

## **Oracle Utilities Customer Self Service**

Whitepaper: Customizing and Extending the OUCSS  
Custom Portal

Release 2.1.0.1

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# Chapter 1

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## Overview

This whitepaper describes the steps required to customize and re-brand OUCSS Custom Portals.

## Additional Resources

Further information is available in the *Developing Portals with Oracle WebCenter Portal (11.1.1.8.0)*, available on the OTN at [http://docs.oracle.com/cd/E29542\\_01/webcenter.1111/e27739/toc.htm](http://docs.oracle.com/cd/E29542_01/webcenter.1111/e27739/toc.htm).

**Note:** This document and related documentation is subject to revision and updating. For the most recent versions of documentation relating to this produce, as well as information on functionality and known issues for other Oracle products that may be required for installation and proper functionality of this product, check the Oracle Utilities Customer Self Service section of the [Oracle Utilities Documentation](#) area on the Oracle Technology Network (OTN) web site (<http://www.oracle.com/technetwork/apps-tech/utilities/documentation/index.html>).

## Abbreviations

CCB - Oracle Utilities Customer Care and Billing

MDM - Oracle Utilities Customer Care and Billing

DDL – Data Definition Language

MDS – Metadata Services

OUCSS – Oracle Utilities Customer Self Service

Portal – Oracle WebCenter Portal Framework

Rest – Representational State Transfer

# Chapter 2

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## Preparation and Procedures

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### Software Requirements

Please refer to the *Oracle Utilities Customer Self Service Installation Guide* for product-specific versions and the current patch level.

### Pre-Installation Tasks

The following tasks should be completed before you can customize OUCSS Portal.

- Ensure that your Oracle JDeveloper version is 11gR1 PS6 (11.1.1.7.0).
- Ensure that the WebCenter Extension bundle (11.1.1.8.0) is enabled in JDeveloper.
- Ensure that your OUCSS (custom) Portal has been deployed and is running.

### Assumptions

- The OUCSS Portal is built using the “WebCenter Portal Framework” application template.
- The Custom Portal is deployed onto an Oracle WebLogic (10.3.6) server.
- The OUCSS Schema is created and populated with seed data. For running the taskflows, a data source with jndi name “jdbc/OUCSSDS” is also expected in the target application server.
- For taskflows that require the sending of emails (e.g., Registration, Invite, etc.), a mail session with the jndi name “mail/OUCSS” is also expected on the target application server.

**Note:** The following information is not within the scope of this document:

- Setup of database and MDS or other schemas required by the custom portal.
- Detailed security of the custom portal to restrict access to taskflows, page templates, navigation models, and/or portal pages.

## Portal Extension

OUCSS Portal can be extended by creating custom taskflows and pages using **ExtendOUCSSPortal** workspace included in ExtendOUCSSPortal.zip. The ExtendOUCSSPortal workspace includes three projects: OUCSSPortalADFLibrary, OUCSSRestExtensionLibrary and OUCSSPortalSharedLibrary.

The OUCSSPortalADFLibrary project is used to add portal artifacts (taskflows and pages) and the OUCSSRestExtensionLibrary project is used to extend OUCSS Rest Services and adding custom services. The OUCSSPortalSharedLibrary project is used for redeploying the **extend.oucsc.portal** shared library.

**Note:** You can add pages at runtime from Administrator -> Pages screen. For smooth OUCSS upgrade, it is recommended to create pages using Extend OUCSS Portal approach.

## About Security

OUCSS Portal is secured and requires permissions to be granted to render custom taskflows and pages. The OUCSS Portal's security is implemented with required permissions to allow rendering of taskflows deployed using the OUCSSPortalADFLibrary project. For this to work, however, the

Taskflow definition should be created under

```
<<ExtensionWorkSpace>>/OUCSSPortalADFLibrary/public_html/WEB-INF/oracle/ugbu/ss/custom/secure
```

and/or

```
<<ExtensionWorkSpace>>/OUCSSPortalADFLibrary/public_html/WEB-INF/oracle/ugbu/ss/custom/public
```

Custom Pages and Taskflow fragments should also be created under

```
<<ExtensionWorkSpace>>/OUCSSPortalADFLibrary/public_html/oracle/ugbu/ss/custom/pages/secure
```

and/or

```
<<ExtensionWorkSpace>>/OUCSSPortalADFLibrary/public_html/oracle/ugbu/ss/custom/pages/public
```

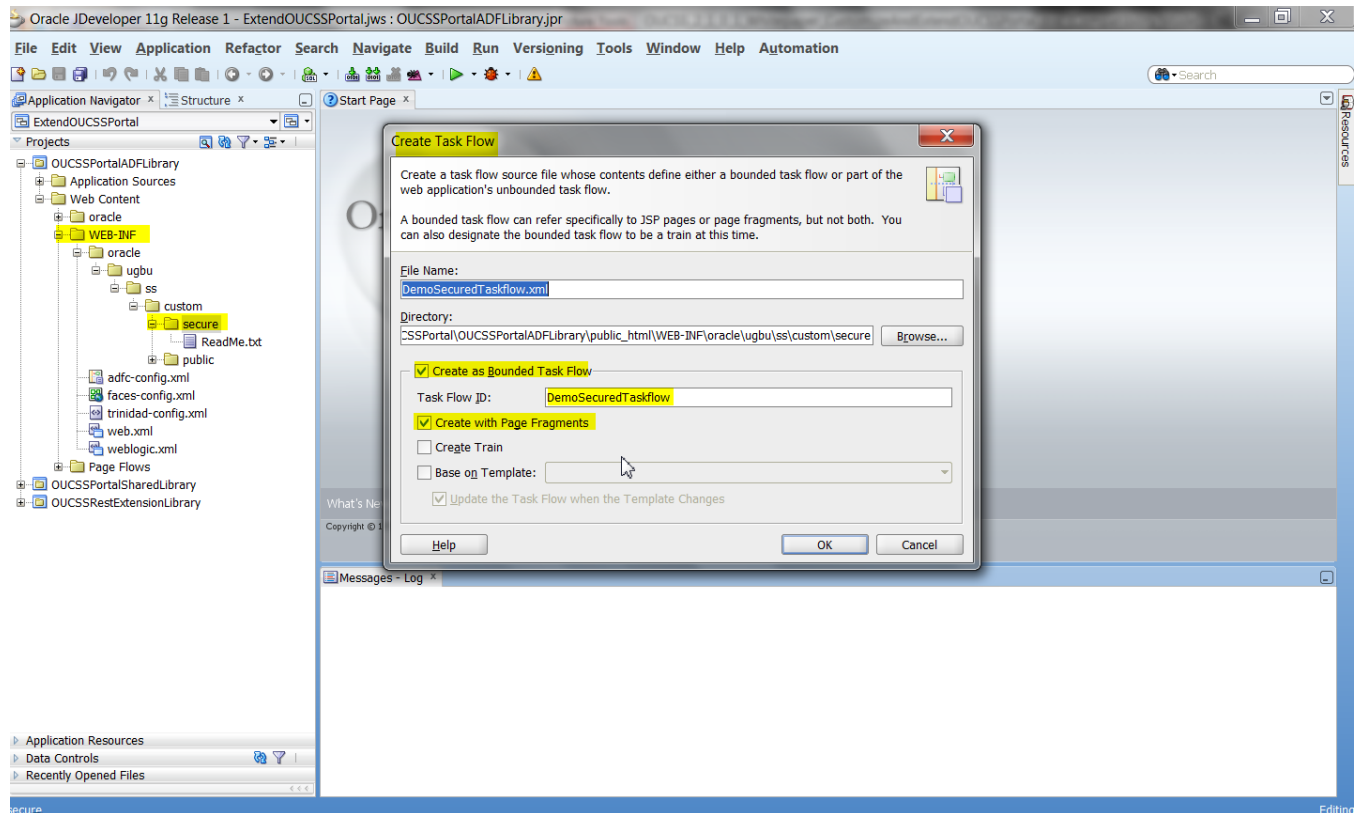
Use the following security criteria when creating taskflows:

- Create taskflows under `\WEB-INF\oracle\ugbu\ss\custom\secure` if access is to be restricted to authenticated users (e.g, logged-in users).
- Create taskflows under `\WEB-INF\oracle\ugbu\ss\custom\public` if the taskflows are to be accessible to all users (including public users).
- Create pages/fragments under `\oracle\ugbu\ss\custom\pages\secure` if the pages should be accessible only to authenticated users (e.g, logged-in users).
- Create pages/fragments under `\oracle\ugbu\ss\custom\pages\public` if the pages should be accessible to all users (including public users).

The OUCSS Portal Administrator can manage the pages and taskflows created under both secure and public folders.

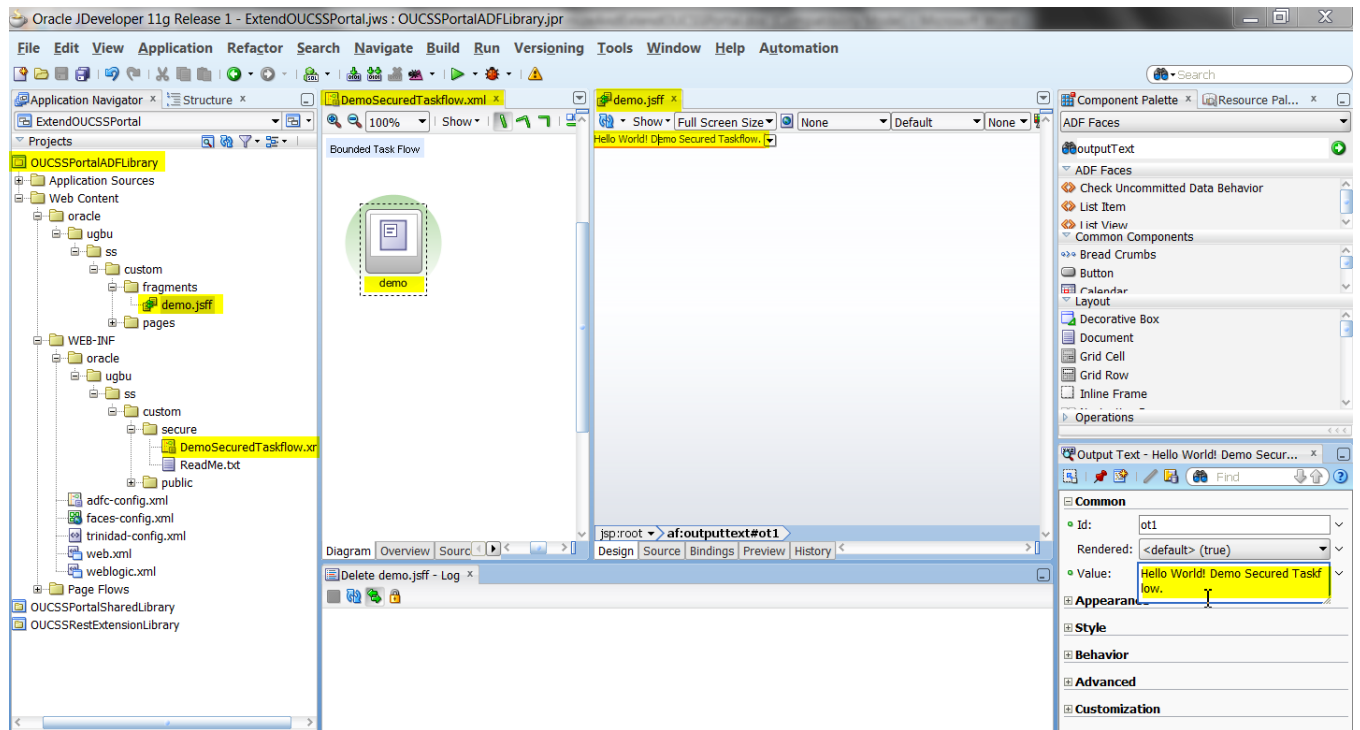
# Adding New Taskflows and Pages

- 1 Extract the contents of **ExtendOUCSSPortal.zip** and open **ExtendOUCSSPortal.jws** in JDeveloper.
- 2 Select the `public_html\WEB-INF\oracle\ugbu\ss\custom\secure` folder in the **OUCSSPortalADFLibrary** project and add a new ADF Taskflow.



- 3 For the purposes of this demo, we'll create a secure taskflow containing one view/jsff that displays, "Hello World! Demo Secured Taskflow". Create the demo.jsff

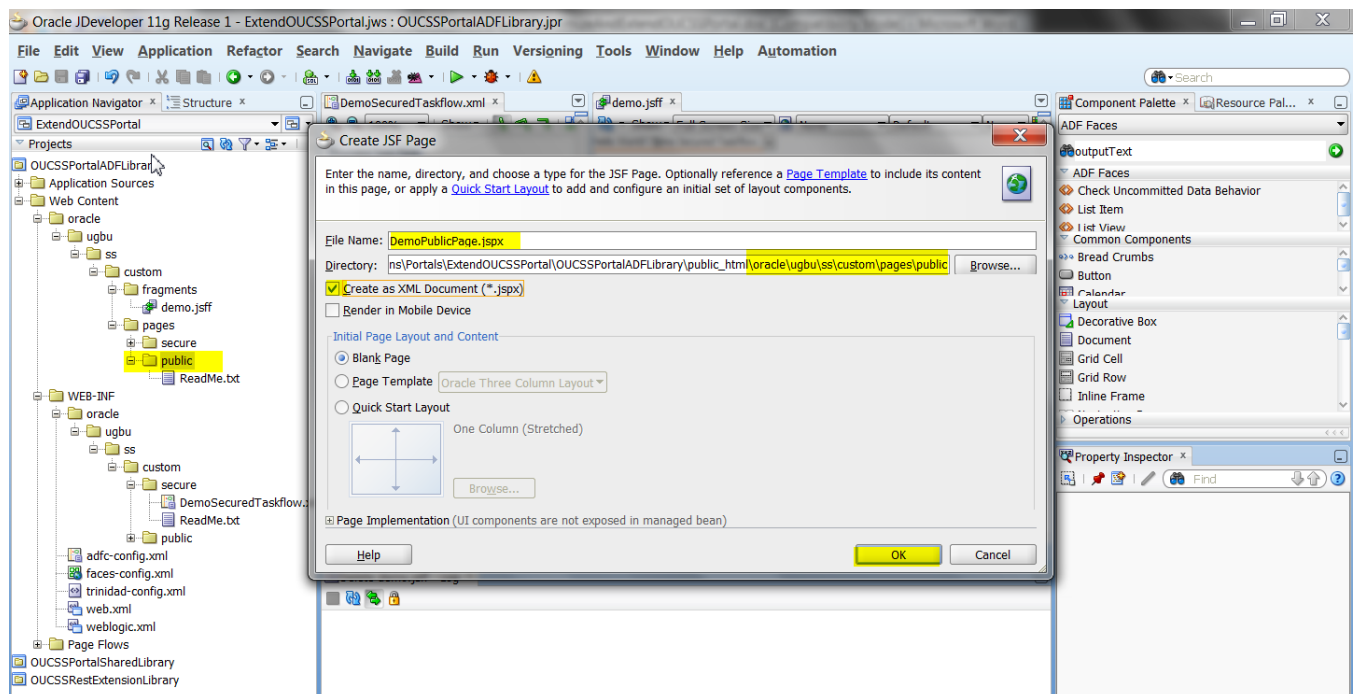


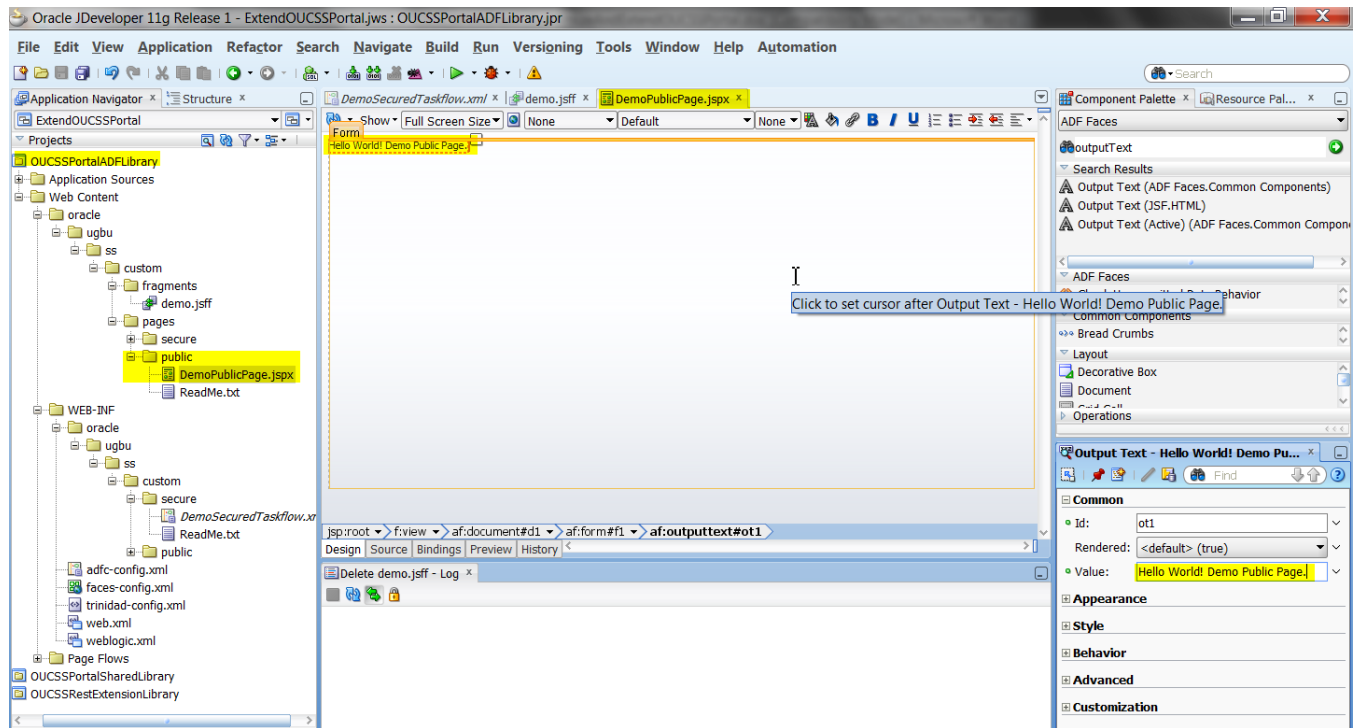


- 4 Repeat step 2 and 3 to create other secured and public taskflows.
- 5 Select the /public\_html/oracle/ugbu/ss/custom/public folder in the **OUCSSPortalADFLibrary** project and add a new Page (jspx).

For the purposes of this demo, a page named DemoPublicPage.jspx is created that contains the text, “Hello World! Demo Public Page.”.

**Note:** Always, add a Page Definition for all pages added in ExtendOUCSSPortal project for the security to work. If the page definition is not added, then the page may not render in Portal.





