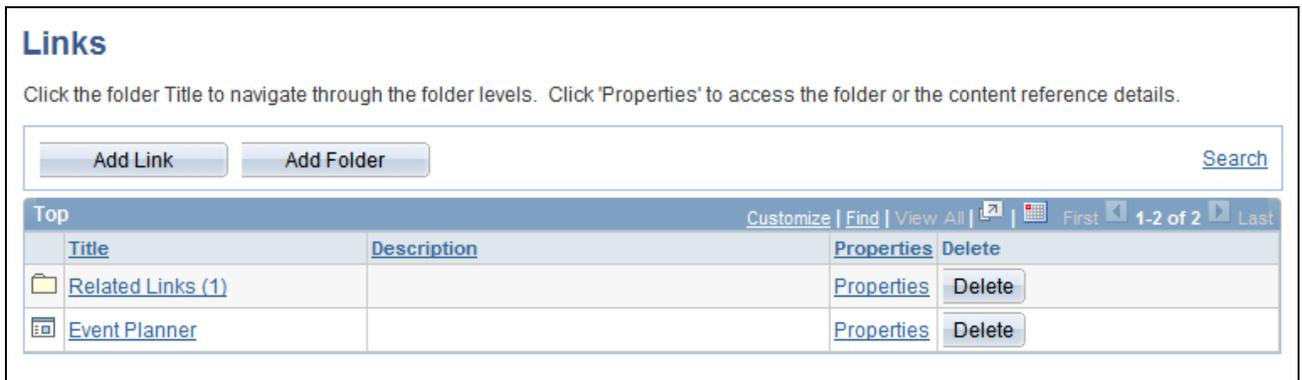
Pages Used in the Links Module

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Links	EPPCW_LKBROWSE	In the workspace menu, click the Links link.	Add, edit, and delete folders and links in the Links module.
Link Properties	EPPCW_LKLINK	<ul style="list-style-type: none"> • Click the Add Link button on the Links page. • Click the Properties link for a link on the Links page. 	Add and maintain links in the Links module.

Page Name	Definition Name	Navigation	Usage
Search Links	EPPCW_ADD_LINK	<ul style="list-style-type: none"> • Select Portal Blog as the link type and click the Click to Search Blogs link. • Select Portal Discussions as the link type and click the Click to Search Discussions link. • Select Workspace as the link type and click the Click to Search Workspace link. 	Search for blog posts, discussion topics, or workspaces to which to link.
Select New Parent Folder	EPPCW_LKNEW_PRNT	Click the Select New Parent Folder link on the Link Properties page.	View a graphical display of the collection of folders and links defined for Links module and select the folder in which you want the selected link to reside.
Folder Properties	EPPCW_LKFOLDER	<ul style="list-style-type: none"> • Click the Add Folder button on the Links page. • Click the Properties link for a folder on the Links page. 	Add and maintain folders in the Links module.
Links	EPPCW_LKCONTENT	Click the link for a folder on the Links page (EPPCW_LKBROWSE).	Add links to a folder. Access the link contents of a folder.

Maintaining Links and Folders

Access the Links page (in a collaboration workspace, click the Links link).



Links page

The Links page displays links created in this workspace including links created automatically by the system.

If the workspace was linked to or created from the Related Links related content service, then a folder with the name of the PeopleSoft application transaction page is created automatically and contains a link back to the transaction from which this workspace was linked or created. Alternatively, if the workspace was created from the Related Workspaces pagelet of Context Manager, then the Related Links folder is created automatically and contains a link back to the transaction from which this workspace was created.

Add Link Click to access the Link Properties page.

Add Folder Click to access the Folder Properties page.

Search Click to access the Search page.

Top

Title Click for a folder to access the Links page (EPPCW_LKCONTENT).
Click for a link to access the content of the link destination.

Properties Click for a folder to access the Folder Properties page.
Click for a link to access the Link Properties page.

Delete Click to delete a folder or link. You will be prompted to confirm the deletion.

Adding a Link

Access the Link Properties page (click the Add Link button on the Links page).

Link Properties

Select the type of content and define its properties and details.

[Top](#) > -- New Link --

*Label:

Long Description:
(254 Characters)

*Link Type: [Click to Search Discussions](#)

Additional Options

Display on Welcome Page

Open Link in New Window

Location

Parent Folder:

Placement in Folder:

Publishing Dates

Valid From:

Valid To:

[Return to Links](#)

Link Properties page

Label

Enter the text you want to appear as the link used to access the link content.

Long Description

Enter a long description of the link content, which will appear in the Description column on the Links page. This description will also appear as rollover text for the link on the Link pagelet.

Link Type	<p>Select the link type:</p> <ul style="list-style-type: none"> • <i>External URL</i> — Select to add a link to an external URL. If selected, the URL field displays. • <i>Menu Item</i> — Select to add a link to a PeopleSoft menu item. This establishes a link to a content reference in the portal registry. If selected, the Portal and Menu Item fields display. • <i>Portal Blog</i> — Select to add a link to a portal blog post. Select the link on the Search Links page. • <i>Portal Discussions</i> — Select to add a link to a discussion forum topic. Select the link on the Search Links page. • <i>Workspace</i> — Select to add a link to a workspace. Select the link on the Search Links page.
URL	This field displays when the Link Type field is set to <i>External URL</i> . Enter the URL address of the website to which you want to create a link.
Portal	This field displays when the Link Type field is set to <i>Menu Item</i> . Select the portal in which the menu item for which you want to provide a link resides.
Menu Item	This field displays when the Link Type field is set to <i>Menu Item</i> . Select the menu item to which you want to provide a link.
Go to the Portal Registry Entry for this CREF	<p>The field displays once link properties have been saved. Click to access the Content Ref Administration page for the menu item.</p> <p>See <i>Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology</i>, "Administering Portals," Administering Content References.</p>
<i>Additional Options</i>	
Use Contextual Data	<p>Select to use contextual data defined in the workspace to derive link content.</p> <p>For example, if you create a workspace that contains contextual data to a specific transaction or URL, a link to the transaction or URL will automatically be added to the Related Links folder on the Links pagelet for the workspace.</p>
Map Key	Click to display the Key Name Mapping page, enabling you to select the keys passed to the link.
Display on Welcome Page	Select to display the link in the Links pagelet on the workspace homepage.
Open Link in New Window	Select to indicate that, when accessed, you want the link content to display in a new window. If this option is not selected, when accessed, the link content is displayed within your workspace frame.

Location

The Location group box displays once link properties have been saved. The fields in this group box enable you to change the location of an existing link.

- Select New Parent Folder** Click to access the Select New Parent Folder page, where you can move the link to a folder other than the current folder.
- Parent Folder** Displays the name of the parent folder of the link.
- Placement in Folder** Select a value in the drop-down list box to change the placement of the link within its parent folder. Available placement values reflect saved link sequencing.

Publishing Dates

- Valid From** Enter a date on which the link will be valid. This is the date on which the link appears on the Links pagelet on the workspace homepage. If you do not enter a value, the link appears when the data is saved.
- Valid To** Enter a date on which the link ceases to be valid. This is the date on which the link no longer appears in the Links pagelet on the workspace homepage. If you do not enter a value, the link does not expire.

Searching for a Link

Access the Search Links page (click a Click to Search link on the Link Properties page).

Search Links

Search *Link Type Portal Blog Search

Search Results			
Post	Blog Name	Creator	Updated Date/Time
1 Welcome to the VP's blog	From the VP	Vice President of Finance	09/11/2009 11:05AM
2 An overview of my responsibilities	From the VP	Vice President of Finance	08/19/2009 8:39AM
3 Re: Welcome to VP's Blog	From the VP	Unger,Annette	08/19/2009 8:45AM

Link Label Return

Search Links page

Use the Search Links page to search for content as the link.

- Search** Enter the search criteria.

Link Type

Select the link type:

- *Portal Blog* — Select to search for portal blog posts.
- *Portal Discussions* — Select to search for discussion forum topics.
- *Workspace* — Select to search for workspaces.

Search

Click to execute the search.

Search Results

Click a link in the search results to select that item as the link destination.

Return

Once a link is selected, click the Return button to return to the Link Properties page.

Mapping Keys for a Link

Access the Key Name Mapping page (select the Map Keys link on the Link Properties page).

Key Name Mapping

Specify and provide optional renames for the keys passed to the link.

Name: Event Planner

Available Workspace Keys			
Select	Description	Key Name in Workspace	Key Name in Link
<input checked="" type="checkbox"/>	Department ID	EO_PE_DEMO_DEPTID	<input type="text" value="EO_PE_DEMO_DEPTID"/>
<input checked="" type="checkbox"/>	Department	EO_PE_DEMO_DEPTLBL	<input type="text" value="EO_PE_DEMO_DEPTLBL"/>

Key Name Mapping page

Select the keys that you want to pass to the link and provide optional new names for these keys.

Selecting a New Parent Folder for a Link

Access the Select New Parent Folder page (click the Select New Parent Folder button on the Link Properties page).



Select New Parent Folder page

Navigate the link folder hierarchy to select a new parent folder.

Adding a Folder

Access the Folder Properties page (click the Add Folder button on the Links page).

Folder Properties page

Label Enter the text you want to appear as the folder name link used to access folder content.

- Long Description** Enter a long description of the folder content, which will appear in the Description column on the Links page and as rollover text for the folder as it appears on the Links pagelet.
- Go to the Portal Registry Entry for this folder** Click to access the Folder Administration page for the folder.
See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology*, "Administering Portals," Administering Folders

Location

- Placement** Select a value in the drop-down list box to change the placement of the folder within the parent folder. Available placement values reflect saved folder sequencing. Placement options are not available for the Related Links folder.

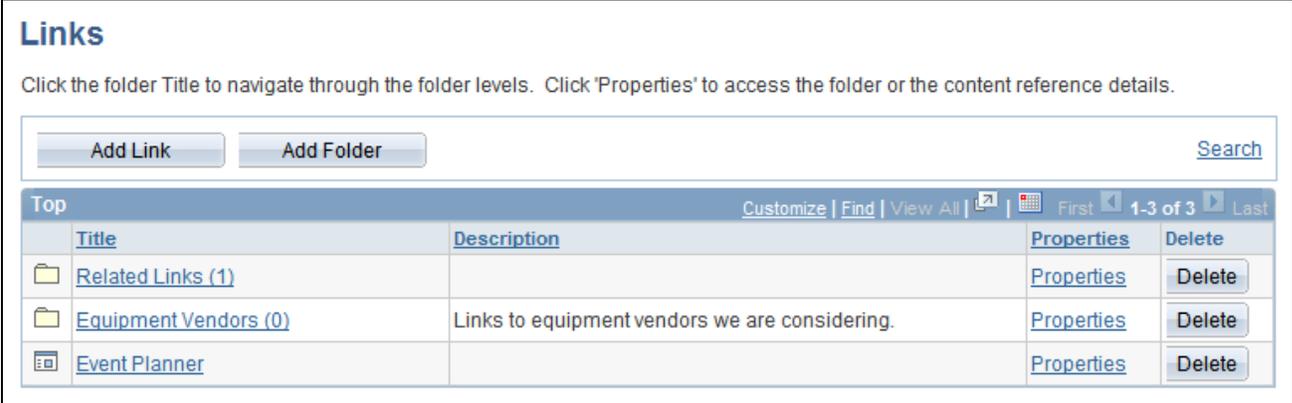
Publishing Dates

- Valid From** Enter the date on which you want the folder to be valid. This is the date on which the folder will appear on the Links pagelet on the workspace homepage. If you do not enter a value, the folder will appear upon saving this page.