- 6 The newly-created page should reference a page template and page editor to enable runtime customization. To create the references:

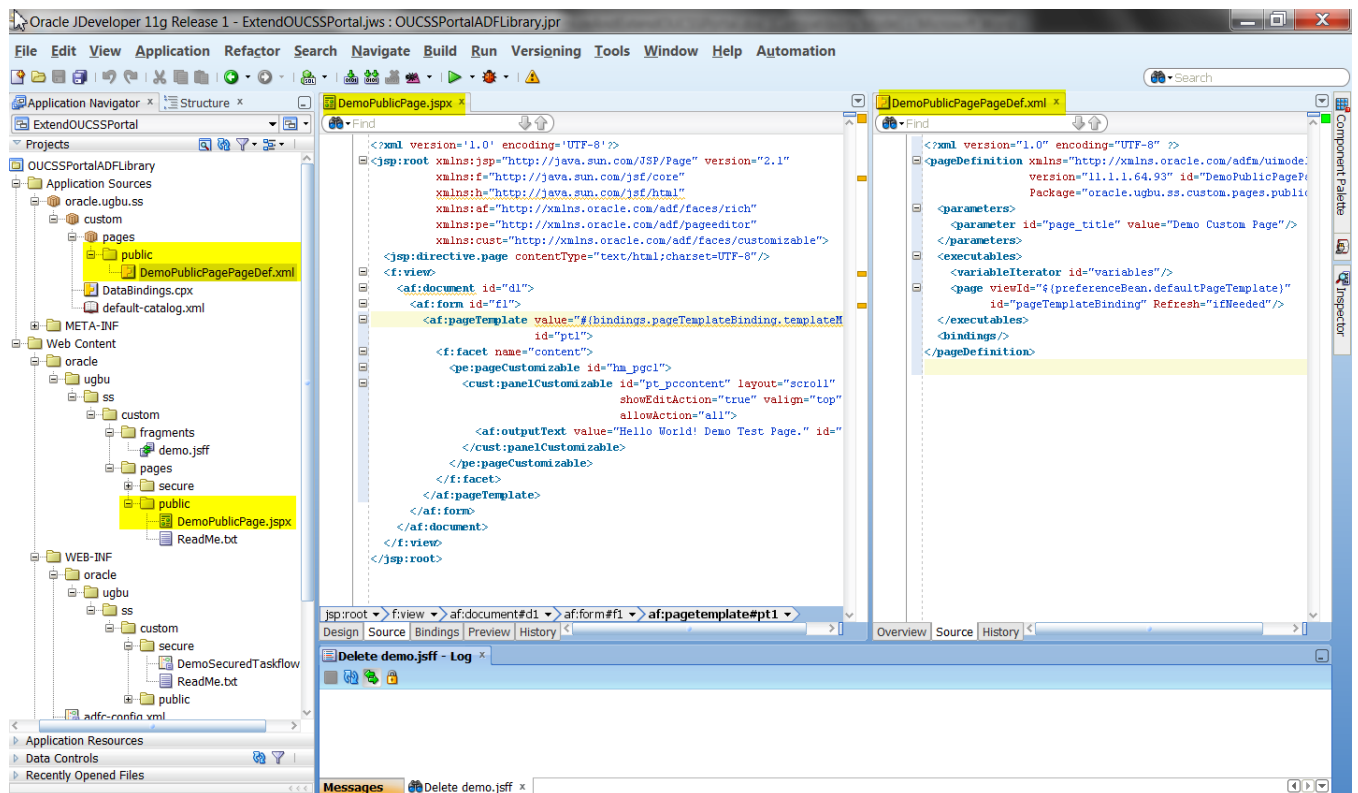
- Modify JSPX to:

```
<?xml version='1.0' encoding='UTF-8'?>
<jsp:root xmlns:jsp="http://java.sun.com/JSP/Page" version="2.1"
  xmlns:f="http://java.sun.com/jsf/core"
  xmlns:h="http://java.sun.com/jsf/html"
  xmlns:af="http://xmlns.oracle.com/adf/faces/rich"
  xmlns:pe="http://xmlns.oracle.com/adf/pageeditor"
  xmlns:cust="http://xmlns.oracle.com/adf/faces/customizable">
  <jsp:directive.page contentType="text/html; charset=UTF-8"/>
  <f:view>
    <af:document id="d1">
      <af:form id="f1">
        <af:pageTemplate value="#{bindings.pageTemplateBinding.templateModel}"
          id="pt1">
          <f:facet name="content">
            <pe:pageCustomizable id="hm_pgcl">
              <cust:panelCustomizable id="pt_pccontent" layout="scroll"
                showEditAction="true" valign="top"
                allowAction="all">
                <af:outputText value="Hello World! Demo Test Page." id="ot1"/>
              </cust:panelCustomizable>
            </pe:pageCustomizable>
          </f:facet>
        </af:pageTemplate>
      </af:form>
    </af:document>
  </f:view>
</jsp:root>
```

- Modify Page Def to:

```
<?xml version="1.0" encoding="UTF-8" ?>
<pageDefinition xmlns="http://xmlns.oracle.com/adfm/uimodel"
    version="11.1.1.64.93" id="DemoPublicPagePageDef"
    Package="oracle.ugbu.ss.custom.pages.public">

    <parameters>
        <parameter id="page_title" value="Demo Custom Page"/>
    </parameters>
    <executables>
        <variableIterator id="variables"/>
        <page viewId="{${preferenceBean.defaultPageTemplate}}"
            id="pageTemplateBinding" Refresh="ifNeeded"/>
    </executables>
    <bindings/>
</pageDefinition>
```



- 7 Repeat step 4 and 5 to create other secured and public pages.
- 8 After deployment of exted.ouc.ss.portal shared library,
- 9 Review the [Configure the Resource Catalog](#) section of this document to consume the taskflow in OUCSS Portal.
- 10 Review the [Access Pages from Extend OUCSS Portal](#) section of this document to access page in OUCSS Portal.

## Accessing User Account Details

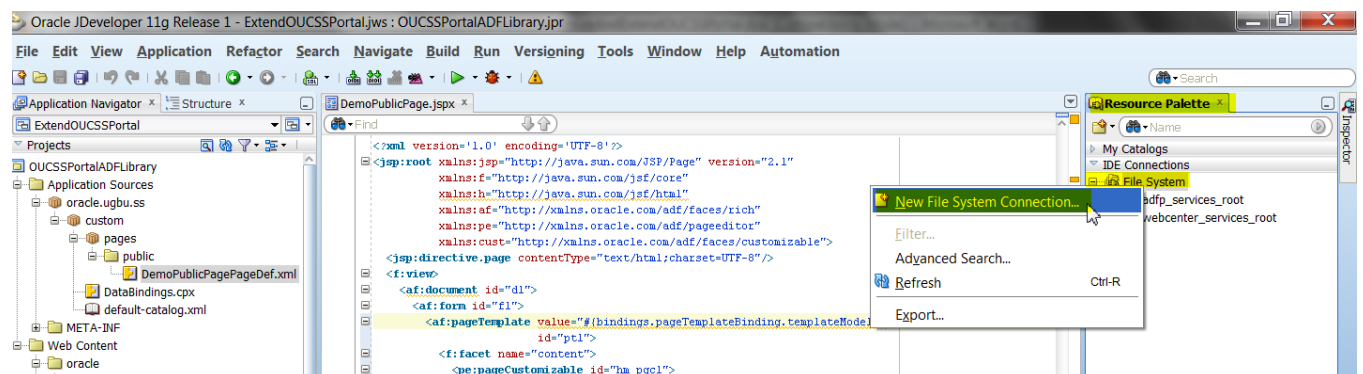
Account details and other OUCSS API can be accessed in custom pages and taskflow views by referring to the Utilities Shared jar from the OUCSS Shared module.

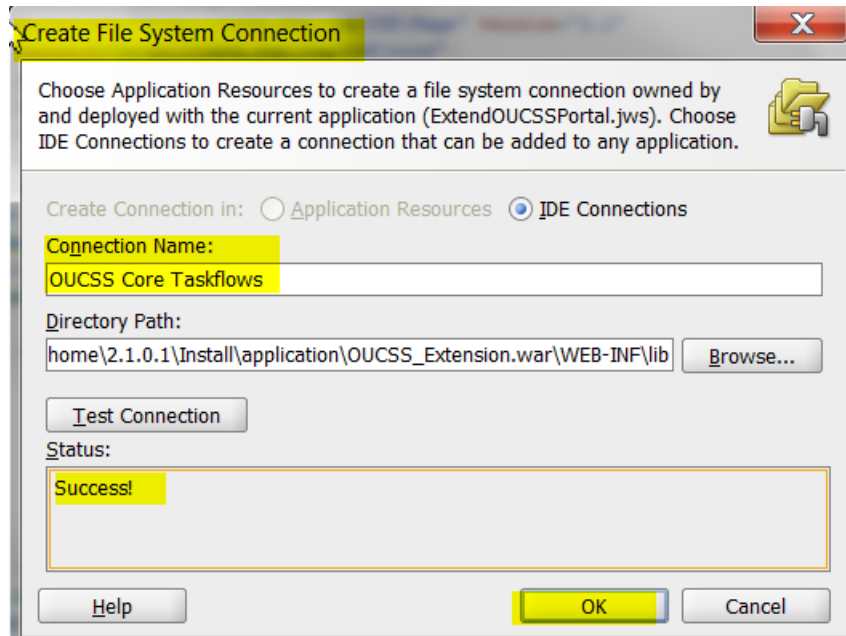
In this example, a managed bean is created and accessed using the Secured Taskflow. The managed bean will retrieve accounts of a logged-in user and display the list in the taskflow.

- 1 Unjar/unzip the OUCSS\_Extension.war file from <<webcenter\_WSS\_zip>>\Install\application\ into a folder that is accessible to JDeveloper.

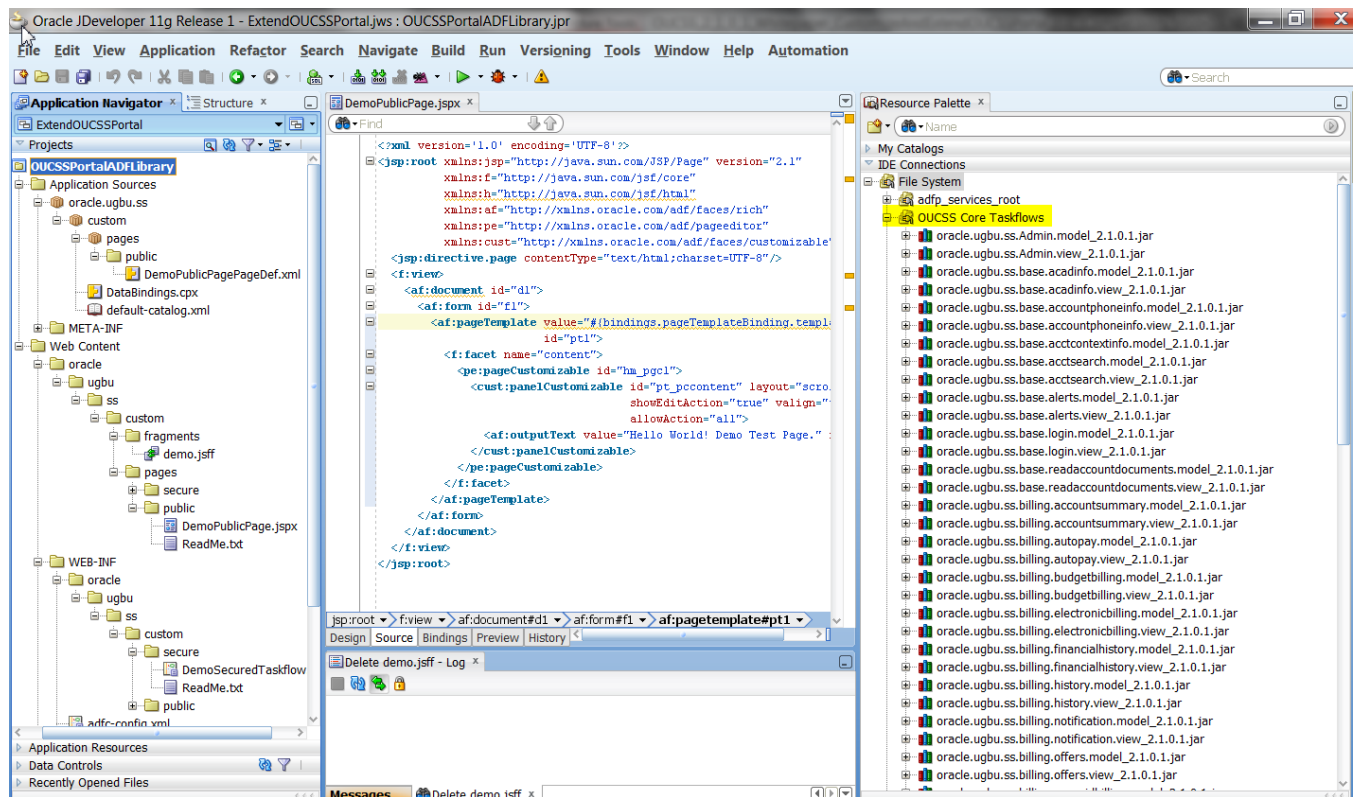
Name	Date modified	Type	Size
oracle.ugbu.ss.Admin.model_2.1.0.1.jar	4/15/2014 6:53 PM	Executable Jar File	2,220 KB
oracle.ugbu.ss.Admin.view_2.1.0.1.jar	4/15/2014 6:53 PM	Executable Jar File	414 KB
oracle.ugbu.ss.base.acadinfo.model_2.1.0.1.jar	4/15/2014 6:53 PM	Executable Jar File	105 KB
oracle.ugbu.ss.base.acadinfo.view_2.1.0.1.jar	4/15/2014 6:53 PM	Executable Jar File	73 KB
oracle.ugbu.ss.base.accountphoneinfo.model_2.1.0.1.jar	4/15/2014 6:53 PM	Executable Jar File	102 KB
oracle.ugbu.ss.base.accountphoneinfo.view_2.1.0.1.jar	4/15/2014 6:53 PM	Executable Jar File	66 KB
oracle.ugbu.ss.base.acctcontextinfo.model_2.1.0.1.jar	4/15/2014 6:53 PM	Executable Jar File	79 KB
oracle.ugbu.ss.base.acctsearch.model_2.1.0.1.jar	4/15/2014 6:53 PM	Executable Jar File	65 KB
oracle.ugbu.ss.base.acctsearch.view_2.1.0.1.jar	4/15/2014 6:53 PM	Executable Jar File	91 KB
oracle.ugbu.ss.base.alerts.model_2.1.0.1.jar	4/15/2014 6:53 PM	Executable Jar File	44 KB
oracle.ugbu.ss.base.alerts.view_2.1.0.1.jar	4/15/2014 6:53 PM	Executable Jar File	36 KB
oracle.ugbu.ss.base.login.model_2.1.0.1.jar	4/15/2014 6:53 PM	Executable Jar File	121 KB
oracle.ugbu.ss.base.login.view_2.1.0.1.jar	4/15/2014 6:53 PM	Executable Jar File	249 KB
oracle.ugbu.ss.base.readaccountdocuments.model_2.1.0.1.jar	4/15/2014 6:53 PM	Executable Jar File	113 KB
oracle.ugbu.ss.base.readaccountdocuments.view_2.1.0.1.jar	4/15/2014 6:53 PM	Executable Jar File	41 KB
oracle.ugbu.ss.billing.accountssummary.model_2.1.0.1.jar	4/15/2014 6:53 PM	Executable Jar File	53 KB
oracle.ugbu.ss.billing.accountssummary.view_2.1.0.1.jar	4/15/2014 6:53 PM	Executable Jar File	35 KB
oracle.ugbu.ss.billing.autopay.model_2.1.0.1.jar	4/15/2014 6:53 PM	Executable Jar File	92 KB
oracle.ugbu.ss.billing.autopay.view_2.1.0.1.jar	4/15/2014 6:53 PM	Executable Jar File	68 KB
oracle.ugbu.ss.billing.budgetbilling.model_2.1.0.1.jar	4/15/2014 6:53 PM	Executable Jar File	161 KB
oracle.ugbu.ss.billing.budgetbilling.view_2.1.0.1.jar	4/15/2014 6:53 PM	Executable Jar File	61 KB
oracle.ugbu.ss.billing.electronicbilling.model_2.1.0.1.jar	4/15/2014 6:53 PM	Executable Jar File	84 KB
oracle.ugbu.ss.billing.electronicbilling.view_2.1.0.1.jar	4/15/2014 6:53 PM	Executable Jar File	60 KB

- 2 Using JDeveloper's Resource Palette, create a File System Connection with the name "OUCSS\_Taskflows" using the <<Unzip\_Folder>>\WEB-INF\lib directory created in the previous step.



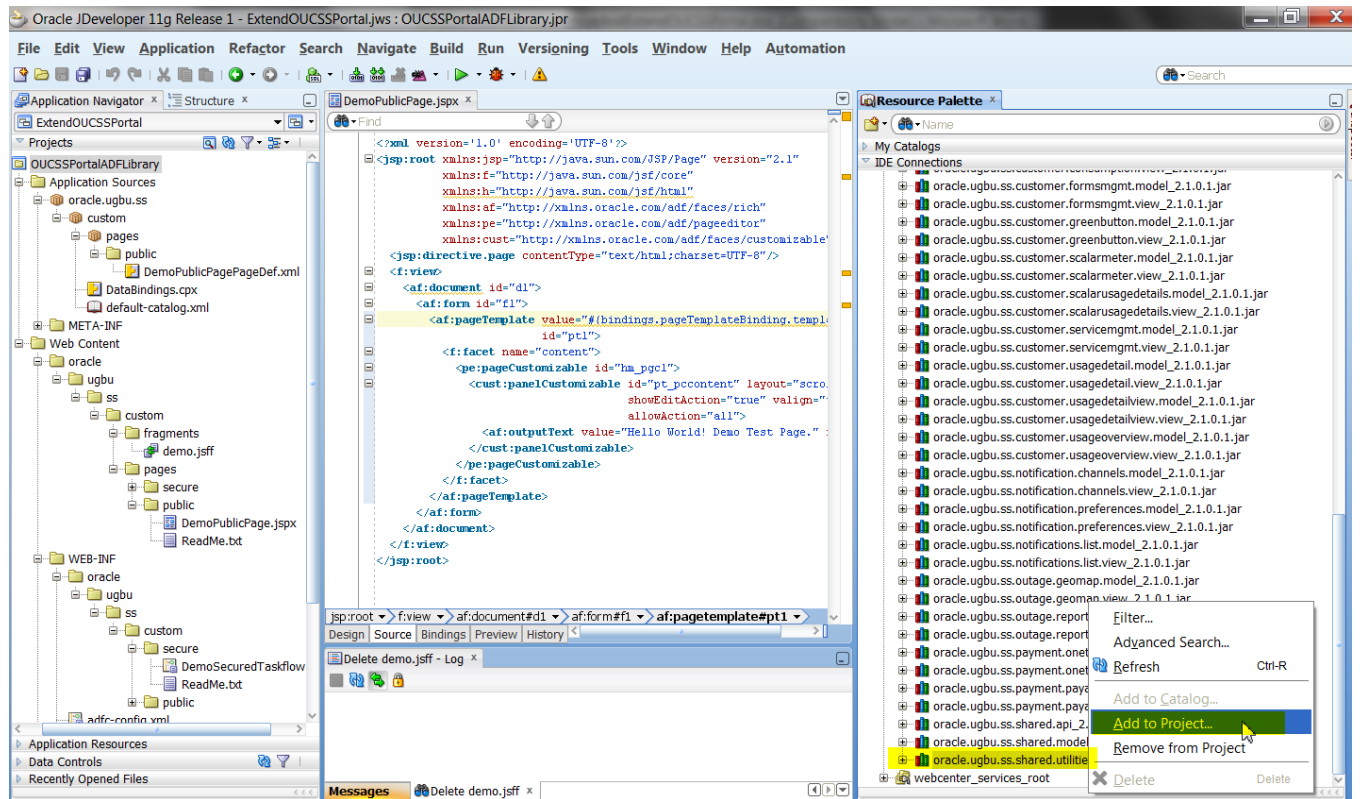


- 3 Click **OK** to see the OUCSS libraries under “OUCSS Core Taskflows” in the Resource Palette.