- Valid To** Enter the date on which you want the folder to cease being valid. This is the date on which the folder will no longer appear on the Links pagelet on the workspace homepage. If you do not enter a value, the folder will display indefinitely upon saving this page.

Accessing Folder Contents

Access the Links page (click the link for a folder on the Links page).



The screenshot shows the 'Links' page interface. At the top, there is a header 'Links' and a sub-header 'Click the folder Title to navigate through the folder levels. Click 'Properties' to access the folder or the content reference details.' Below this are two buttons: 'Add Link' and 'Add Folder', and a 'Search' link. The main content is a table with columns for 'Title', 'Description', 'Properties', and 'Delete'. The table lists three folders: 'Related Links (1)', 'Equipment Vendors (0)', and 'Event Planner'. The 'Equipment Vendors (0)' folder has a description: 'Links to equipment vendors we are considering.'

Links			
Click the folder Title to navigate through the folder levels. Click 'Properties' to access the folder or the content reference details.			
Add Link		Add Folder	
			Search
Top			
Customize Find View All First 1-3 of 3 Last			
Title	Description	Properties	Delete
Related Links (1)		Properties	Delete
Equipment Vendors (0)	Links to equipment vendors we are considering.	Properties	Delete
Event Planner		Properties	Delete

Links page

The elements on this page are the same as the elements on the Links page, with the exception that this page only allows the addition of and access to links in folders in the Links module.

The Links module allows the addition of one level of folders and does not allow the nesting of folders within folders. Use the Links page to add a first-level folder.

See [Chapter 5, "Working in Collaborative Workspaces," Maintaining Links and Folders, page 124.](#)

Working With the Links Pagelet

Access the Links pagelet from the workspace homepage.



Links pagelet

Use the Links pagelet to access links added to the Links module. The Links pagelet displays links created in this workspace including links created automatically by the system.

If the workspace was linked to or created from the Related Links related content service, then a folder with the name of the PeopleSoft application transaction page is created automatically and contains a link back to the transaction from which this workspace was linked or created.

Links Click a link in the Links column to open the link.

View All Links Click to access the top folder of the Links module.

Using the Action Item Lists Module

This section provides an overview of the Action Item Lists module and discusses how to use the Open Action Items pagelet.

Understanding the Action Item Lists Module

Use the Action Item Lists module to maintain action item lists and action items defining responsibilities for individual workspace members. Members can also monitor current action items using the Open Action Items pagelet that displays on the workspace homepage.

Action items are assignments or tasks that are assigned to workspace members and require some sort of activity, monitoring, or event to take place before they can be considered complete. These action items are organized into groups called "action item lists." Action items appear in the list as a flat view, with no nested hierarchy.

The pages used to manage lists and action items in the Action Item Lists module are the same pages used in the Action Item Lists feature available from the PeopleSoft Enterprise Portal homepage. When you click the Action Item Lists link in the workspace menu, you are taken to the Action Item Lists page, which functions similar to the My Action Item Lists page in the portal. The Action Item Lists feature is documented in the *PeopleSoft Enterprise Portal 9.1 PeopleBook: Using Portal Features*.

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Using Portal Features*, "Working With Action Items."

Working With the Open Action Items Pagelet

Access the Open Action Items pagelet on the workspace homepage.



Due Date	Action Item	Assigned To
Oct 31	Create powerpoint for demo	
Dec 22	Update Office Information	Content Administrator

[View All Action Item Lists](#)

Open Action Items pagelet

Use the Open Action Items pagelet to review open action items in the Action Item Lists module. The pagelet also includes other convenient links for using the Action Item Lists module.

Action Item	Click a link in the Action Item column to view the Action Item Details page for that item.
View All Action Item Lists	Click to access the Action Item Lists page of the Action Item Lists module.

Using the Calendar Module

This section provides an overview of the Calendar module and discusses how to:

- Work with the Calendar pagelet.
- Work with the Upcoming Events pagelet.

Understanding the Calendar Module

Use the Calendar module to maintain the workspace calendar and events to coordinate the activities of the workspace team. Members can also monitor current events using the Upcoming Events and Calendar pagelets that display on the workspace homepage. Moreover, the Calendar pagelet can simultaneously display events from multiple calendars available from all portals, sites, and workspaces.

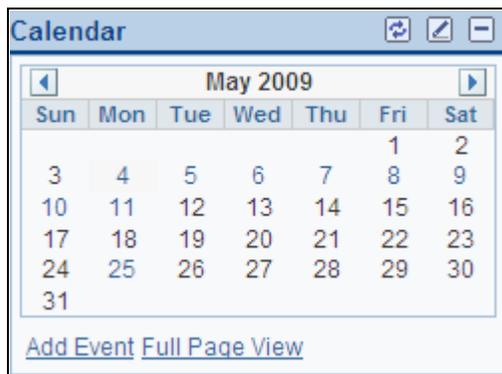
The Calendar module enables workspace members to manage the workspace calendar to coordinate the activities of the workspace team. A workspace calendar provides a way to share, organize, and communicate about events that pertain to the workspace. Workspace members can also view calendar events in the Calendar pagelet and the Upcoming Events pagelet on the workspace homepage or in the full-page view in the Calendar module.

The pages used to manage the workspace calendar and events in the Calendar module are the same pages used in the Community Calendars feature available from the PeopleSoft Enterprise Portal homepage. When you click the Calendar link in the workspace menu, you are taken to the Calendar page, which functions similar to the Calendar page in the portal. The Community Calendars feature is documented in the *PeopleSoft Enterprise Portal 9.1 PeopleBook: Using Portal Features*.

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Using Portal Features*, "Working With Community Calendars."

Working With the Calendar Pagelet

Access the Calendar pagelet on the workspace homepage.



Calendar pagelet

Use the Calendar pagelet to view events from the workspace calendar. The Calendar pagelet can also be configured as a unified calendar to display events for one or more calendars to which you have access.

See [Chapter 5, "Working in Collaborative Workspaces," Personalizing the Calendar Pagelet, page 135](#).



Click the Prev button to view the calendar for the previous period (day, week, or month).



Click the Next button to view the calendar for the next period (day, week, or month).

<Date>

Hover over to determine whether events are scheduled for that date; the date will appear as a tool tip if events are scheduled.

Click to display a pop-up list of events for that date. From the pop-up list, you can:

- Click an event link to access the View Event page for that event.
- Hover over Add Event to select a calendar and access the Event Details to add the event.

Note. If more than one calendar has been personalized to display in the Calendar pagelet, then each of these calendars will display under the Add Event menu.

Add Event

Click to access the Event Details page to add an event to the workspace calendar.

Full Page View

Click to access the monthly view of the Community Calendar page showing data from all calendars in the PeopleSoft Enterprise Portal system.

Personalizing the Calendar Pagelet

Access the Personalize My Calendar Events page (click the Customize button in the Calendar pagelet).

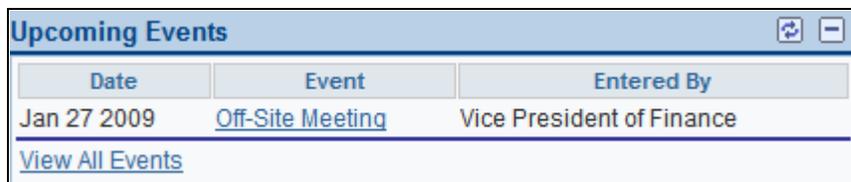
Personalizing calendar pagelets is documented in the *PeopleSoft Enterprise Portal 9.1 PeopleBook: Using Portal Features*.

Note. By default, the workspace calendar is selected for display in the Calendar pagelet.

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Using Portal Features*, "Working With Community Calendars," Page Used to Personalize the My Events Pagelet.

Working With the Upcoming Events Pagelet

Access the Upcoming Events pagelet on the workspace homepage.



Date	Event	Entered By
Jan 27 2009	Off-Site Meeting	Vice President of Finance

[View All Events](#)

Upcoming Events pagelet

Use the Upcoming Events pagelet to review upcoming events from the workspace calendar. The pagelet also includes other convenient links for using the Calendar module.

Event

Click a link in the Event column to display the event view page for that event.

View All Events

Click to access the Calendar page of the Calendar module.

Using the Members Module

This section provides an overview of the Members module and discuss how to:

- View the list of members.
- View member profiles.
- Notify workspace members.

Understanding the Members Module

The Members module enables workspace members to learn more about who the other members participating in the workspace are. Much of this information about members is shared by way of member profiles, which should be made available for all members in a workspace.

There are two types of member profiles that can be displayed for a workspace member. If the PeopleSoft Enterprise Portal Resource Finder feature has not been fully implemented or if it has been fully implemented but does not contain information for a member, the member profile will display data from the member's PeopleTools user profile (primarily from the PSOPRDEFN table).

If Resource Finder has been fully implemented, the Use Resource Finder for Profile Pages option has been selected on the Installation Options page, and there is Resource Finder data available for the member, then the member profile is displayed using the Resource Finder participant profile.

The Members module also serves as a central point from which members can communicate with one another, providing easy access to email and instant messaging functionality. Email and instant messaging functionality is accessible from the member profile.

Pages Used in the Members Module

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Members	EPPCW_MBDIRECTORY	In the workspace menu, click the Members link.	View members of the workspace. Access member profiles, which you can use to communicate with members by way of email and instant messaging.
Member Profile	EPPCW_MBRPROFILE	In the workspace menu, click the Members link. Click the link for the member's name on the Members page.	View details about a member. Access email and instant messaging functionality that can be used to communicate with the member.

Page Name	Definition Name	Navigation	Usage
Notify Members	EPPCW_MBNOTIFY	<ul style="list-style-type: none"> Click the Notify All Members button on the Members page. This button is available if at least one member has email set up. Click the email address for a member on the Members page. 	Send an email message to selected or all members of the workspace.

Viewing the List of Members

Access the Members page (in the workspace menu, click the Members link).

Members			
Notify All Members		Member Administration	Search
Member List Customize Find First 1-22 of 22 Last			
Member Name	Role	Email Address	Privilege Set
Marketing		dpierce303@yahoo.com	Contributor
Content Administrator	PAPP_EMPLOYEE		Viewer
Demo Test / Site Administrator	PAPP_EMPLOYEE		Viewer
Context Item Tester Admin	PAPP_EMPLOYEE		Viewer, Administrator
Context Item Tester Manager	PAPP_EMPLOYEE		Viewer, Moderator
Context Item Tester User	PAPP_EMPLOYEE		Viewer, Contributor
Demo Site Publisher	PAPP_EMPLOYEE		Viewer
Demo Site Viewer	PAPP_EMPLOYEE		Viewer
Presentation Administrator	PAPP_EMPLOYEE		Viewer
Employee	PAPP_EMPLOYEE		Viewer
Content Integration Admin	PAPP_EMPLOYEE		Viewer
Navigation Administrator	PAPP_EMPLOYEE		Viewer
Pagelet Administrator	PAPP_EMPLOYEE		Viewer
Portal Administrator	PAPP_EMPLOYEE		Viewer
Security Administrator	PAPP_EMPLOYEE		Viewer
Site Management Administrator	PAPP_EMPLOYEE		Viewer
Repository Administrator	PAPP_EMPLOYEE		Viewer
PeopleSoft Demo Role User	PAPP_EMPLOYEE		Viewer
Unger, Annette	PAPP_EMPLOYEE		Viewer
Sales Manager		sales@xyz.com	Viewer
Branding test user	PAPP_EMPLOYEE		Viewer
Vice President of Finance	PAPP_EMPLOYEE		Viewer, Owner