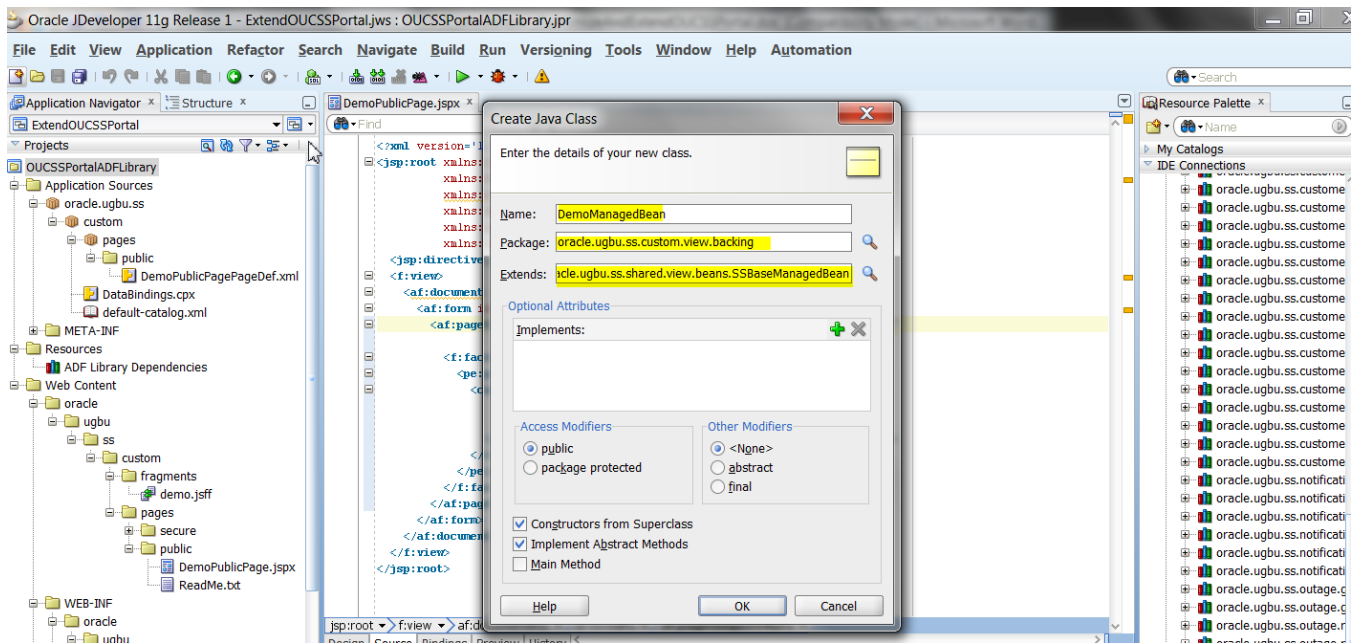


- 4 Make sure the OUCSSPortalADFLibrary project is selected in JDeveloper. Right-click oracle.ugbu.ss.shared.utilities under the OUCSS Core Taskflows File System connection, then select **Add to Project** from the context menu. If a confirmation dialog appears, click **Add Library**.





- 5 Repeat step 4 and add oracle.ugbu.ss.shared.api library to the project.
- 6 Save all.
- 7 Create a Java class (DemoManagedBean.java, sample code below) and extend **SSBaseManagedBean** class.



- 8 Use the following sample code to access the account details in the task flow.

**Note:** The following code sample assumes that the custom taskflow or page will default the `userId` to the logged in User. If you want to test the code without logging in, then override the user to a valid OUCSS User by calling `super.setWebUserId("<<valid_UserId>>")`; in the constructor of the `DemoManagedBean`.

```
package oracle.ugbu.ss.custom.view.backing;

import com.oracle.ugbu.ss.api.model.account.OUCSSAccount;
import com.oracle.ugbu.ss.api.model.account.OUCSSAccountList;
import com.oracle.ugbu.ss.api.model.security.OUCSSUser;
import com.oracle.ugbu.ss.shared.view.beans.SSBaseManagedBean;

public class DemoManagedBean
    extends SSBaseManagedBean
{
    @SuppressWarnings("compatibility")
    private static final long serialVersionUID = 1L;

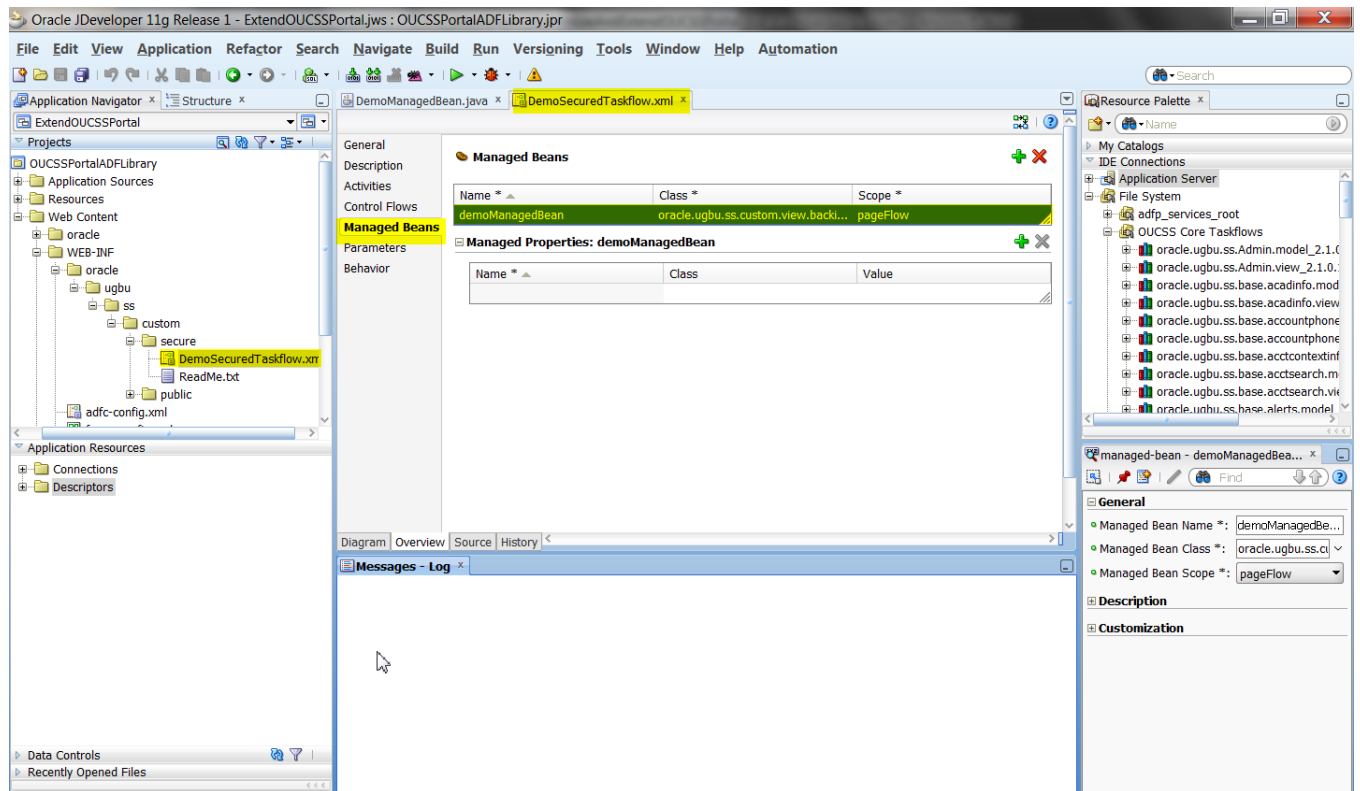
    public DemoManagedBean()
    {
        super();
        // Uncomment to Override the user for testing.
        //super.setWebUserId("WSSAdmin");
    }

    /**
     * Method to get details about the current logged in user.
     * @return
     */
    public OUCSSUser getUser()
    {
        return super.getContext().getCurrentUser();
    }

    /**
     * Method to get list of accounts enrolled to logged in User.
     * @return
     */
    public OUCSSAccountList getUserAccountList()
    {
        OUCSSAccountList accountList =
            getContext().getCurrentUser().getUserAccounts();
        return accountList;
    }

    /**
     * Method to get the currently selected account.
     * @return
     */
    public OUCSSAccount getCurrentAccount()
    {
        OUCSSAccount currentAccount =
            getContext().getCurrentUser().getCurrentUserAccount();
        return currentAccount;
    }
}
```

- 9 Declare the `DemoManagedBean` class as a managed bean in the taskflow definition. For the purposes of this example, the scope used is **pageFlowScope**.



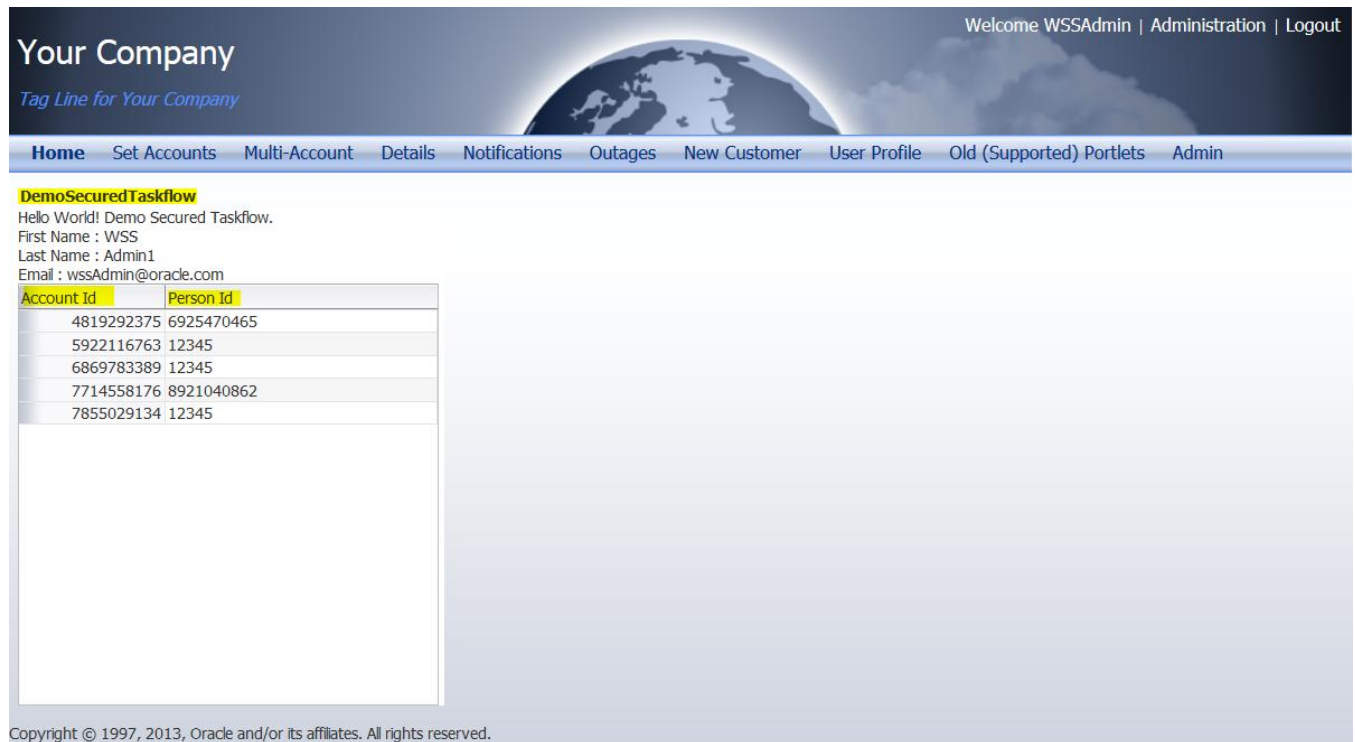
10 Update the demo.jsff to include user and account details by reference the managed bean methods.

11 Sample JSPX code:

```
<?xml version='1.0' encoding='UTF-8'?>
<jsp:root xmlns:jsp="http://java.sun.com/JSP/Page" version="2.1"
  xmlns:af="http://xmlns.oracle.com/adf/faces/rich"
  xmlns:f="http://java.sun.com/jsf/core">
  <af:panelBorderLayout id="pbl1">
    <f:facet name="top">
      <af:outputText value="Hello World! Demo Secured Taskflow." id="ot1"/>
    </f:facet>
    <af:panelGroupLayout layout="vertical" halign="start" id="pgl1">
      <af:outputText value="First Name : #{pageFlowScope.demoManagedBean.user.firstName}"
        id="ot4"/>
      <af:outputText value="Last Name : #{pageFlowScope.demoManagedBean.user.lastName}"
        id="ot5"/>
      <af:outputText value="Email : #{pageFlowScope.demoManagedBean.user.emailAddress}"
        id="ot6"/>
      <af:table value="#{pageFlowScope.demoManagedBean.userAccountList}"
        var="row" id="t1" contentDelivery="immediate"
        columnStretching="last" rowSelection="none"
        summary="Account List" columnSelection="none"
        rowBandingInterval="1" shortDesc="Account List">
        <af:column headerText="Account Id" id="c1" rowHeader="true">
          <af:outputText value="#{row.key1}" id="ot2"/>
        </af:column>
        <af:column headerText="Person Id" id="c2">
          <af:outputText value="#{row.key2}" id="ot3"/>
        </af:column>
      </af:table>
    </af:panelGroupLayout>
  </af:panelBorderLayout>
</jsp:root>
```



- 12 Run/Deploy the extension again and consume the taskflow in any page. The sample code in step 10 produces the following result:



**Your Company**  
Tag Line for Your Company

Welcome WSSAdmin | Administration | Logout

Home Set Accounts Multi-Account Details Notifications Outages New Customer User Profile Old (Supported) Portlets Admin

**DemoSecuredTaskflow**  
Hello World! Demo Secured Taskflow.  
First Name : WSS  
Last Name : Admin1  
Email : wssAdmin@oracle.com

Account Id	Person Id
4819292375	6925470465
5922116763	12345
6869783389	12345
7714558176	8921040862
7855029134	12345

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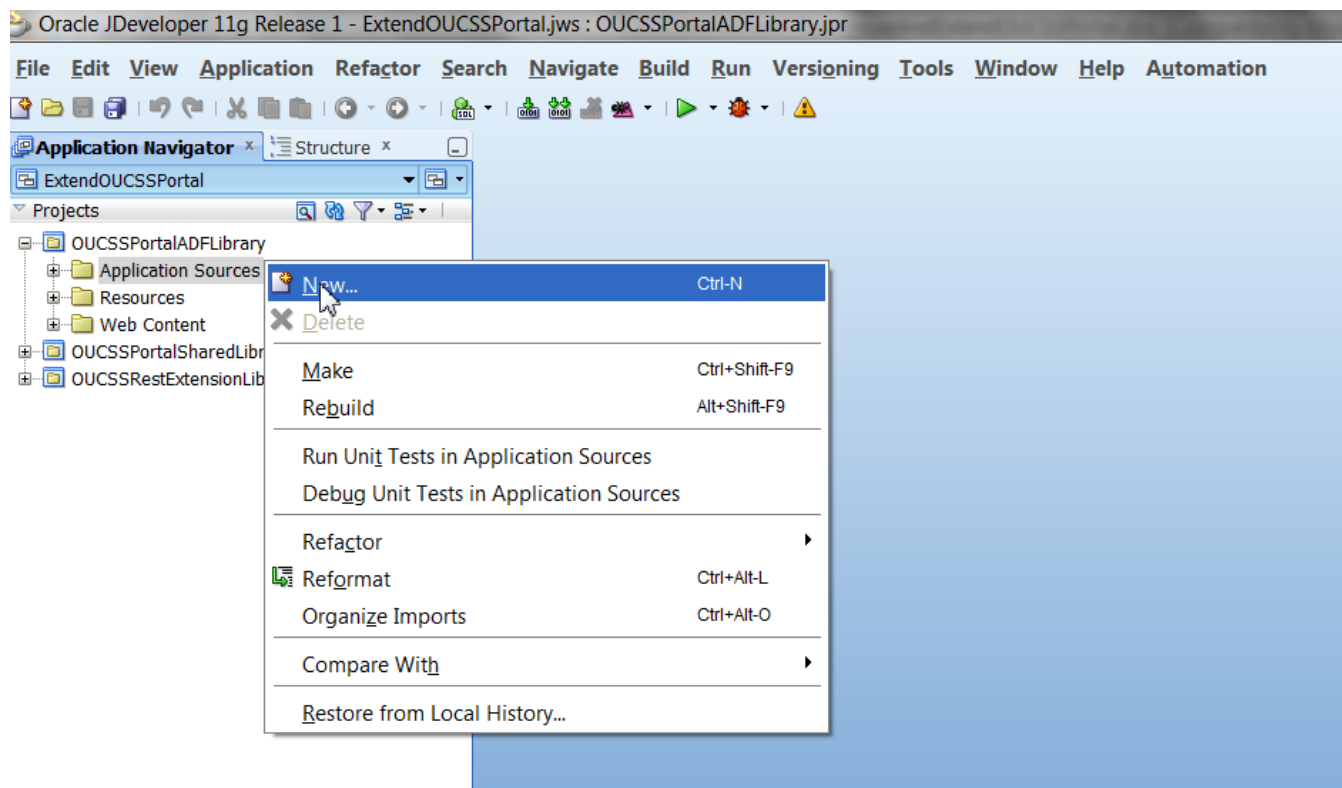
- 13 Review the following:

- [Configure the Resource Catalog](#) section of this document to consume the taskflows in OUCSS Portal.
- [Access Pages from Extend OUCSS Portal](#) section of this document to access page in OUCSS Portal.

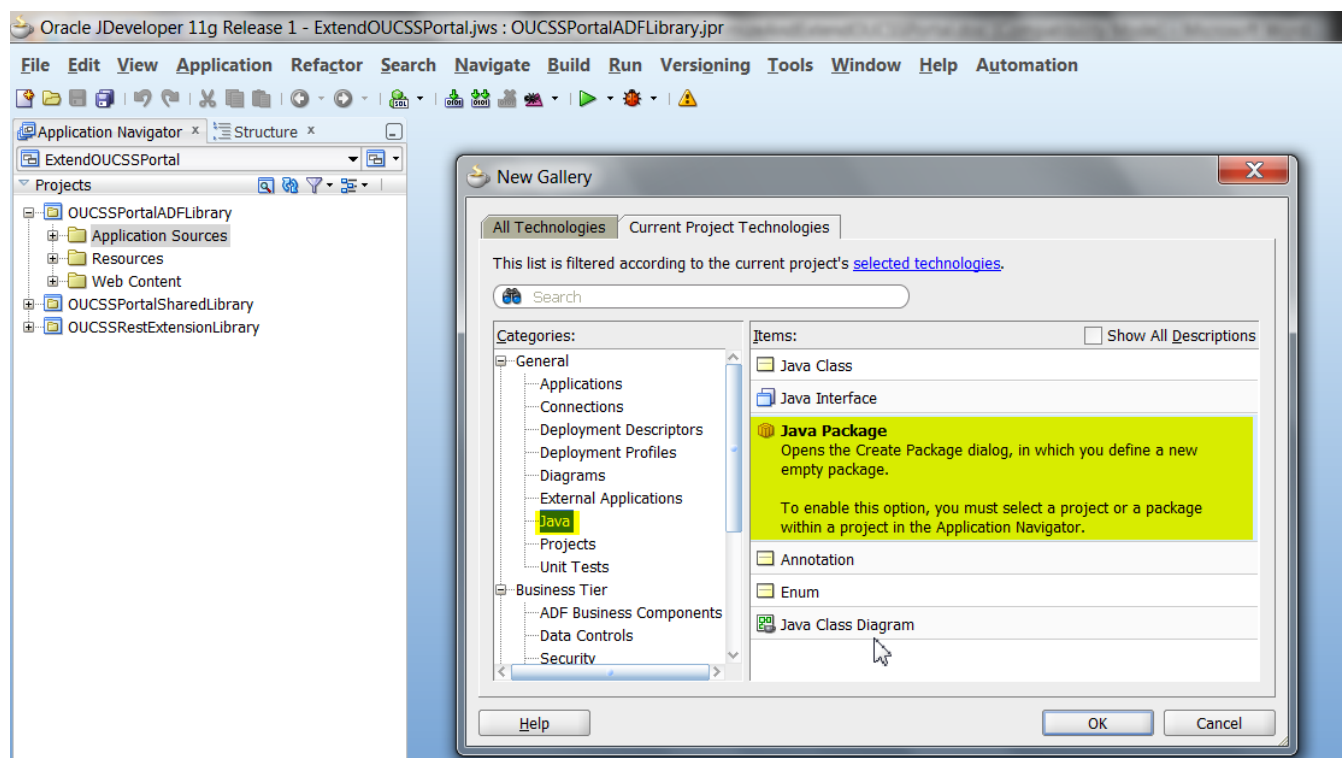
## Adding Support for a New Language

OUCSS Portal by default is configured only to support English. In order to translate navigation links and page titles in OUCSS Portal, Portal bundles for the additional bundles are required to be created. In order to add a Portal Bundle for your supported language(s),

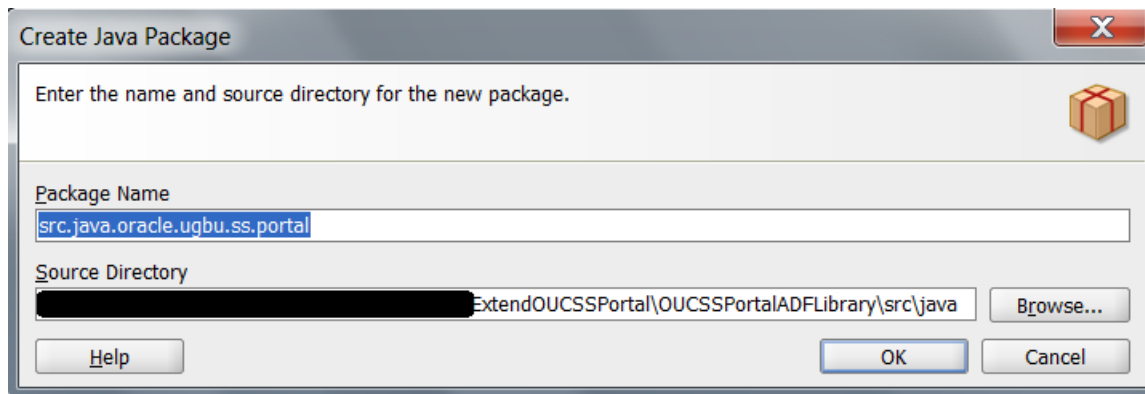
- 1 Create a new package in the Application Sources under the project OUCSSPortalADFLibrary. Right click on the 'Application Sources' directory and select 'New' from the pop-up menu.



- 2 Select Java under 'General' categories in the left panel. Select 'Java Package' in the right panel. Click 'Ok'.



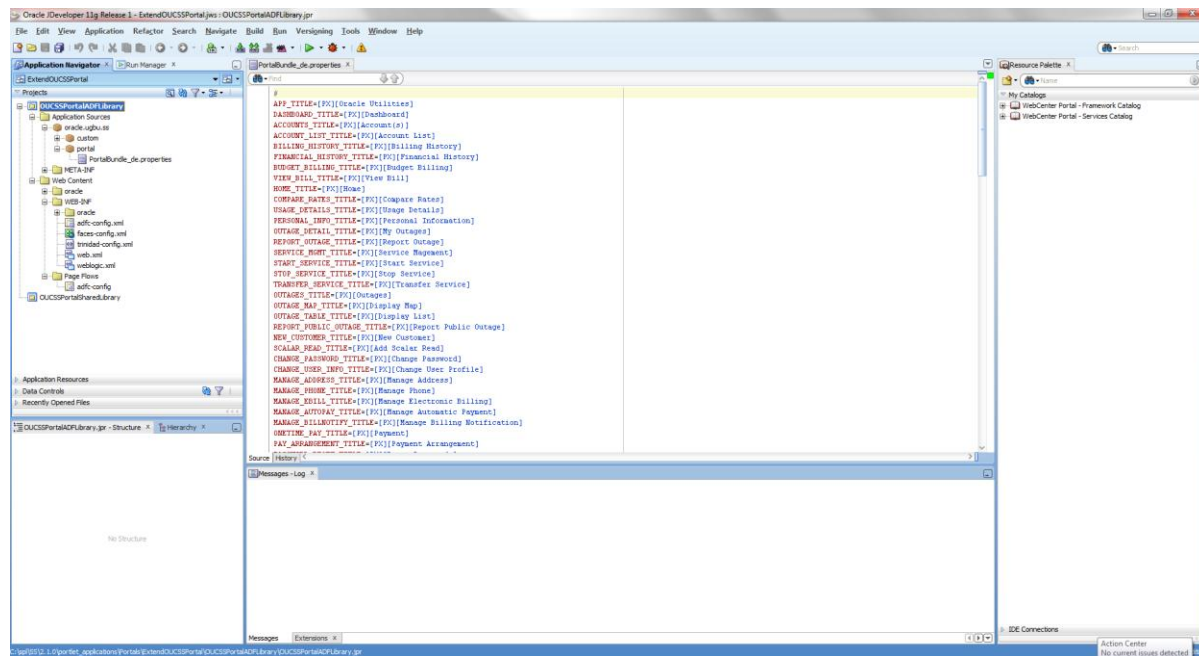
- 3 Mention 'Package Name' as 'src.java.oracle.ugbu.ss.portal' (without quotes) and click Ok.



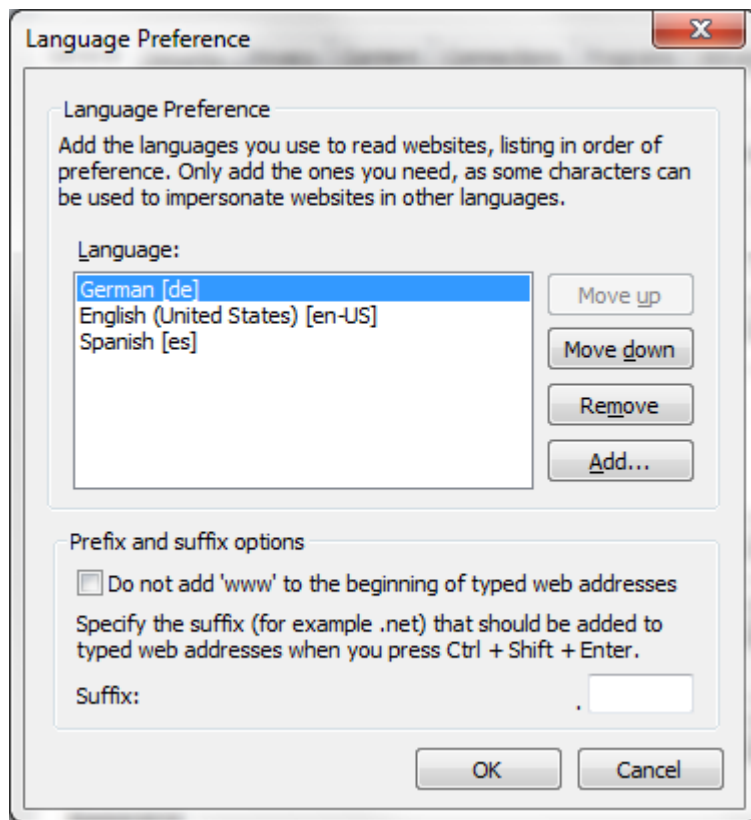
- 4 Create a new resource bundle with appropriate locale with name format `PortalBundle_<<locale>>.properties` under the package created in step 3. Create separate bundle for many each supported locale required by implementation.

For example, for German, create a resource bundle with name 'PortalBundle\_de.properties'.

Please see [Appendix-A](#) for properties to be added to the Portal Bundle.



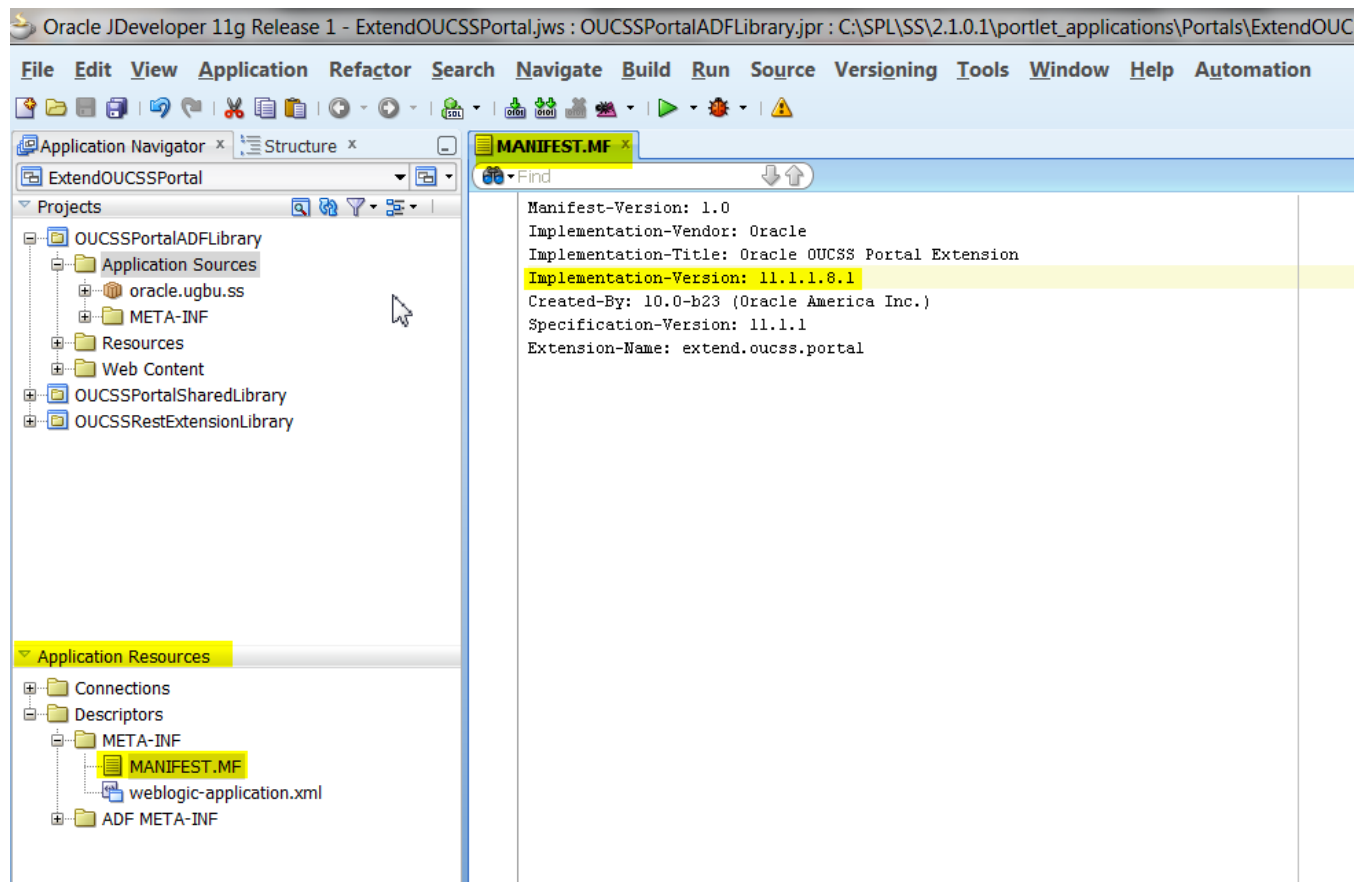
- 5 Please follow the section [“Deploying the extend.ouc.ss.portal as Shared Library”](#) for details regarding how to deploy the extension. The added bundles will load after restart.
- 6 Set the browser language to appropriate locale before accessing the portal to see the translated labels.



## Deploying the extend.oucss.portal as Shared Library

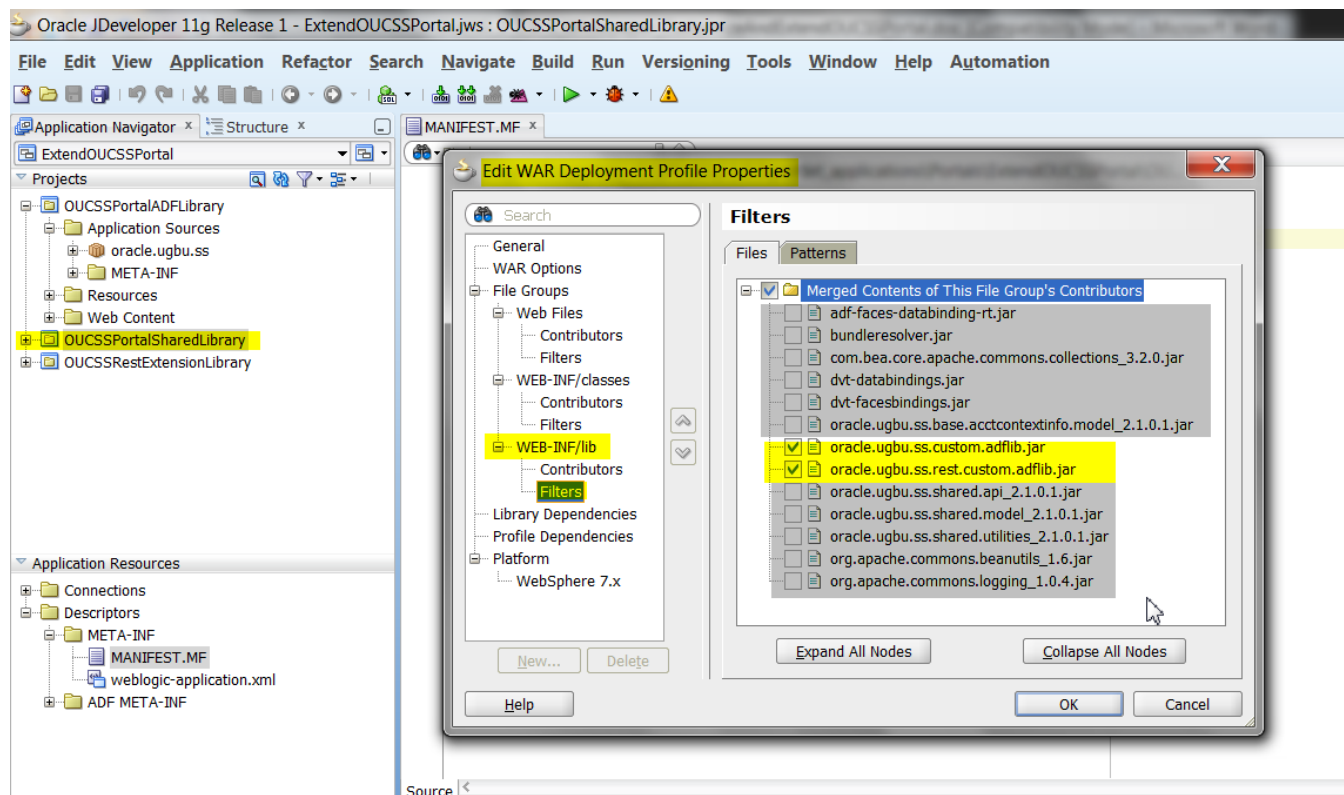
- 1 Modify the implementation version number in the MANIFEST.MF file in the **OUCSSPortalExtension** shared library (<<Application\_Home>>/src/META-INF/MANIFEST.MF) before redeploying.

**Note:** The default implementation version number is 11.1.1.8.0. You can increment the major or minor version for every new revision deployed. For the purposes of this demo, the new implementation version number will be incremented to 11.1.1.8.1.

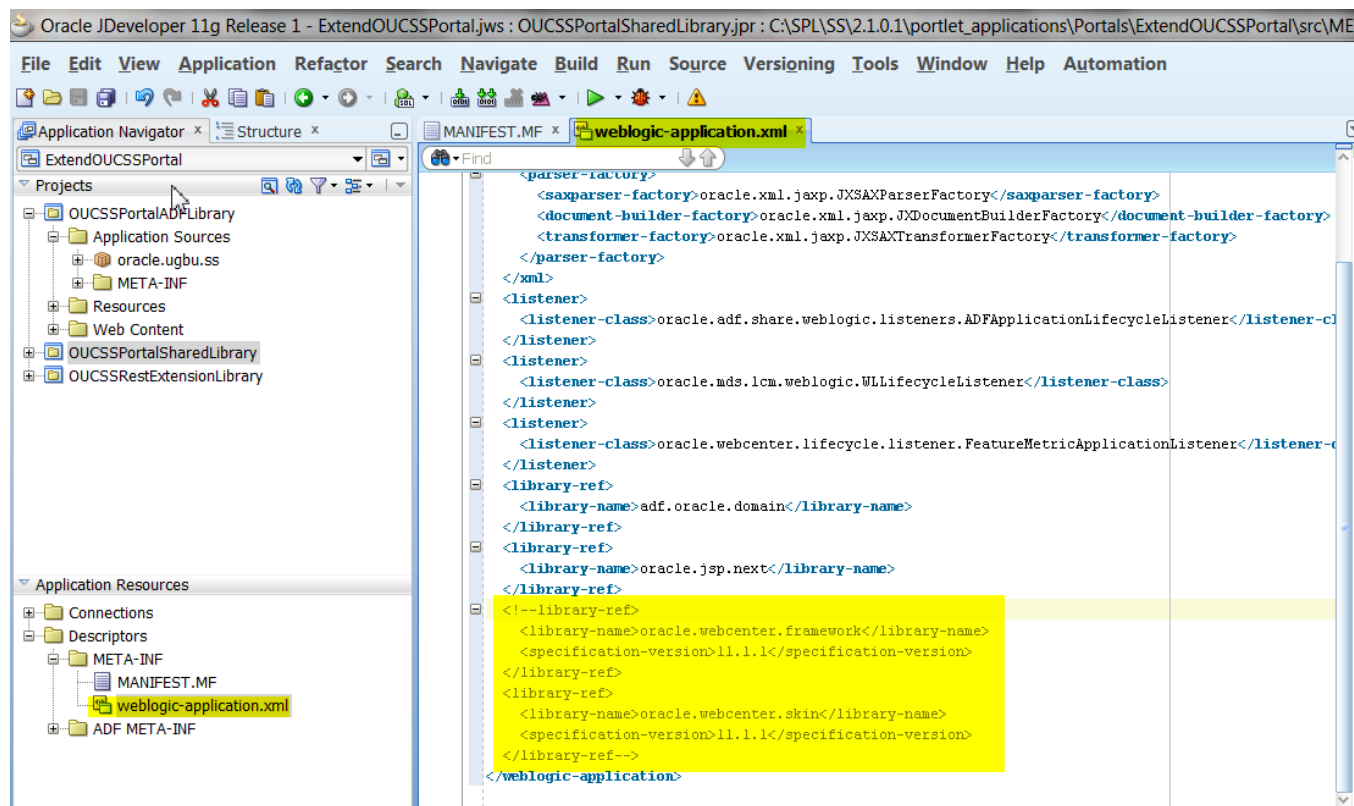


- 2 Edit the OUCSSPortalSharedLibrary project properties. Select Deployments and then edit the OUCSSPortalSharedLibrary deployment profile. Review the library references of the profile. Uncheck all jars references except “**oracle.ugbu.ss.custom.adflib.jar**” and “**oracle.ugbu.ss.custom.rest.adflib.jar**”.