Members page

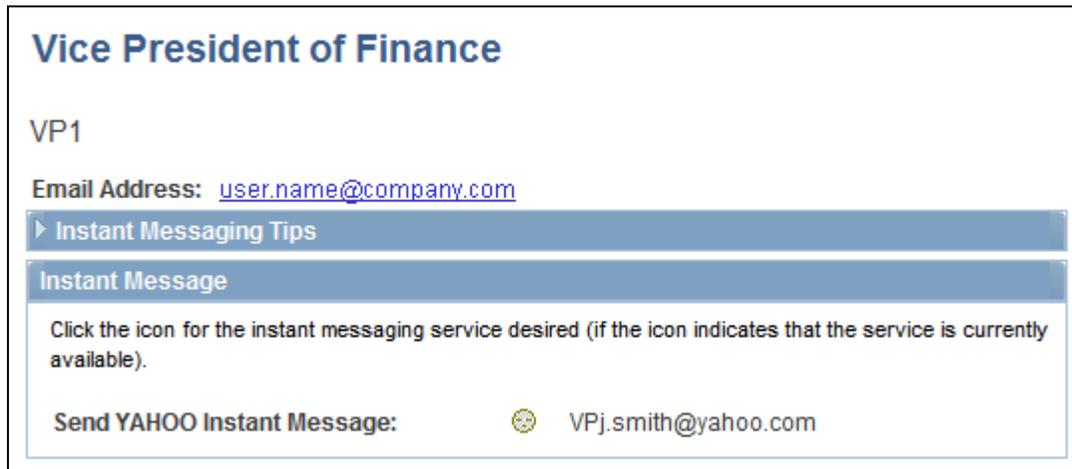
Notify All Members

Click to access the Notify Members page, where you can send an email message to all members. This button is available if at least one member has email set up.

Member Administration	Click to access the Administration - Members page, where you can add and delete workspace members, as well as manage member privileges.
Search	Click to access the Search page, where you can perform a search within the Members module.
Instant Messaging Indicator	If applicable, an instant messaging indicator displays for a member. Click an indicator that indicates the member is online to send an instant message to the member.
Member Name	Click a member name to access the member's profile.
Role	Displays a member's role, if the member is included in a PeopleTools-based role that has been included as a member of the workspace.
Email Address	If applicable, the member's email address displays. Click the link to send an email to the member.
Privilege Set	Displays the privilege set the member has been assigned in the workspace. See Chapter 4, "Administering Collaborative Workspaces," Understanding Workspace Privilege Sets, page 60.

Viewing Member Profiles

Access the Member Profile page (in the workspace menu, click the Members link; click a link for the member's name on the Members page).



Member Profile page

Click Edit My Profile link to display the General Profile Information page where you can update and edit your personal profile settings.

See *Enterprise PeopleTools 8.50 PeopleBook: Using PeopleSoft Applications*, "Setting User Preferences," Setting Up Your System Profile

Click Edit My Instant Messaging Settings to display the My Instant Messaging Information page.

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Portal and Site Administration*, "Setting Up Instant Messaging in PeopleSoft Enterprise Portal."

Member profiles generated using Resource Finder as its source display like Resource Finder participant profiles.

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Resource Finder*, "Using Participant Profiles and Organization Charts."

Notifying Workspace Members

Access the Notify Members page (click the Notify All Members button on the Members page).

Notify Members

A link to this Workspace will be included in the email message. Only members will be able to access the link.

To:

Email

Subject:

Message:

Notify Members page

Use the Notify Members page to compose and send an email message to workspace members. The To field is automatically populated with addresses for all members of the workspace who have defined an email address in their system profile.

Note. The email will contain a link to the workspace. Only members of the workspace will be able to access the workspace through the link.

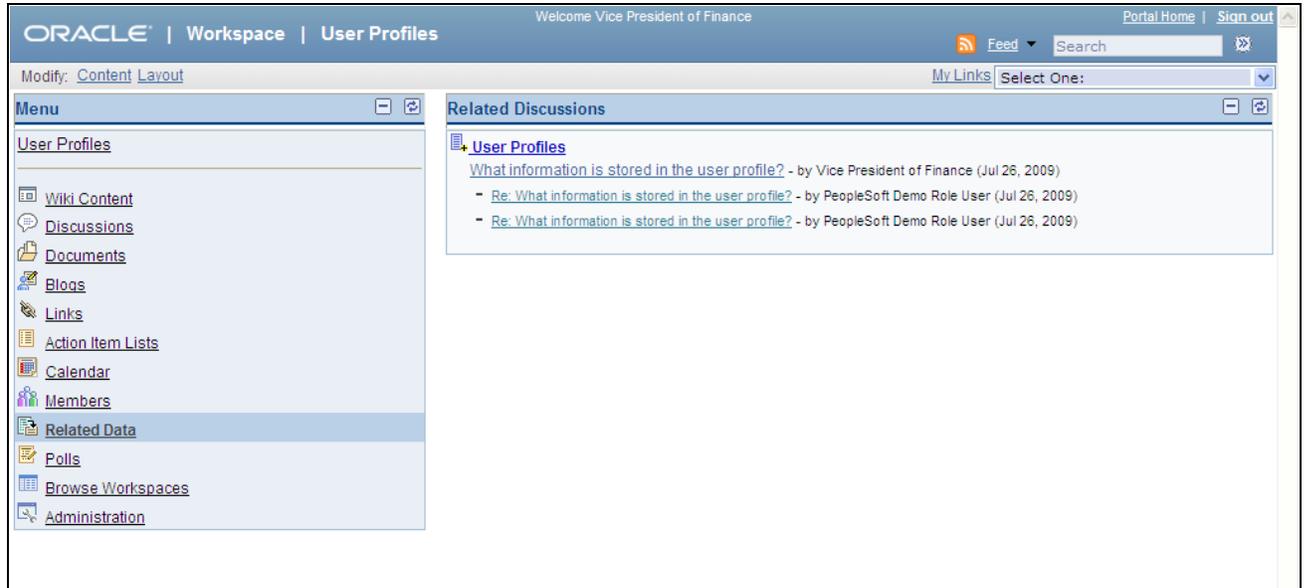
To Enter additional email addresses for workspace members separated by commas.