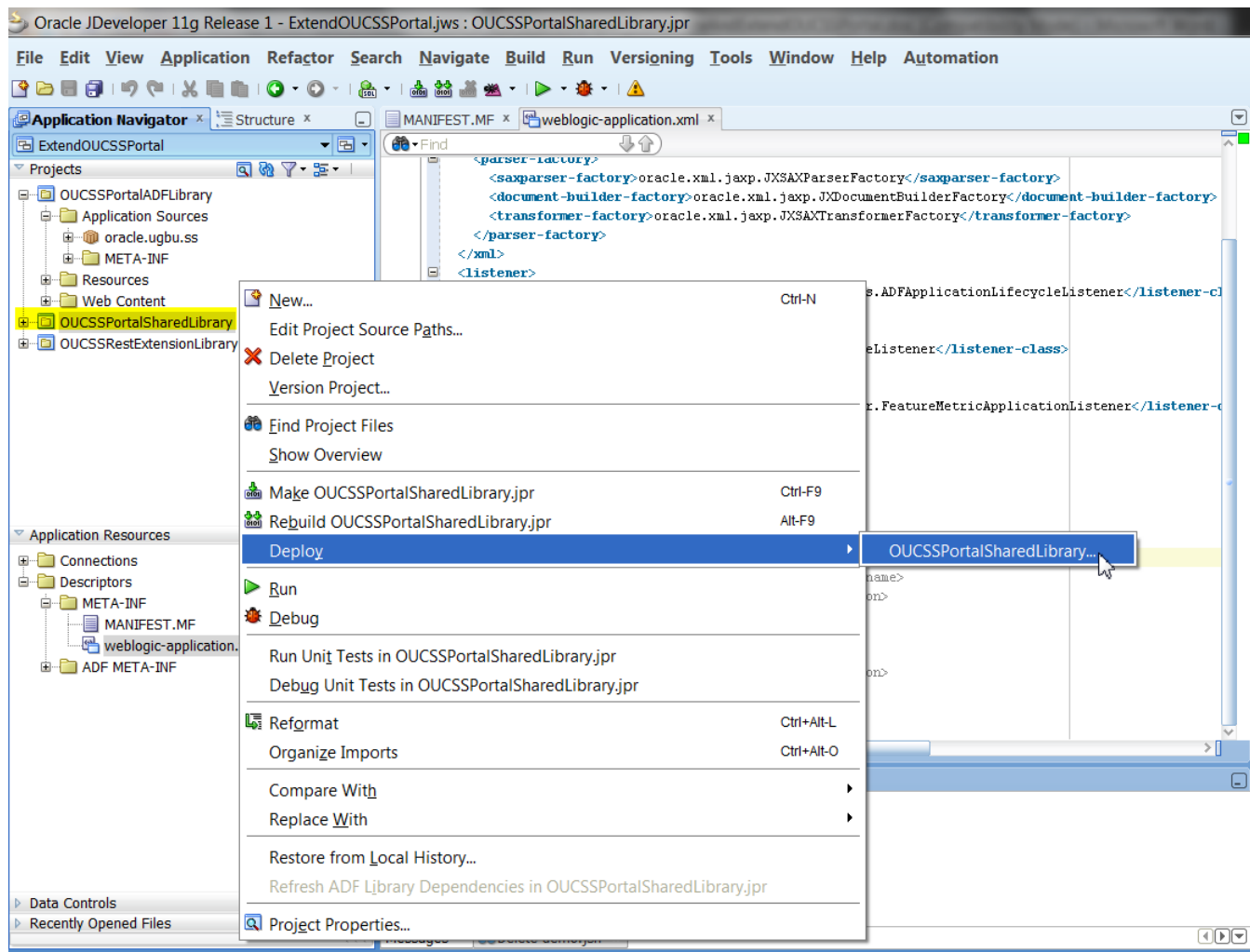
**Note:** It is important to remove any references of other jars from extension library. If not removed, then additional copies of these jars will be loaded at runtime which will affect application of patch and upgrades and cause issues.



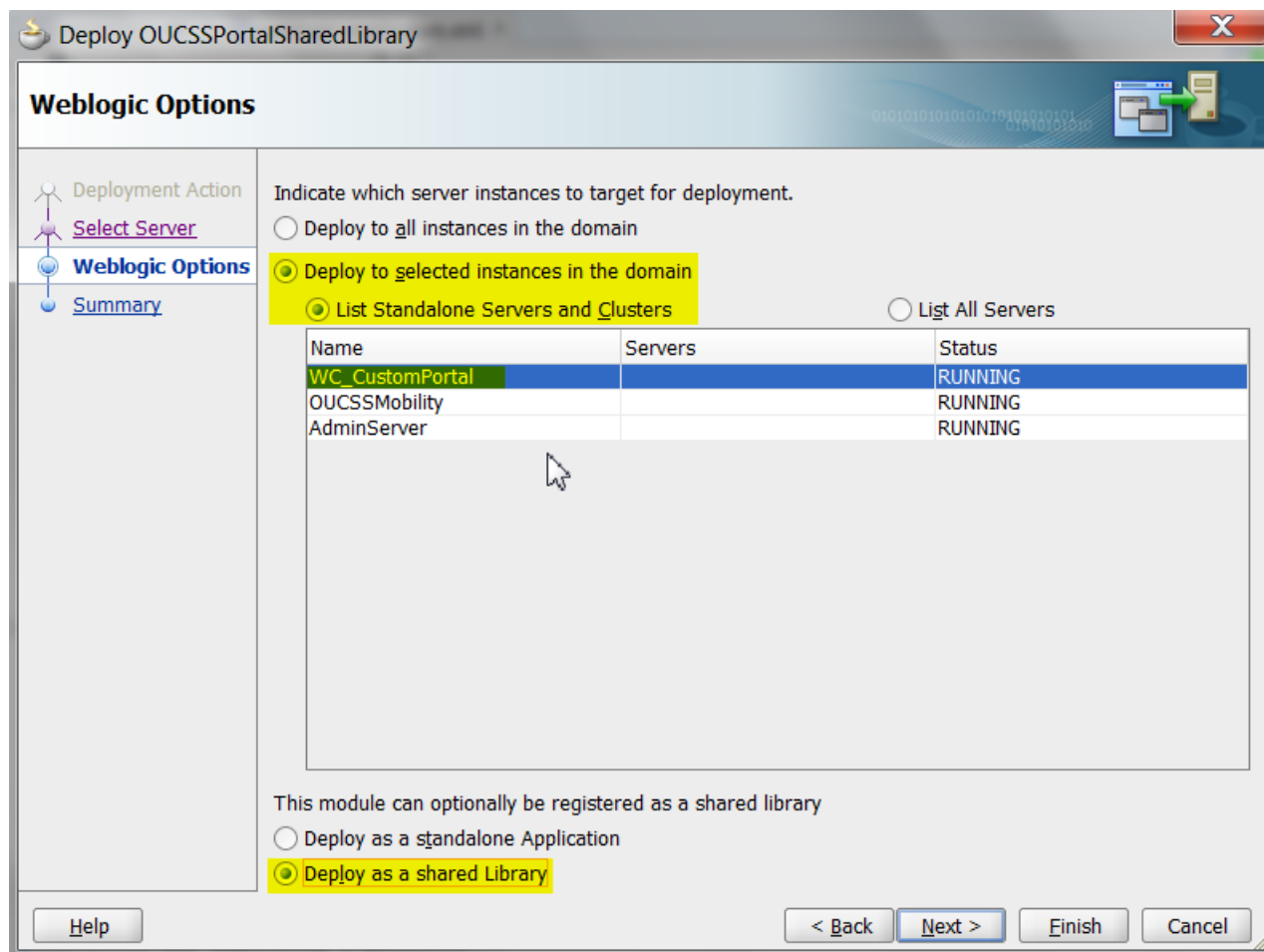
- 3 Make weblogic-application.xml and make sure that library-name oracle.webcenter.framework and oracle.webcenter.skin are commented and not active. Remove if these entries gets added by JDev.



- 4 Deploy the OUCSS Portal Extension Shared Library to consume the taskflow in the portal. To deploy, right-click on the **OUCSSPortalSharedLibrary** project and select the **OUCSSPortalSharedLibrary** deployment profile to redeploy the extension to the same managed server as the OUCSS Portal application.



- 5 Make sure to choose the option to deploy the war as Shared Library



- 6 Check **Deployments** in the WebLogic Console to verify that the deployment was successful and the library is Active.

<input type="checkbox"/>	extend.oucss.portal(11.1.1.1,11.1.1.8.0)	Active	Library	512
<input type="checkbox"/>	extend.oucss.portal(11.1.1.1,11.1.1.8.1)	Active	Library	100

- 7 The custom managed server must be restarted for the newly-created taskflows and pages to be consumed in the OUCSS Portal.

## Portal Rebranding

In order to rebrand the portal, implementation will

- 1 Customizing the Page Template
- 2 Customizing the Navigation Model
- 3 Customizing the Resource Catalog.



# Customizing the Page Template

The default OUCSS Portal contains the out-of-box page templates Global and Swooshy, as provided by the Oracle WebCenter Framework Application template. The default page templates can be replaced by

- 1 Customizing the existing page templates
- 2 Creating a brand new page template.
- 3 Importing new page templates exported from another instance or JDeveloper.

For more information on default and page template customization, see

[http://docs.oracle.com/cd/E29542\\_01/webcenter.1111/e27739/jpsdg\\_pagetemp.htm#BEHDIBBE](http://docs.oracle.com/cd/E29542_01/webcenter.1111/e27739/jpsdg_pagetemp.htm#BEHDIBBE)

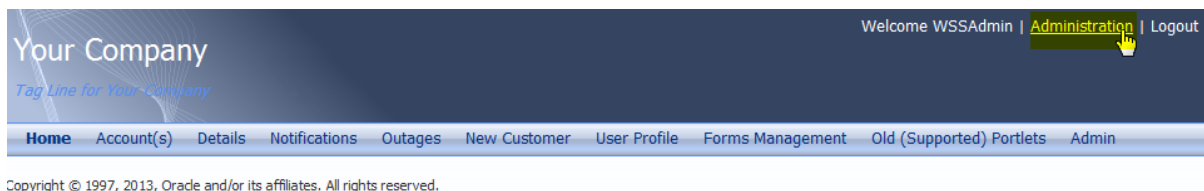
## Customize Existing Page Template

The following steps describe how to customize the Swooshy page template that exists on a deployed OUCSS Portal.

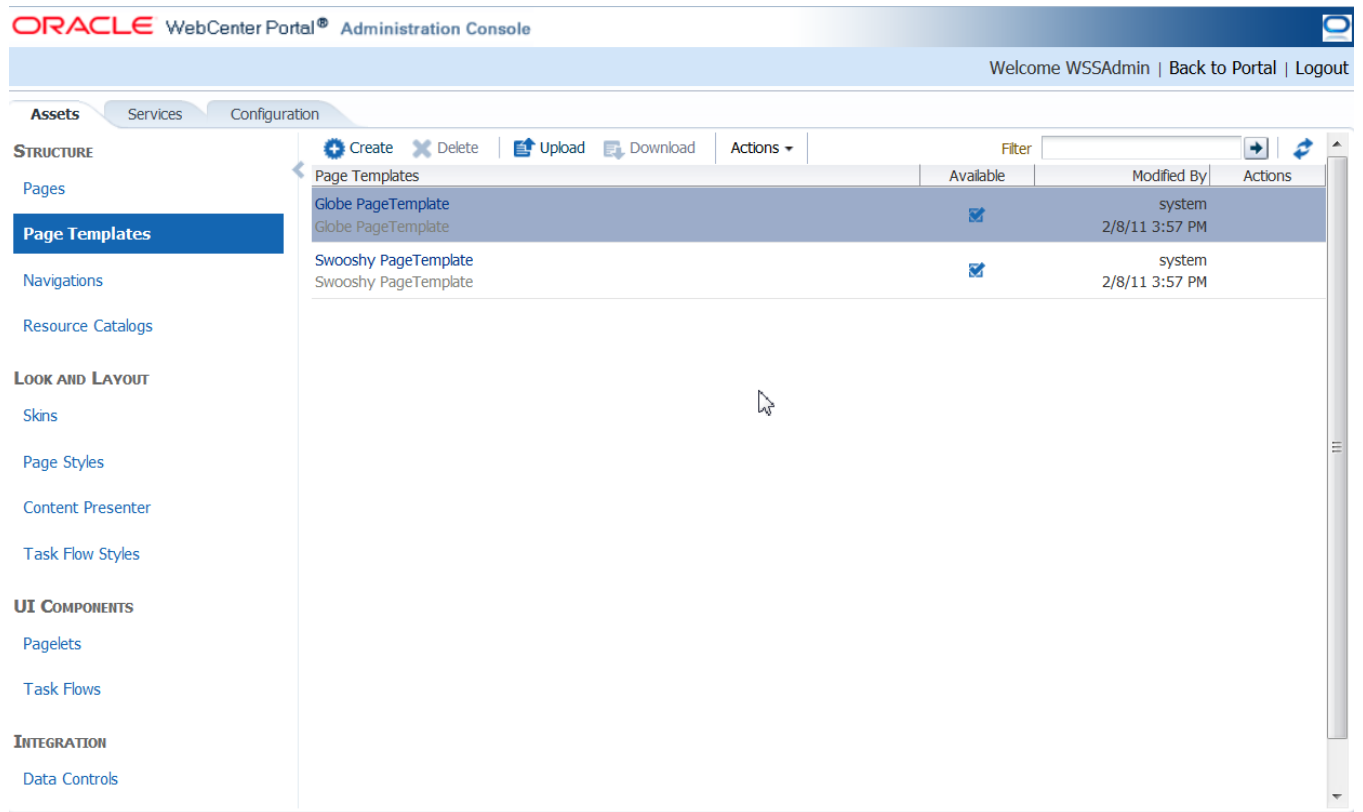
- 1 Log in to the OUCSS Portal with Administrator permission (WSSAdmin use is seeded with the required permission).



- 2 Click on the **Administration** link on the top-right section of the screen.

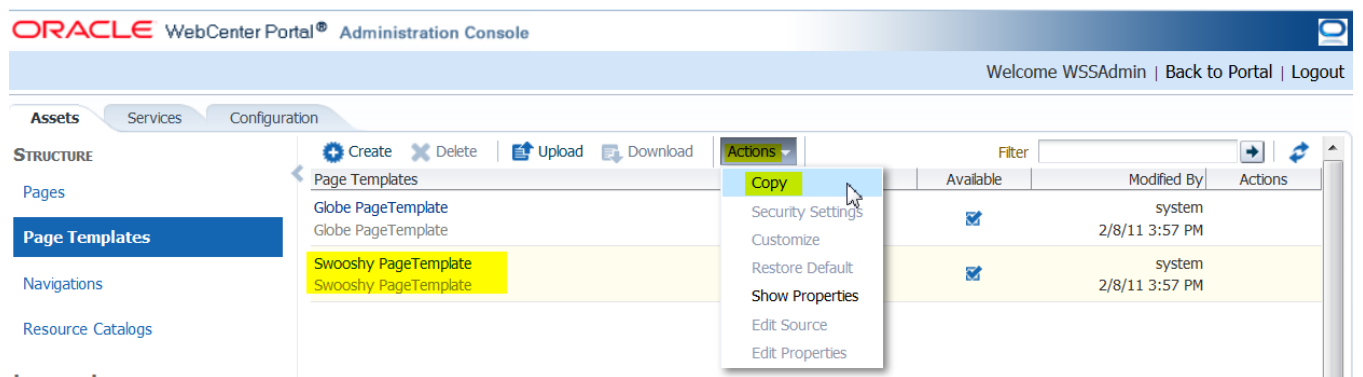


- 3 In the Administration console, click the **Resources** tab, then choose **Page Templates** in the **Structure** section:

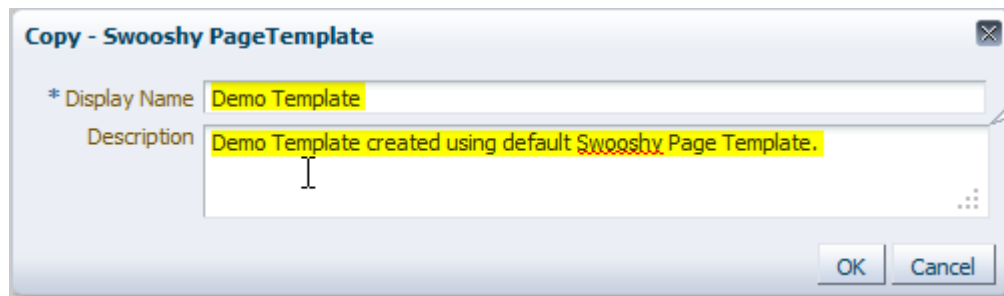


- 4 The Swooshy Page Template is read-only and already seeded. To customize it, make a copy of the Existing Swooshy Page Template. To make a copy:

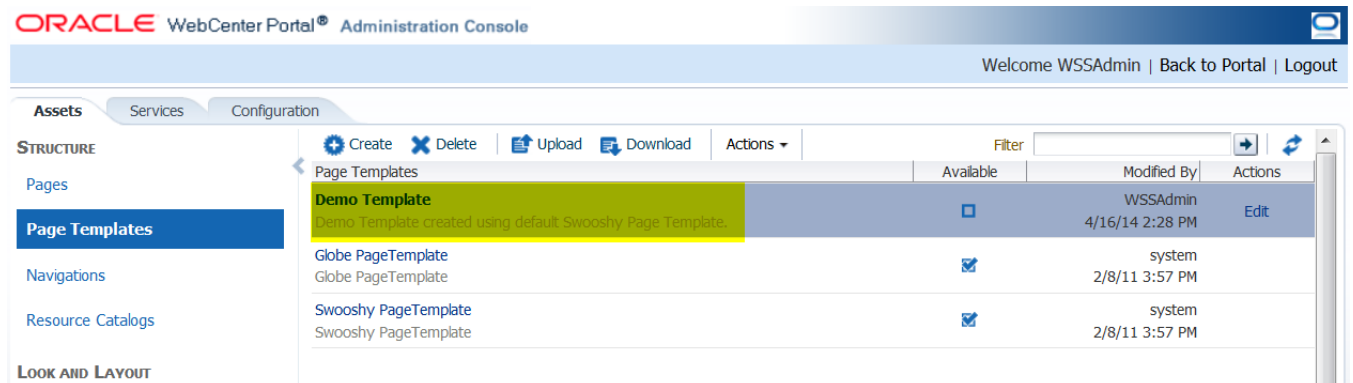
- A Select the Swooshy Page Template from the list of Page Templates.
- B Click the **Edit** menu and select **Copy**.



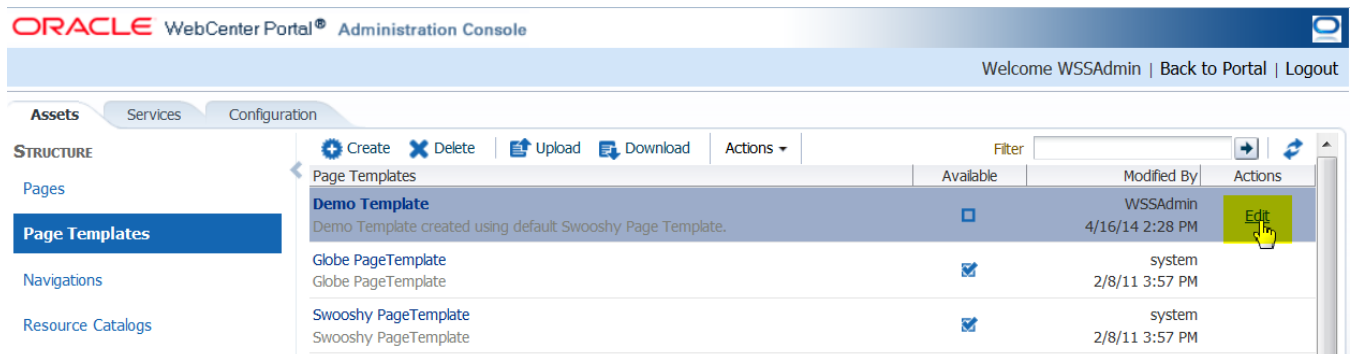
- C Enter a name and description for the new template:



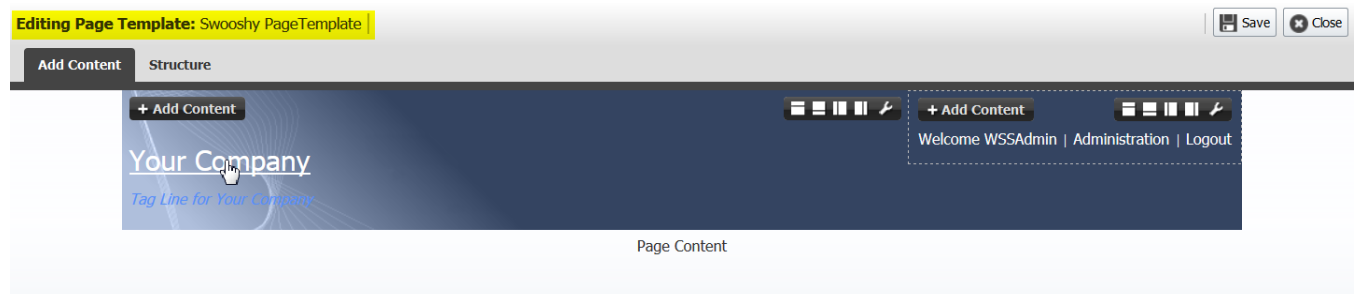
- D Click **OK** to create the new template.



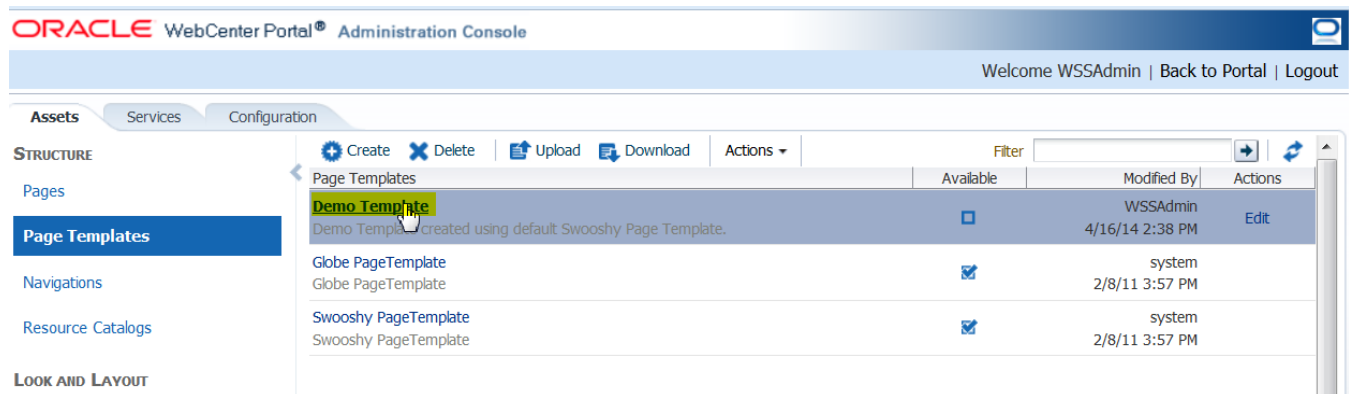
- 5 Select the new template, then click the **Edit** menu and choose **Edit** to open the template for customization.



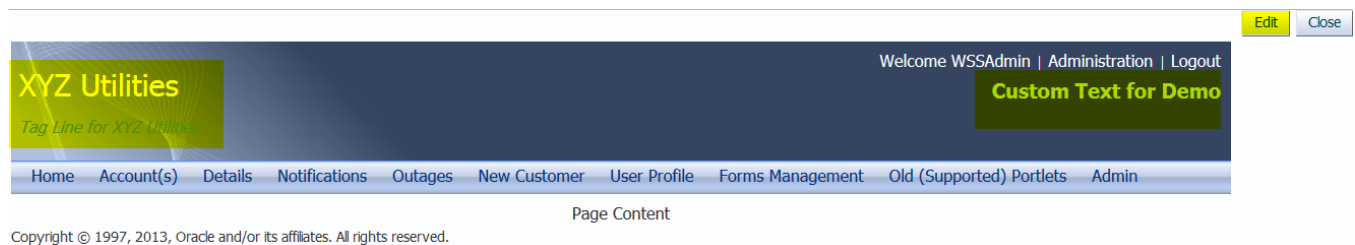
### Swooshy Page Template in Edit Mode



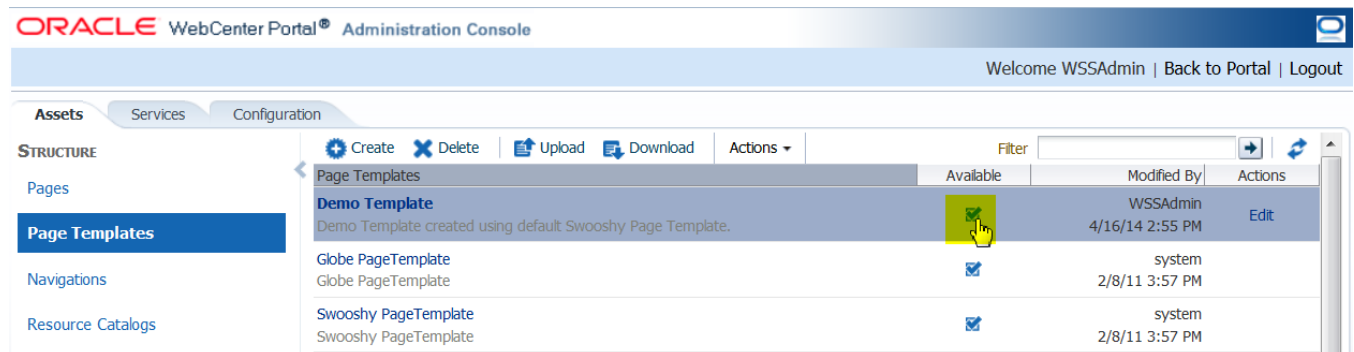
- 6 Customize as required, and then click **Save**, then **Close**.
- 7 Click on the Template Name to preview the changes.



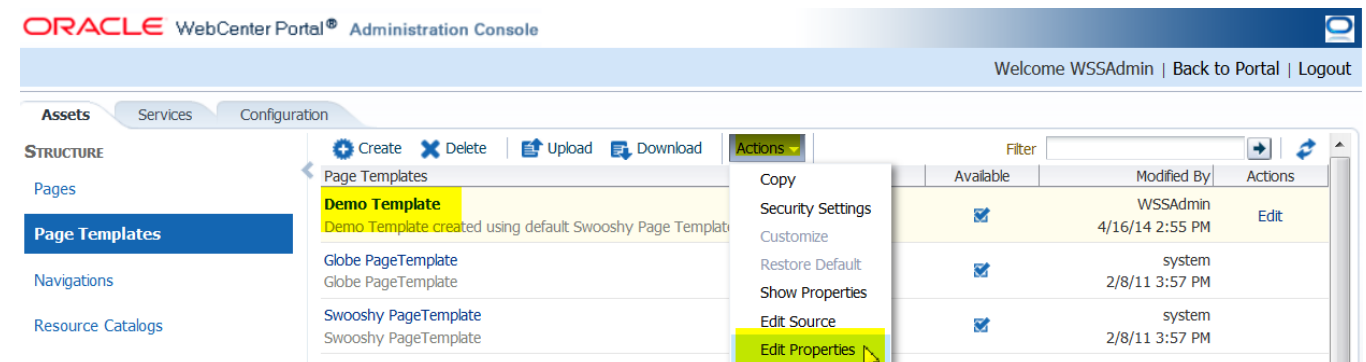
- 8 If not satisfied, click **Edit** and modify the template. When complete, click Save and **Close**.



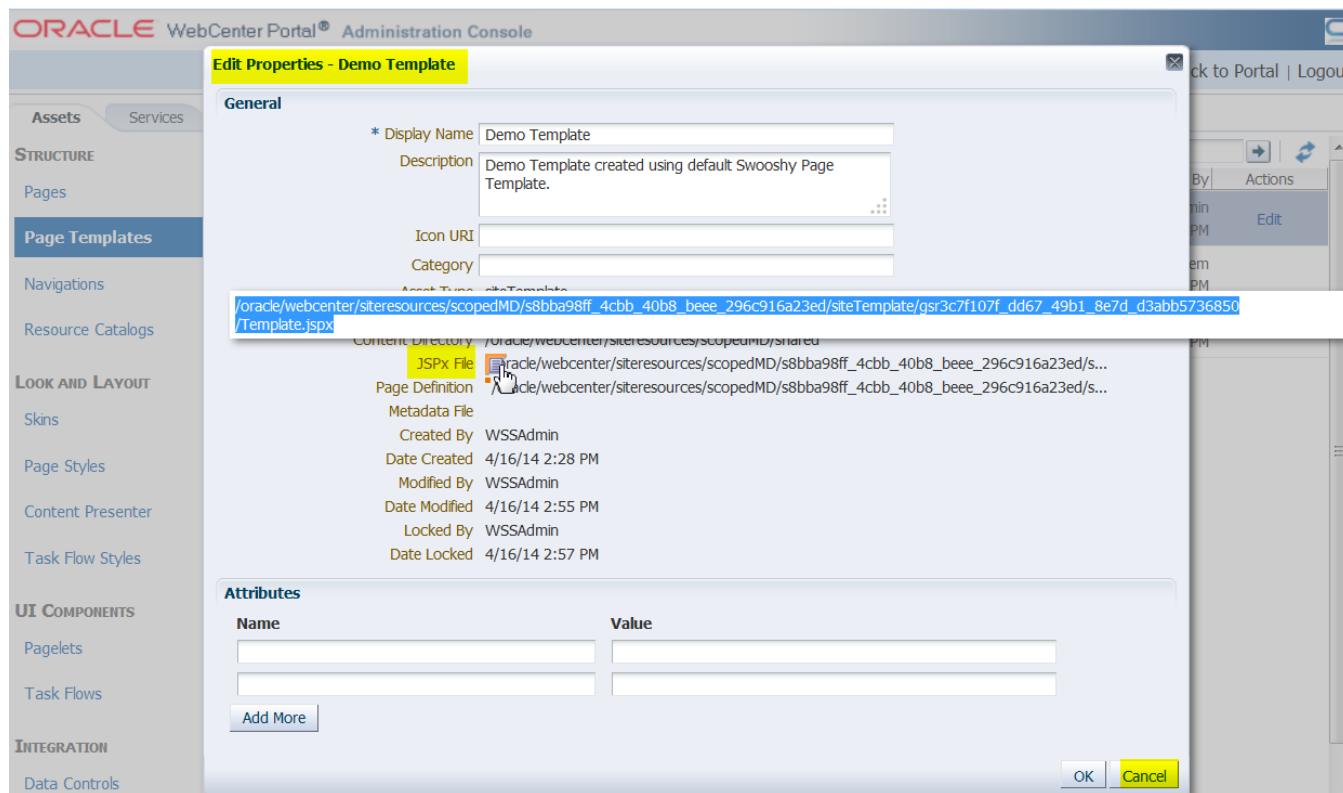
- 9 The newly created templates are hidden by default. To unhide the template, check the Available checkbox.



- 10 To activate and use the new Demo Template as the site template for one or more Context, copy the template path of the new template. Click **Action > Edit Properties**.



- 11 Select the "JSPx File" and copy the path. Click Cancel to close the popup.





**12** Click the **Back to Portal** link and goto **Admin > Resources** page.

**13** Filter the resources with resource codes **PORTAL\_ST\_**. Update the “URL Override” property by selecting **PORTAL\_ST\_<<Context>>** (RESIDENTIAL, PUBLIC etc) resource with the JSPx path copied in Step 10.

Welcome WSSAdmin | Administration | Logout

Your Company  
Tag Line for Your Company

Home Account(s) Details Notifications Outages New Customer User Profile Forms Management Old (Supported) Portlets Admin

Actions  

Resource Code	Resource Type	Locator Type	URL	URL Override
PORTAL_ST_COMMERCIAL	WXURL	WXREL	/oracle/webcenter/portalapp/pagetemplates/pageTemplate_globe.j	
PORTAL_ST_PUBLIC	WXURL	WXREL	/oracle/webcenter/portalapp/pagetemplates/pageTemplate_swoos	
PORTAL_ST_RESIDENTIAL	WXURL	WXREL	/oracle/webcenter/portalapp/pagetemplates/pageTemplate_swoos	

**Resource**

Resource Code: PORTAL\_ST\_RESIDENTIAL

Resource Type:

Locator Type:

URL:

URL Override:

Description:

Description Override:

Reset Save Cancel

Help Help Override

- 14 Repeat the same process to update other Context with custom Site template.
- 15 Restart the OUCSS Portal managed server and verify that changes are reflected.

Welcome WSSAdmin | Administration | Logout

XYZ Utilities  
Tag Line for XYZ Utilities

Custom Text for Demo

Home Account(s) Details Notifications Outages New Customer User Profile Forms Management Old (Supported) Portlets Admin

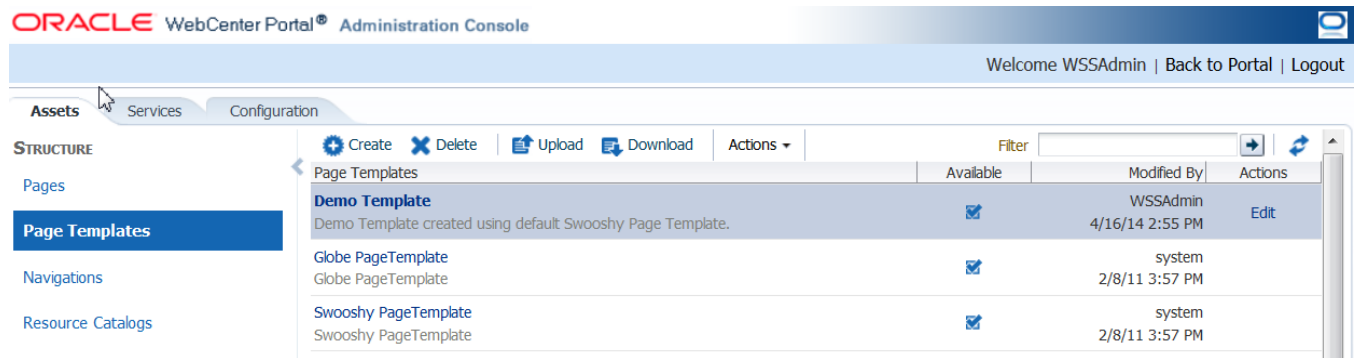
Copyright © 1997, 2013, Oracle and/or its affiliates. All rights reserved.

## Exporting an Existing Page Template

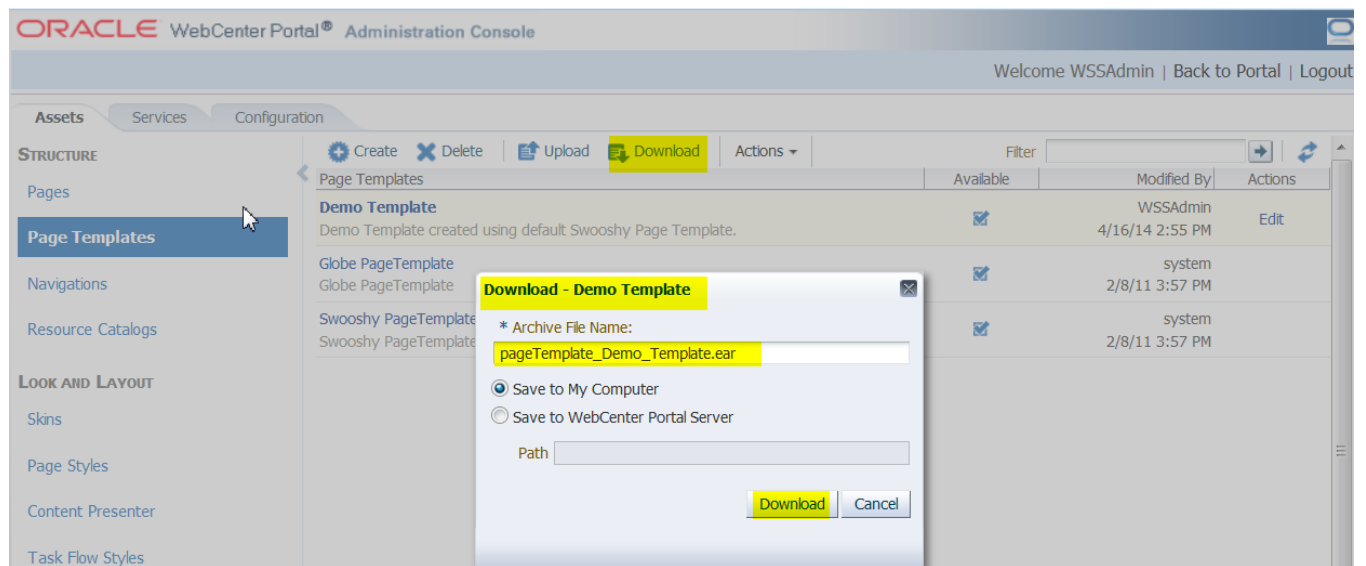
Page templates from other WebCenter portal instances, or from JDeveloper, can be imported into the OUCSS Portal for quick rebranding.

To export an existing template:

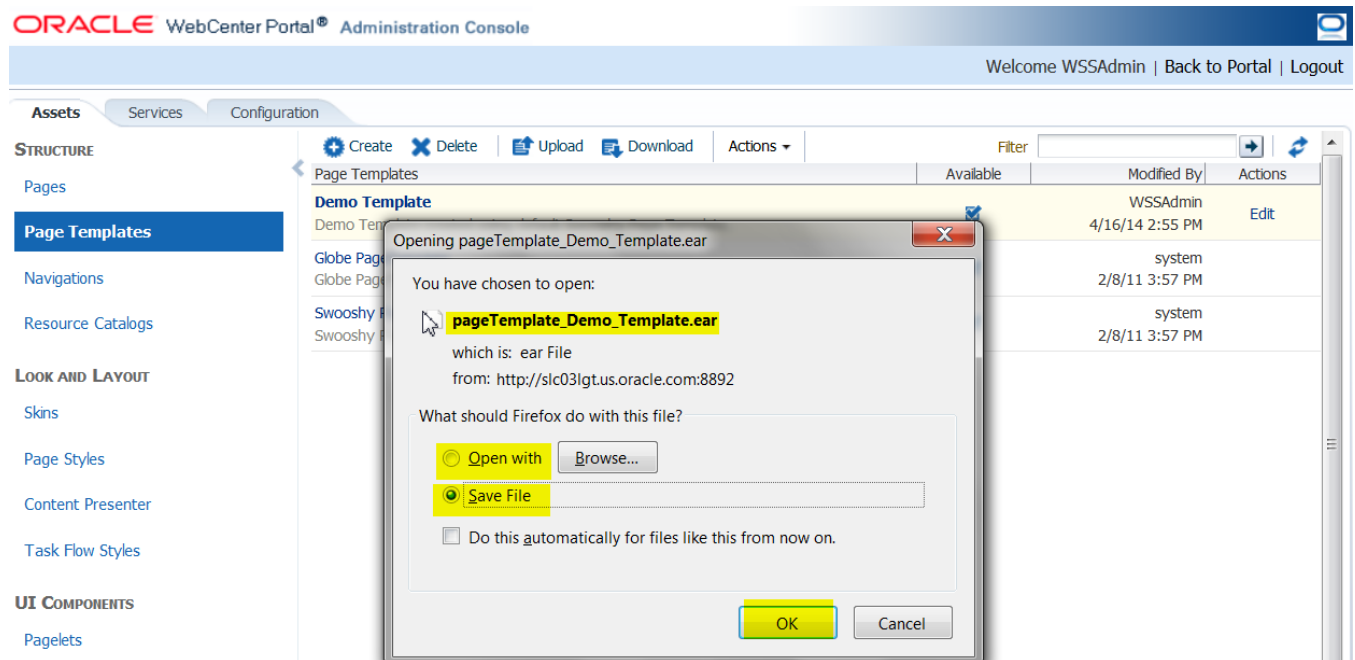
- 1 Log in to the instance of the existing page template with Administrator privileges, and then click on the **Administration** link to launch the Administration Console.
- 2 Choose the **Resources** tab, and then click on the **Page Templates** link in the **Structure** section. Select the template to be migrated.



- 3 Click **Download** on the toolbar to open the Download dialog.
- 4 Enter the Archive File Name, choose the location for the exported archive on your local machine, and then click **Download**.

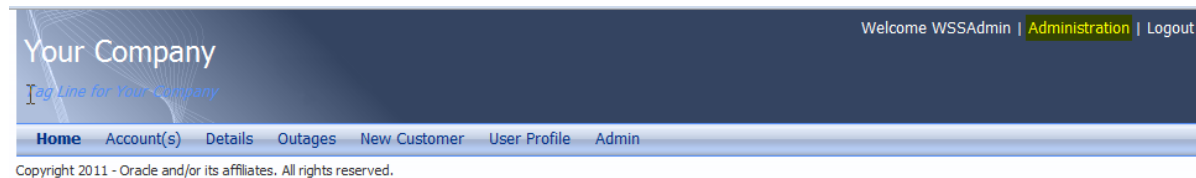


- 5 In the **Opening** dialog, choose **Save File** to save the exported template, then click **OK**.