Subject Enter a subject for the email.

- Message** Enter the message text for your email.
- Notify** Click to send the notification.

Using the Related Data Module

Access the Related Data module (click the Related Data link in the workspace menu).

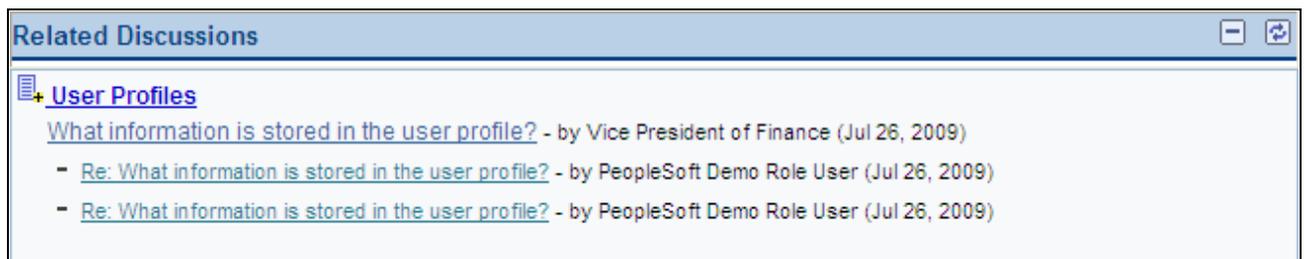


Related Data module

The Related Data module displays pagelets that have been selected on the Administration - Module page. This module can be used to display pagelets that are useful for the projects being worked on in the workspace.

Using the Related Discussions Pagelet

Access the Related Data module (click the Related Data link in the workspace menu).



Related Discussions pagelet

Use the Related Discussions pagelet to view and participate in related discussions that have been linked to the workspace. Related discussions are created and maintained on transaction pages through the Related Discussion related content service.

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Using Portal Features*, "Working With the Related Discussion Service," Managing Discussion Forums in the Related Discussion Service.

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Using Portal Features*, "Working With the Related Discussion Service," Participating in Discussion Forums in the Related Discussion Service.

A related discussion can be linked to a workspace through the Related Links related content service.

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Using Portal Features*, "Working With the Related Links Service," Creating and Using Links with the Related Links Service.

Using the Polls Module

This section provides an overview of the Polls module and discusses how to use the Poll pagelet.

Understanding the Polls Module

The Polls module enables workspace administrators to create poll questions and review poll results. Polls are a simple way for you to gather opinions and comments from workspace members using the Poll pagelet that is displayed on the workspace homepage. The Poll pagelet displays a single question and enables users to submit a response and add comments. Until a workspace member has answered the current question, the pagelet displays the poll question only. After a member has responded, the pagelet displays the current poll results.

The pages used to manage the workspace poll in the Polls module are the same pages used in the Polls feature available from the PeopleSoft Enterprise Portal homepage. When a workspace administrator clicks the Polls link in the workspace menu, he or she is taken to the Maintain Polls page, which functions similar to the Maintain Polls page in the portal. The Polls feature is documented in the *PeopleSoft Enterprise Portal 9.1 PeopleBook: Using Portal Features*.

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Using Portal Features*, "Managing Polls."

Working With the Poll Pagelet

Access the Poll pagelet on the workspace homepage.

Poll

How often do you access this Workspace?

Response Choices and Display Text

Daily

Weekly

Monthly

Rarely

Comments:

Submit

[Edit Poll](#)

Poll pagelet (general workspace member before answering the poll question)

Poll

How often do you access this Workspace?

Response	Votes	Percent
Daily	2	66.67
Weekly	1	33.33

Total Responses: 3

[Edit Poll](#) [View Results](#)

Poll pagelet (workspace administrator after answering the poll question)

Use the Poll pagelet to submit a response to the currently displayed poll question. After you have submitted a response, the pagelet displays the current poll results. If you are the workspace administrator, the pagelet also displays convenient links to help you maintain the poll and view complete results.

Response Choices Select your response to this poll question from the available choices.

Comments Enter your comments if the administrator has enabled comments for this poll question.

Submit Click to submit your response to the poll.

After responding to a workspace poll, you will see the poll results displayed in the pagelet.

Edit Poll	If you are a workspace administrator, click this link to access the Maintain Polls page in the Polls module.
View Results	If you are a workspace administrator, click this link to access the Poll Results page in the Polls module.

Using the Browse Workspaces Module

The Workspaces - Search page, Workspaces - Hierarchy page, and Browse By Category page that are available in the Browse Workspaces module of each workspace are the same pages as those available from the portal homepage.

See [Chapter 5, "Working in Collaborative Workspaces," Searching for Workspaces, page 95.](#)

See [Chapter 5, "Working in Collaborative Workspaces," Browsing the Workspace Hierarchy, page 96.](#)

See [Chapter 5, "Working in Collaborative Workspaces," Browsing Workspaces by Category, page 97.](#)

Searching Within Workspaces

This section provides an overview of searching within workspaces and discusses how to:

- Search from the workspace header.
- Search within selected workspace modules.

Understanding Searching Within Workspaces

You can search for items within a workspace in two ways:

- Using the Search field in the workspace header.