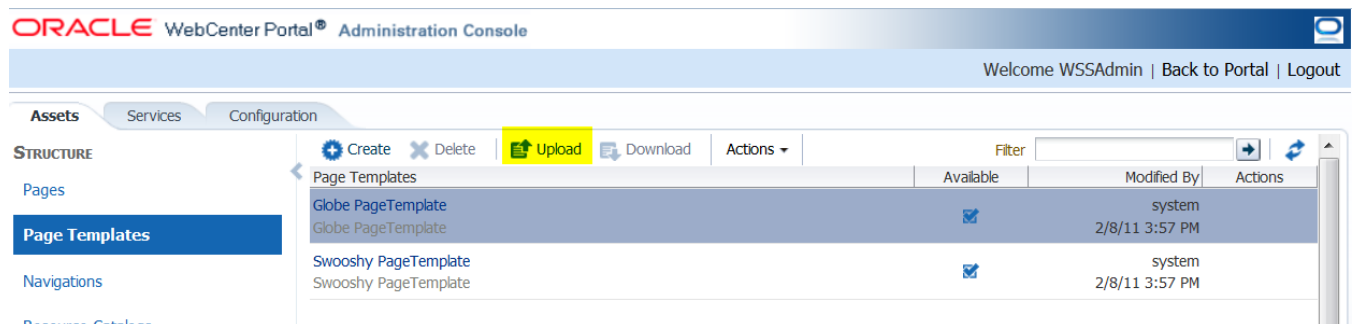


## Importing a Page Template

- 1 Log in to the portal instance with Administrator privileges in the location in which the template is to be migrated/imported.

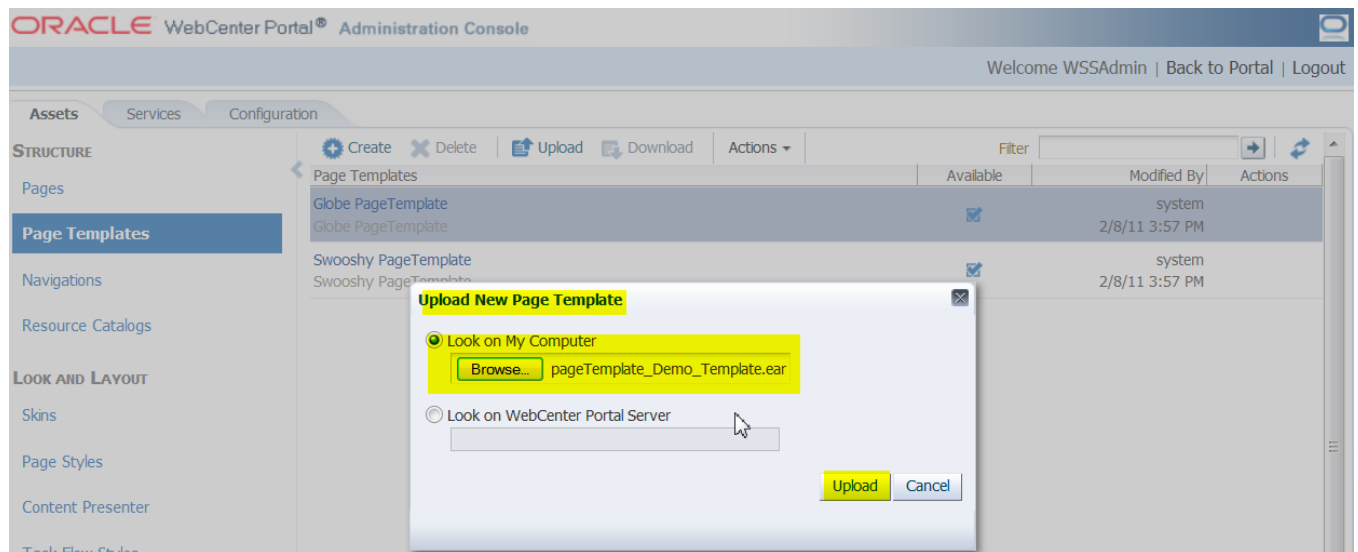


- 2 Click Administration and go to the Resources > Page Templates page.
- 3 Click Upload.

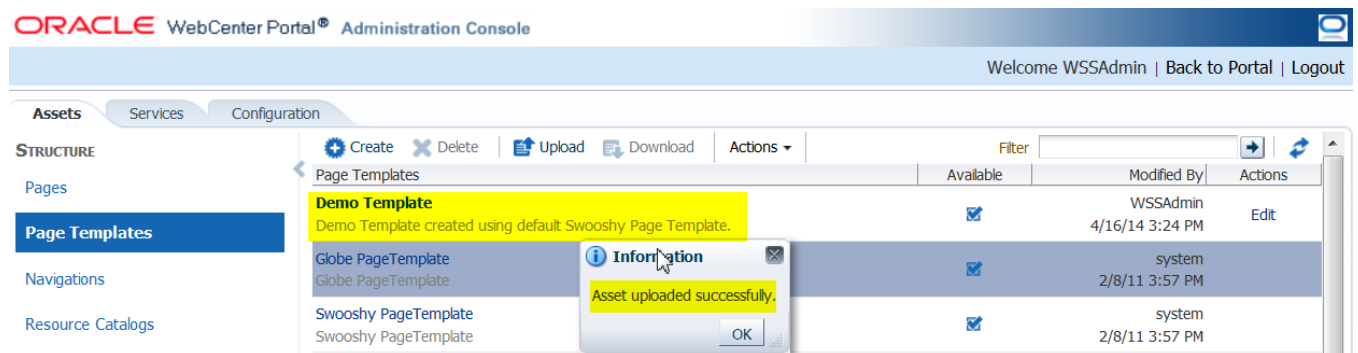


- 4 Select the **pageTemplate\_Demo\_Template.ear** or **Page Template** export archive that was downloaded from the previous portal instance, and then click **Upload**.





- 5 Click **OK** to confirm. The newly-uploaded **Page Template** should be visible on the list.



- 6 To configure the page template, follow steps 10 to 15 from section “[Customizing and Configuring an Existing Page Template](#)” of this document.

## Customizing the Navigation Model

One of the primary activities in rebranding the portal is to customize the navigation model. This procedure involves adding new links and/or deleting or renaming existing links. If the OTB navigation model requires many changes, then a new navigation model can also be created from scratch using JDeveloper. The new navigation model is exported from JDeveloper and imported into Portal instance.

For additional information on customizing the navigation model, see

[http://docs.oracle.com/cd/E29542\\_01/webcenter.1111/e27739/jpsdg\\_navigation.htm#BABJHFCE](http://docs.oracle.com/cd/E29542_01/webcenter.1111/e27739/jpsdg_navigation.htm#BABJHFCE)

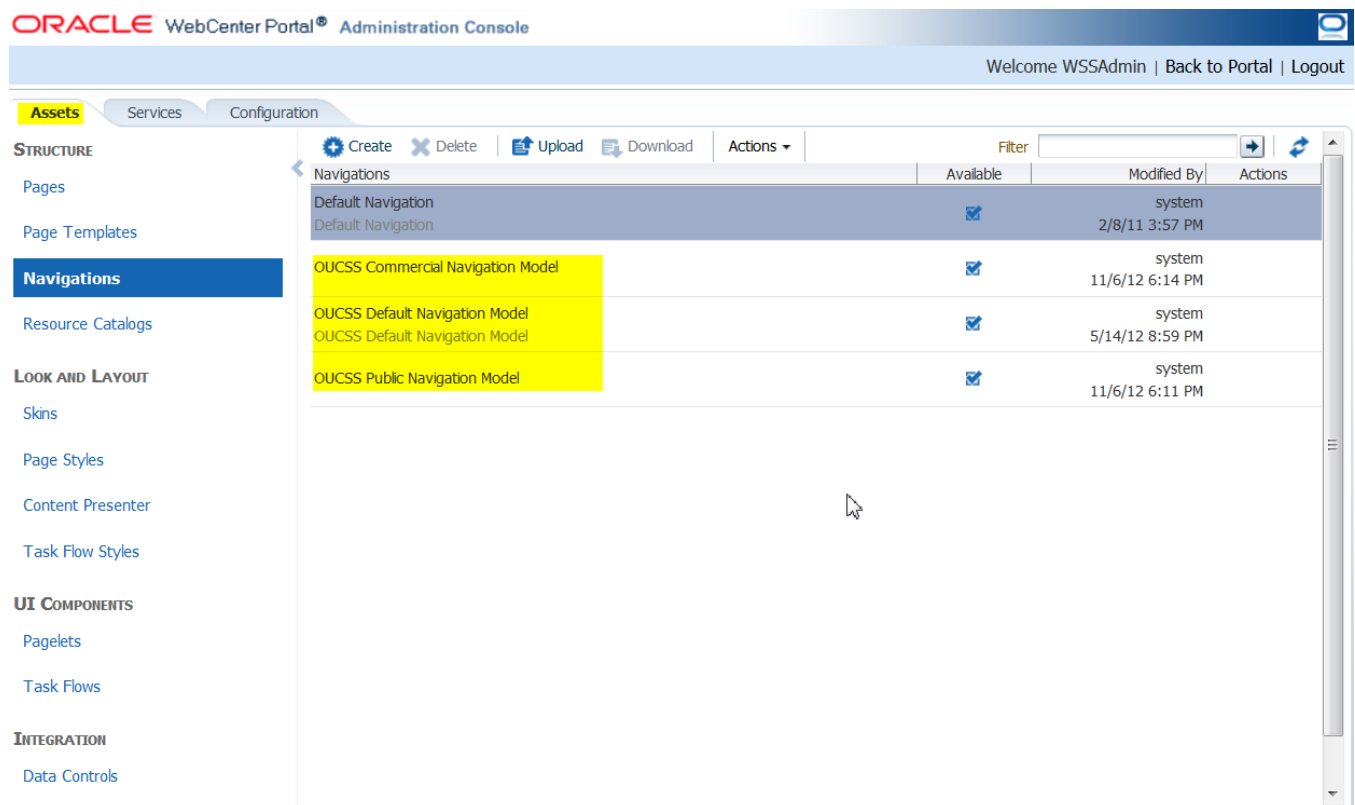
## Customizing and Configuring an OTB Navigation Model

The default OUCSS Portal is configured with 3 different navigation models. These navigation models are seeded and read-only. To customize it, a copy of this navigation model must be created.

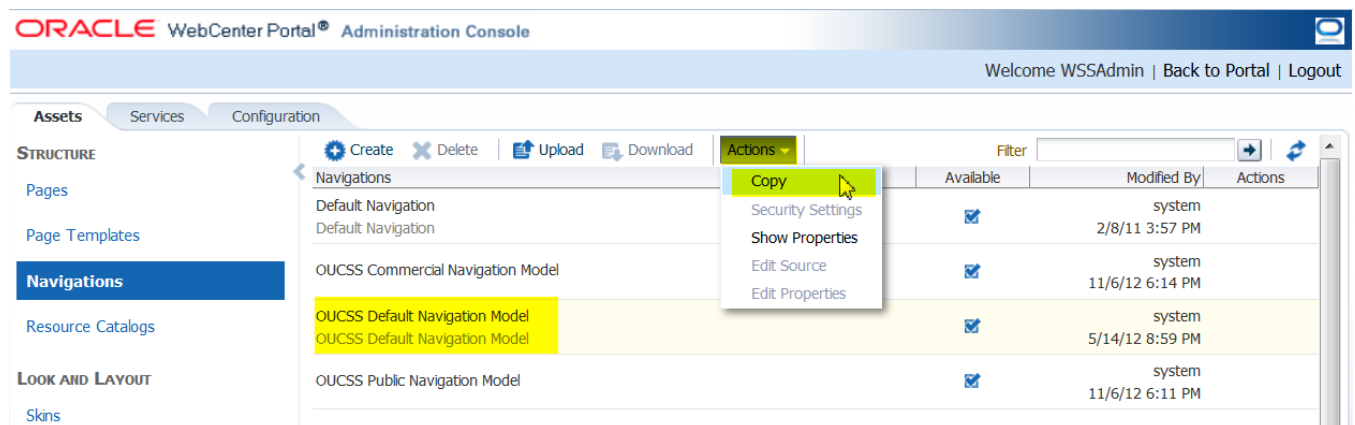
To customize the default navigation model:

- 1 Log in to the OUCSS Portal with Administrator privileges and go to the Administration Console.

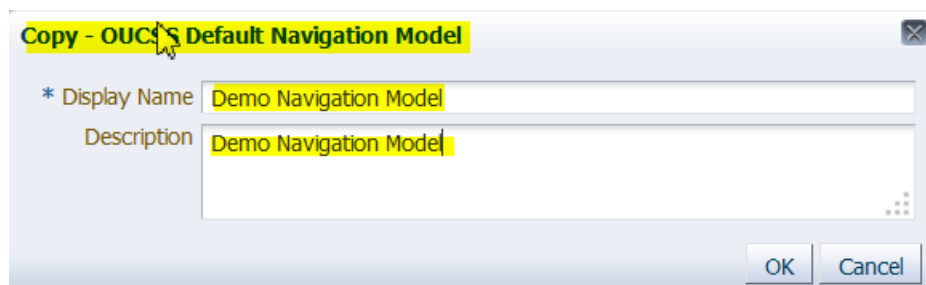
- 2 Choose the Assets tab, and then click the  **link in the  **section.****



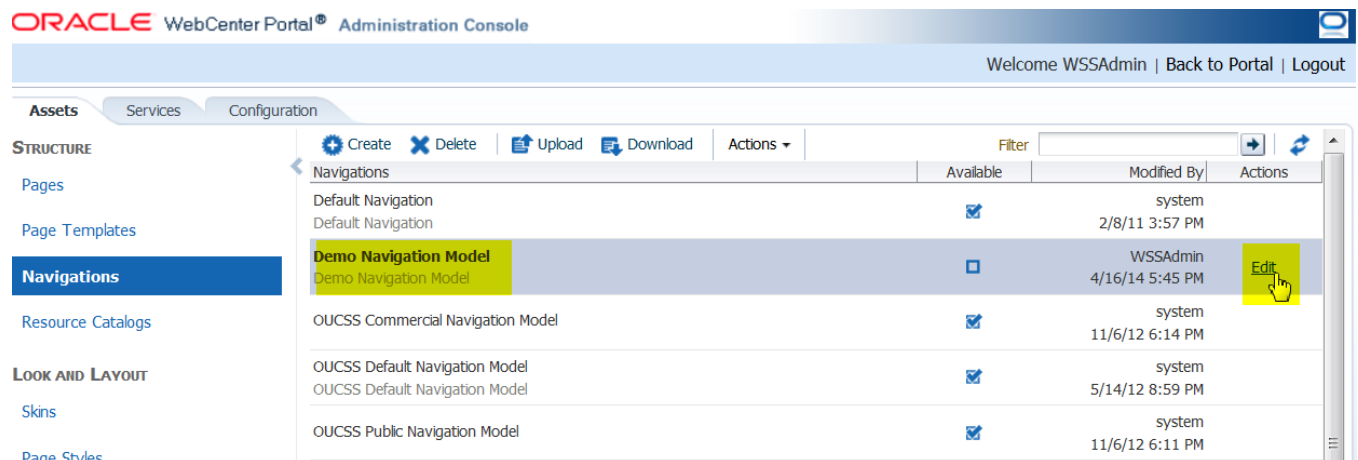
- 3 Select the navigation model that is to be customized, then click Actions > Copy to make a copy.



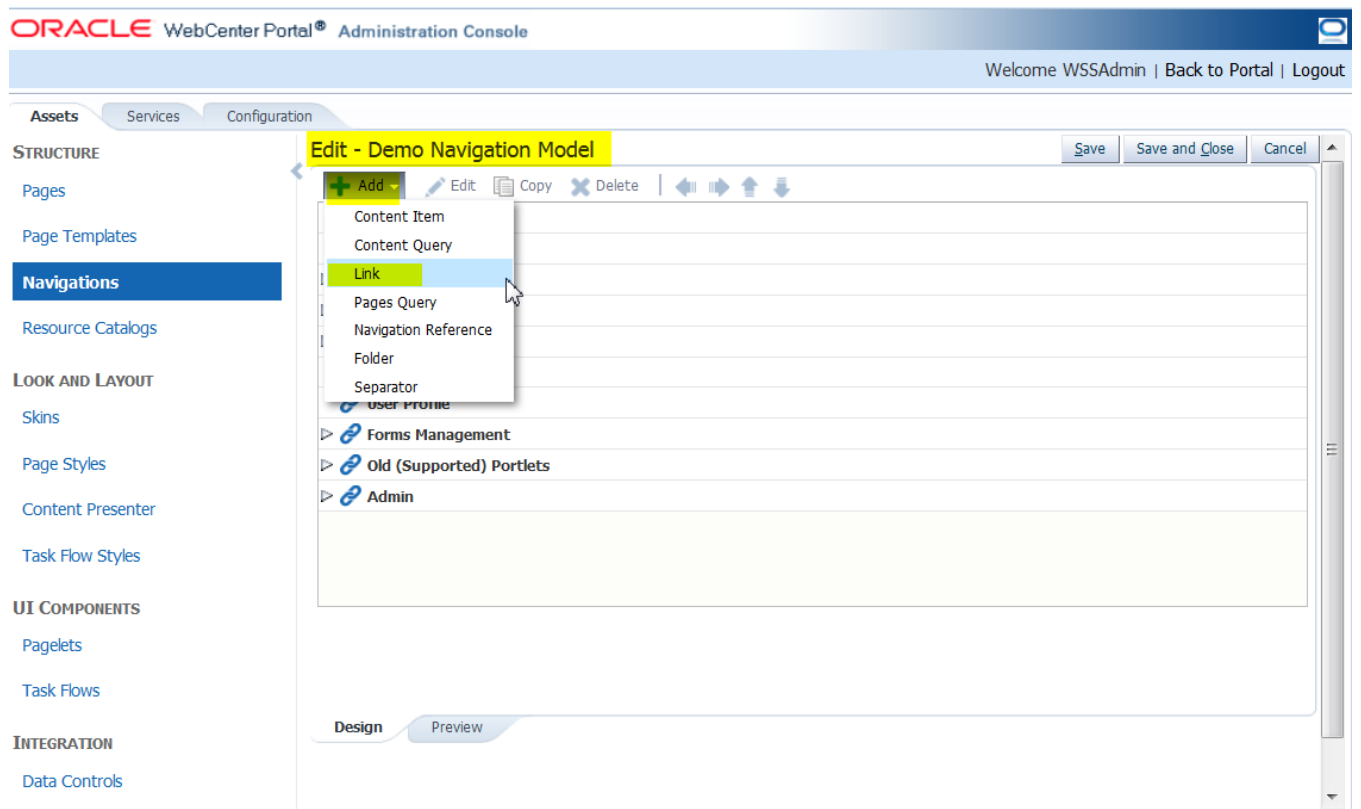
- 4 In the  **dialog, enter a name and description for the new navigation model, and then click  **to create the model.****



- 5 To begin customization, click on Edit.



- 6 Customize the navigation model per implementation requirements.



In this sample, the DemoSecuredPage.jspx from ExtendOUCSSPortal is added to the Demo Navigation Model.

**Edit Navigation Item - Link**

**Target** Options Parameters

\* ID

\* Name

Description

Visible ☒

Path

Page Not Found

Page Template

OK Cancel

Enter a URL, or enter a path to a resource. Click the search icon to b

- 7 Choose the **Preview** tab at the bottom of the Edit to verify the customized model. Click **Save and Close** when done.