When you use the Search field in the workspace header, your initial search scope is all modules within the workspace. The modules searched include:

- Action Item Lists
 - Blogs
 - Calendar
 - Discussions
 - Documents
 - Links
 - Members
 - Wiki Content
- Using the Search link in selected workspace modules.

When you use the Search link in a selected workspace module, your initial search scope is that particular module. The following modules provide a Search link:

- Action Item Lists
- Blogs
- Calendar
- Discussions
- Documents
- Links
- Members

You build workspace search collections by running the Build Search Indexes Application Engine process (EO_PE_IBLDR) using the delivered *PAPP_COLLABORATIVE_WORKSPACES* run control ID.

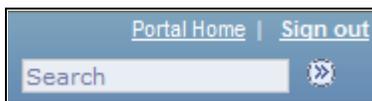
Pages Used to Search Within a Workspace

Page Name	Definition Name	Navigation	Usage
Search Workspaces	EPPCW_SEARCH	<ul style="list-style-type: none"> • Enter the search string in the Search field and press ENTER. •  Enter the search string in the Search field and click the Search button. 	Perform a search within all workspace modules.

Page Name	Definition Name	Navigation	Usage
Search Workspaces	EPPCW_SEARCH	<ul style="list-style-type: none"> Click the Search link in the Action Item Lists module. Click the Search link in the Blogs module. Click the Search Blogs link in the Blogs pagelet. Click the Search link in the Calendar module. Click the Search link in the Discussions module. Click the Search link in the Documents module. Click the Search link in the Links module. Click the Search link in the Members module. 	Perform a search within the selected workspace module.
Search Tips	EO_PE_SRCH_TIPS	Click the Search Tips link on the Search Workspaces page.	Display search syntax and examples.

Searching from the Workspace Header

Access the Search field in the workspace header.



Search field in the workspace header

The Search field in the workspace header allows you to search all modules in the current workspace.

To perform a search from the workspace header:

1. Click to place the cursor in the Search field in the workspace header.
2. Enter the search criteria.
3. Press Enter. Alternatively, click the Search button adjacent to the Search field.

The Search Workspaces page appears displaying search results from all modules in the current workspace.

You can refine your results by selecting all workspaces, selecting specific workspace modules, or changing the search criteria.

See [Chapter 5, "Working in Collaborative Workspaces," Searching Within Selected Workspace Modules, page 146.](#)

Searching Within Selected Workspace Modules

Access the Search Workspaces page (click the Search link in a specific workspace module).

Search Workspaces

Enter search keywords, using quotes for any phrases. Click [Search Tips](#) for more details. Select 'Current Workspace' to retrieve listings from the current workspace. Select the module(s) to be searched.

Search Text: [Search Tips](#)

Search In: Current Workspace All Workspaces

Module: Discussions Links Action Items Blogs
 Documents Members Events Wiki

[Hide Summaries](#)

Search Results [Find](#) | [View All](#) First 1-3 of 3 Last

1	Office Information Information about our offices Module: Documents Source: Rich Ammerton Workspace: Demo Workspace Tags: No Tags Available	Rating: 0.93
2	Office Services Office Services Module: Documents Source: Rich Ammerton Workspace: Demo Workspace Tags: No Tags Available	Rating: 0.88
3	Transportation Info Transportation Info Module: Documents Source: Rich Ammerton Workspace: Demo Workspace Tags: No Tags Available	Rating: 0.80

[Return to Documents](#)

Search Workspaces page

Use the Search Workspaces page to specify search criteria including search text, workspace scope (current or all), and modules to be searched.

Search Text Enter the search criteria.

Search Tips Click to display search syntax and examples on the Search Tips page.
 See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Using Portal Features*, "Submitting Searches in the Portal," Search Considerations and Syntax.

Search In *Current Workspace.* Select to search in the current workspace only
All Workspaces. Select to search in all workspaces of which you are a member.

Module	Select one or more modules in which you want to search. Available modules include: <i>Discussions</i> <i>Links</i> <i>Action Items</i> <i>Blogs</i> <i>Documents</i> <i>Members</i> <i>Events</i> <i>Wiki</i>
Search	Click to perform the search.
Hide Summaries and Show Summaries	Click to hide or show the summaries in the search results.
Search Results	Click a link to view that item.
Return to <Module>	If the search originated from a particular module, click to return to that module.

Viewing and Subscribing to Feeds Within a Workspace

This section provides an overview of workspace feeds and lists the pages used to view and subscribe to feeds within a workspace.

Understanding Workspace Feeds

A PeopleSoft Enterprise Portal workspace has various types of content that is suitable for publication and consumption as feeds. Oracle has provided you with the tools within a workspace that facilitate the publication and consumption of this content as feeds.

Within a workspace, separate feeds can be published for each of three workspace modules—the Blogs module, the Discussions module, and the Documents module. The workspace administrator and certain other members with sufficient privileges can publish content from these three modules as a feed. Feed publication is documented in the *PeopleSoft Enterprise Portal 9.1 PeopleBook: Using Portal Features*.

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Using Portal Features*, "Working With Feeds and Alerts," Publishing PeopleSoft Enterprise Portal Content as a Feed.

In addition, one or more feeds can be published for the entire workspace, each of which is known as a *workspace feed*. Only the workspace administrator can publish a workspace feed and is responsible for selecting which modules will be included in that feed. A workspace feed can be configured to include content from one or more of the following modules:

- Action Item Lists

- Blogs
- Calendar
- Discussions
- Documents
- Wiki Content

Publication of the workspace feed is covered within this PeopleBook.

See [Chapter 4, "Administering Collaborative Workspaces," Administering Workspace Feeds, page 79.](#)

As a consumer of feed data, you can find feed documents accessible in convenient locations across the workspace—in the workspace header, in specific pagelets on the workspace homepage, and on the pages you use to manage and create specific workspace content. Use the Feed button, Feed link, and Open menu button to view feed documents for content published within the workspace.



Hover over either of these to view the list of feeds published for this item. Click any list item to open that feed document.

Click the Feed button or Feed link to open the first feed document in the list.



Hover over to view the list of feeds published for this item. Click any list item to open that feed document.

Click the Open menu button to toggle the list of feeds between frozen open and closed.

More information about viewing and subscribing to feeds can be found in the *PeopleSoft Enterprise Portal 9.1 PeopleBook: Using Portal Features*.

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Using Portal Features*, "Working With Feeds and Alerts," Viewing and Subscribing to Feeds.

Pages Used to View and Subscribe to Feeds in a Workspace

Page Name	Definition Name	Navigation	Usage
<Workspace Name>	EPPBL_VIEW_POSTS	In the workspace menu, click the Blogs link.	Displays the feed for the Blogs module.
<Workspace Name>	EPPBL_VIEW_COMMENT	Click the link for a post or comment in the Blogs module.	Displays the feed for the Blogs module.
Discussions	EPPDF_FORUM	In the workspace menu, click the Discussions link.	Displays the feed for the Discussions module.
Post Details	EPPDF_VIEW_TOPIC	Click the link for a topic or reply in the Discussions module.	Displays the feed for the Discussions module.

Page Name	Definition Name	Navigation	Usage
Documents	EPPCM_HIER_MAIN	In the workspace menu, click the Documents link.	Displays the feed for the Documents module.

Creating and Using Tags in Workspaces

This section provides an overview of tags in workspaces and discusses how to use the Tags pagelet.

Understanding Tags in Workspaces

Similar to portals and sites, you can create and view tags for blogs, blog postings, discussion forum topics, and documents found within the workspace. In addition, you can create and view tags for the workspace itself.

In a workspace, the Tags pagelet allows you to view the tags for the workspace itself, create tags for the workspace itself, and view a tag cloud encompassing all public tags used within the workspace.

The page controls used to create and view tags for blogs, blog postings, discussion forum topics, and documents within a workspace are similar to the page controls used within a portal. In addition, the Search Tags page available in a workspace is similar to the Search Tags page available from the PeopleSoft Enterprise Portal homepage with an additional scope for the current workspace. These aspects of the tagging feature are documented in the *PeopleSoft Enterprise Portal 9.1 PeopleBook: Using Portal Features*.

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Using Portal Features*, "Working With Tags."

Using the Tags Pagelet

This section discusses how to:

- View the workspace tag list.
- Create workspace tags.
- View the workspace tag cloud.

Viewing the Workspace Tag List

Access the Tags pagelet on the workspace homepage.



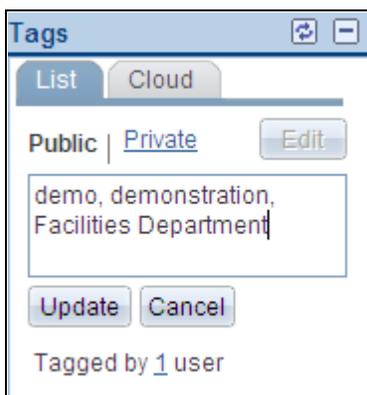
Tags pagelet - List tab (view mode)

Use the List tab of the Workspace pagelet to view the list of tags for the workspace itself.

- Cloud** Select to view the tag cloud for all public tags used within the workspace.
- Public** Select to view all public tags for the workspace itself.
- Private** Select to view all of your private tags for the workspace itself.
- Edit** Click the Edit button to edit your public or private tags for the workspace itself.
- <tag>** Click a tag to go to the Search Tags page to view a list of items within the workspace tagged with that tag.
- <#> users** Hover over the number of users to view which users have tagged the workspace.

Creating Workspace Tags

Access the Tags pagelet on the workspace homepage; then click the Edit button.



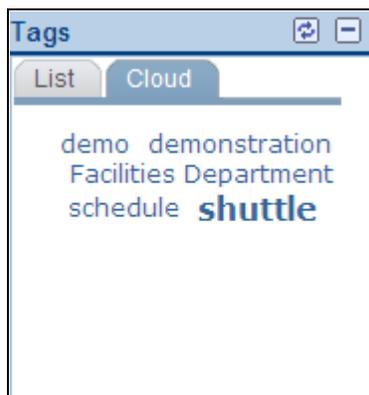
Tags pagelet - List tab (edit mode)

Use the List tab of the Workspace pagelet to edit your tags for the workspace itself.

Cloud	Select to view the tag cloud for all public tags used within the workspace.
Public	Select to edit your public tags for the workspace itself.
Private	Select to edit your private tags for the workspace itself.
<tag>	Enter tags or tag phrases separated by a comma.
<#> users	Hover over the number of users to view which users have tagged the workspace.
Update	Click the Update button to save your changes.
Cancel	Click the Cancel button to cancel any changes.

Viewing the Workspace Tag Cloud

Access the Cloud tab (select Cloud in the Tags pagelet).



Tags pagelet - Cloud tab

Use the Cloud tab to view the tag cloud of all public tags used within the workspace.

List	Select to view the list of tags for the workspace itself.
<tag>	Click a tag to go to the Search Tags page to view a list of items within the workspace tagged with that tag.

Working With Additional Workspace Pagelets

Additional pagelets are included with each workspace and can be added to the workspace homepage. These pagelets include:

- Email pagelet
- Feed Reader pagelet

Working With the Email Pagelet

The Email pagelet in workspaces is the same as the Email pagelet that can be added to the portal homepage.

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Using Portal Features*, "Using External Email, Calendar Data, and Instant Messaging," Working With the Email Pagelet.

Working With the Feed Reader Pagelet

The Feed Reader pagelet in workspaces is the same as the Feed Reader pagelet that can be added to the portal homepage.

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Using Portal Features*, "Working With Homepage Pagelets," Working With the Feed Reader Pagelet.

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