**ORACLE** WebCenter Portal® Administration Console

Welcome WSSAdmin | Back to Portal | Logout

Assets Services Configurations

STRUCTURE

Pages

Page Templates

**Navigations**

Resource Catalogs

LOOK AND LAYOUT

Skins

Page Styles

Content Presenter

Task Flow Styles

UI COMPONENTS

Pagelets

Task Flows

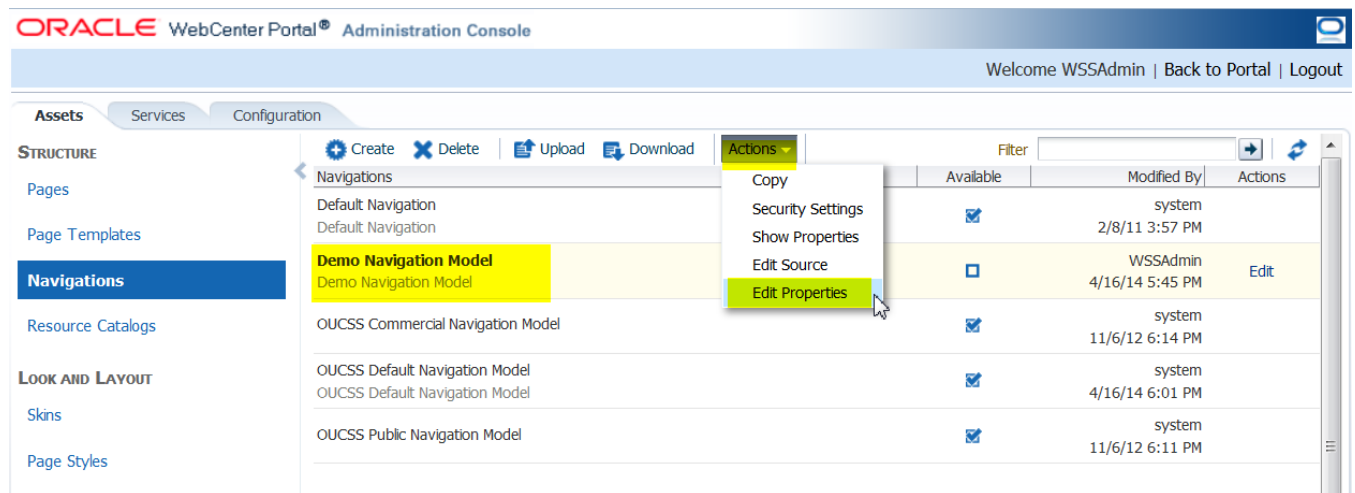
INTEGRATION

**Edit - Demo Navigation Model** Save Save and Close Cancel

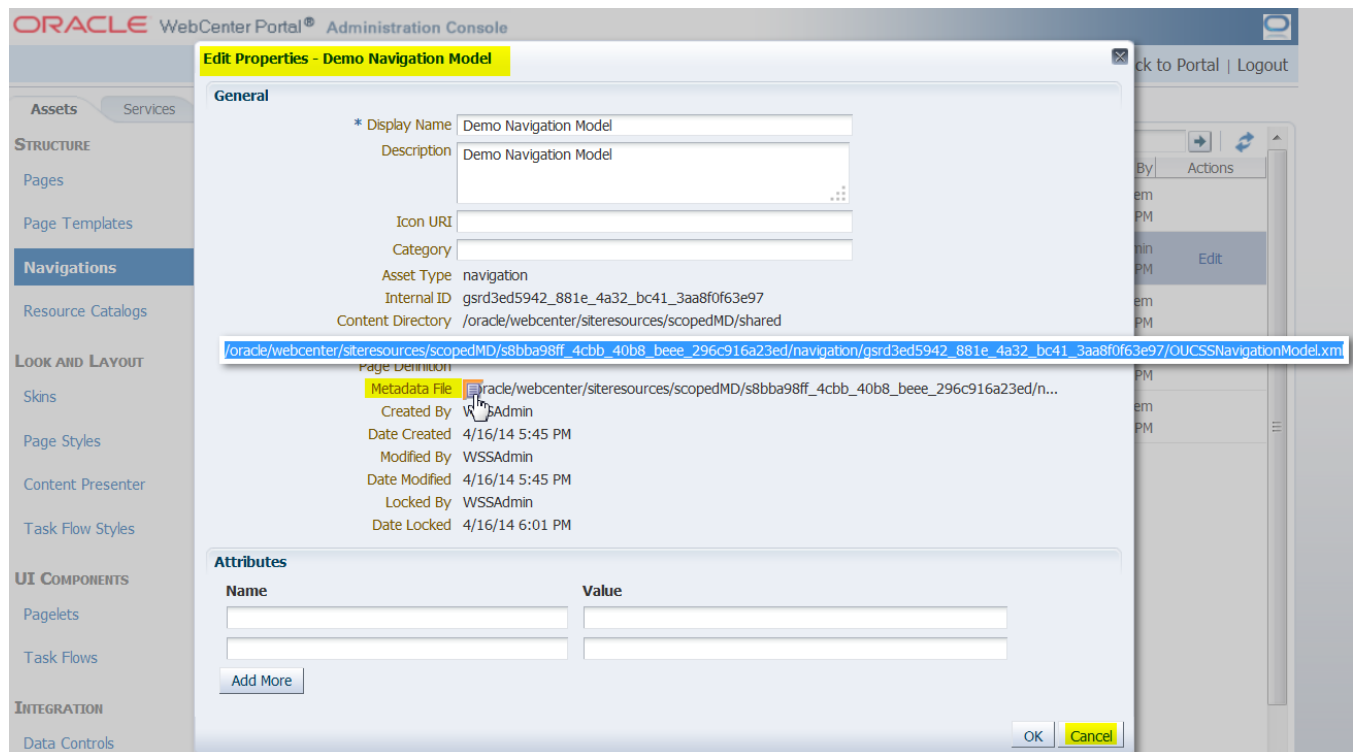
- Home
- Account(s)
- Details
- Notifications
- Outages
- New Customer
- User Profile
- Forms Management
- Old (Supported) Portlets
- Admin
- Demo Page**

Design Preview



- 8 To activate and use the new Navigation Model for one or more Context, copy the XML path of the navigation model. Click **Actions** > **Edit Properties**.



- 9 Copy the complete Metadata path of the Navigation model from the edit dialog.



- 10 Click the **Back to Portal** link to exit the Administration Console and return to the portal application. Select **Admin > Resources** page.
- 11 Filter the resources with resource codes PORTAL\_NAV. Update the “URL Override” property by selecting PORTAL\_NAV\_<<Context>> (RESIDENTIAL, PUBLIC etc) resource with the Metadata path copied in Step 9.

Actions ▾  

Resource Code	Resource Type	Locator Type	URL	URL Override
PORTAL_NAV_COMMERCIAL	WXURL	WXREL	/oracle/webcenter/portalapp/navigations/OUCSSCommercialN	
PORTAL_NAV_PUBLIC	WXURL	WXREL	/oracle/webcenter/portalapp/navigations/OUCSSPublicNavigat	
PORTAL_NAV_RESIDENTIAL	WXURL	WXREL	/oracle/webcenter/portalapp/navigations/OUCSSNavigationMo	

**Resource** Reset Save Cancel

Resource Code: PORTAL\_NAV\_RESIDENTIAL

Resource Type:

Locator Type:

URL:

URL Override:

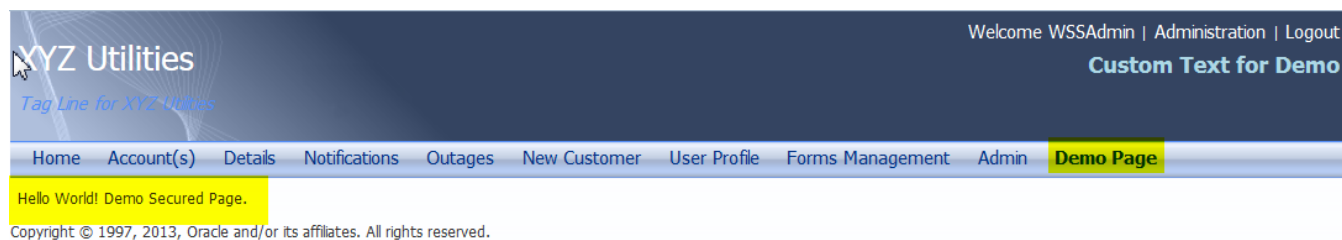
Description:

Description Override:

Help:

Help Override:

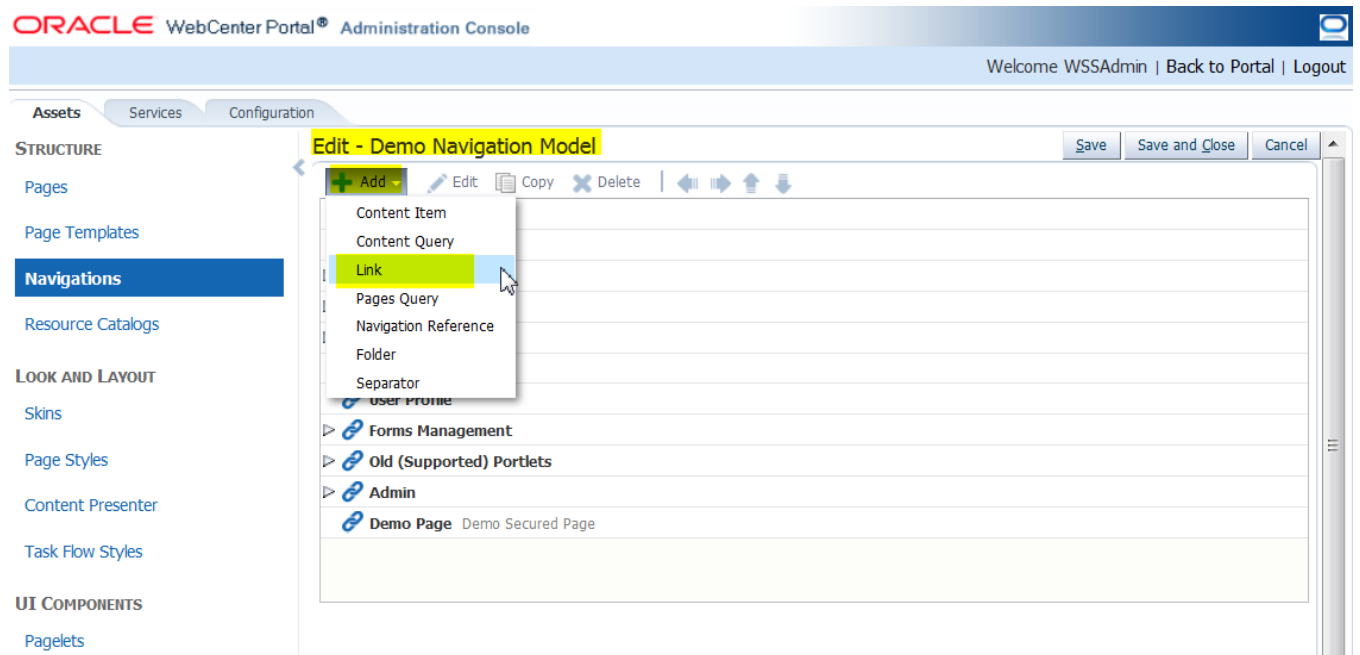
- 12 Repeat the same process to update Navigation model for other Contexts.
- 13 Restart the OUCSS Portal managed server and verify that changes are reflected.



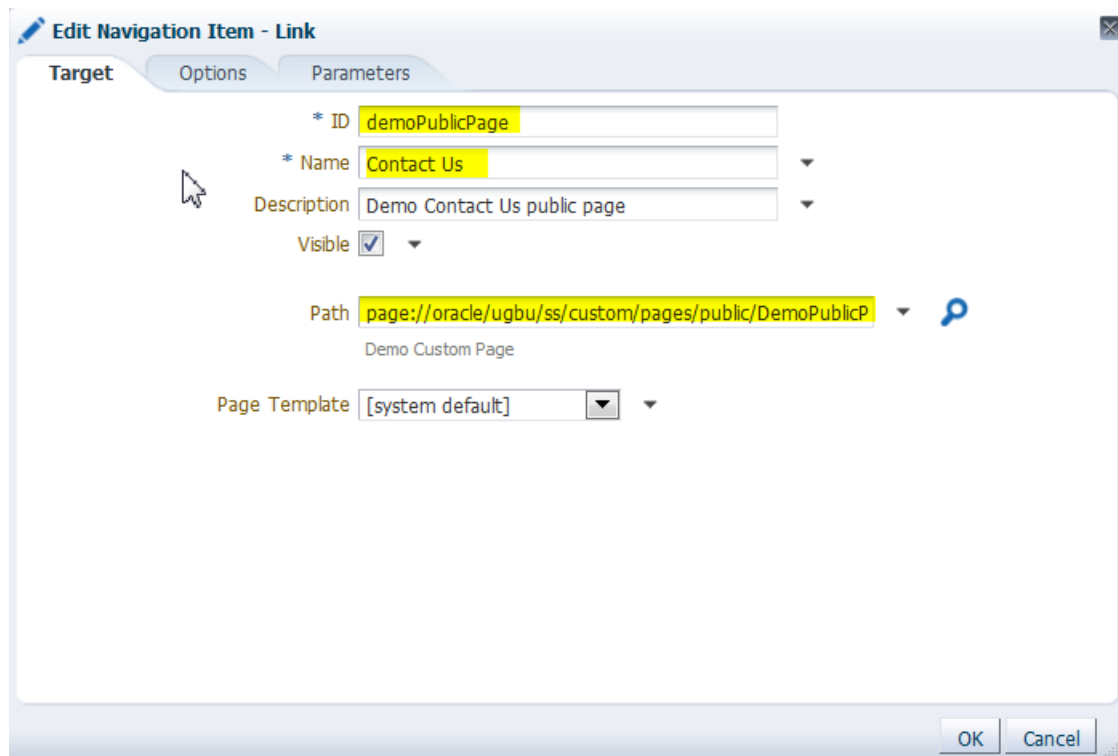
## Access Pages from Extend OUCSS Portal

Newly-added pages can be accessed by customizing the navigation model and adding links to the customized pages.

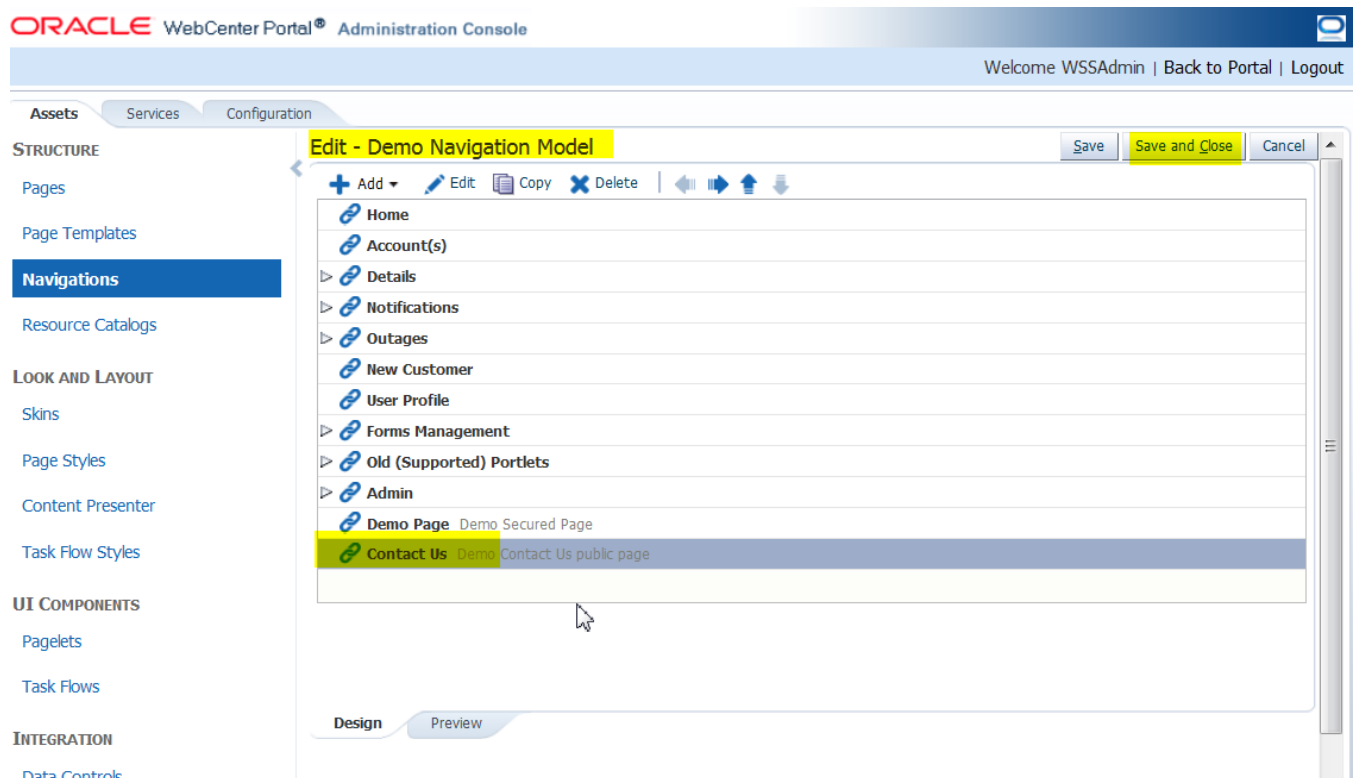
- 1 Log in to the OUCSS Portal and Edit the Demo Navigation Model.
- 2 In the **Edit** mode, click **Add > Link**.



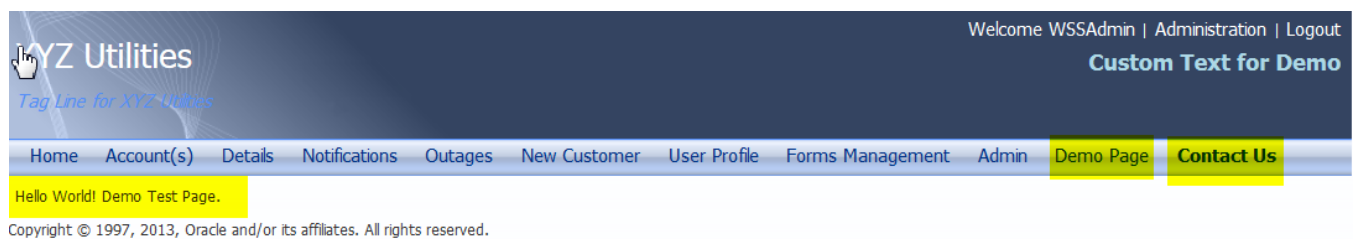
- 3 In the **Edit Navigation Item** dialog, choose the **Target** tab, enter link details, then click **OK**.



- 4 Add links to other pages per your site requirements. Click **OK** in the **Edit** dialog when finished adding links.



- 5 Click on Back to Portal link and verify that the navigation model is updated.



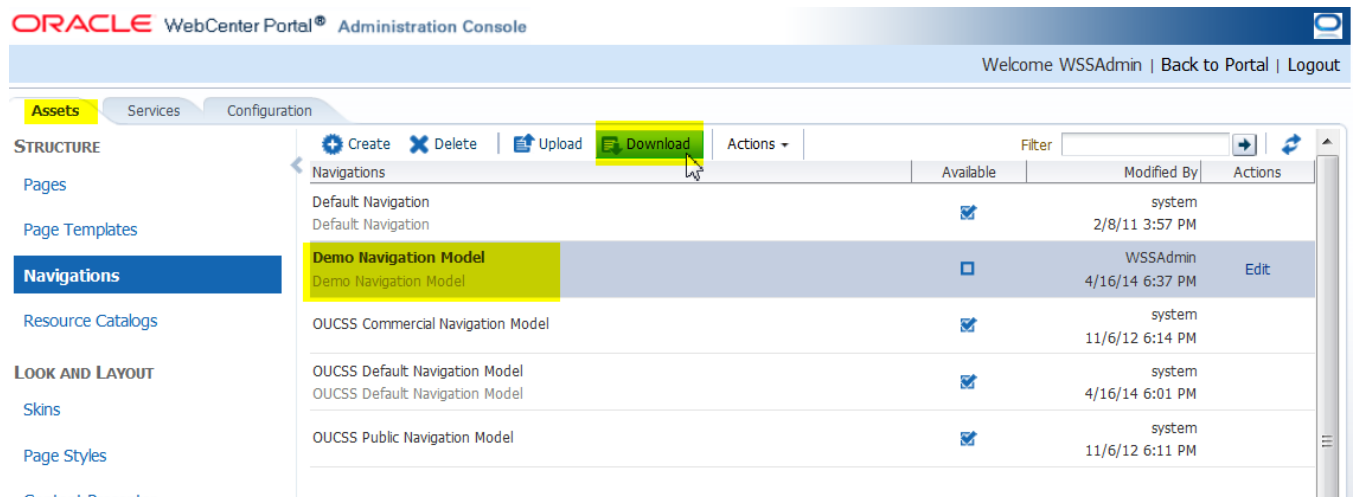
## Exporting an Existing Navigation Model

Navigation models from other Portal instances can be exported for migration and back up.

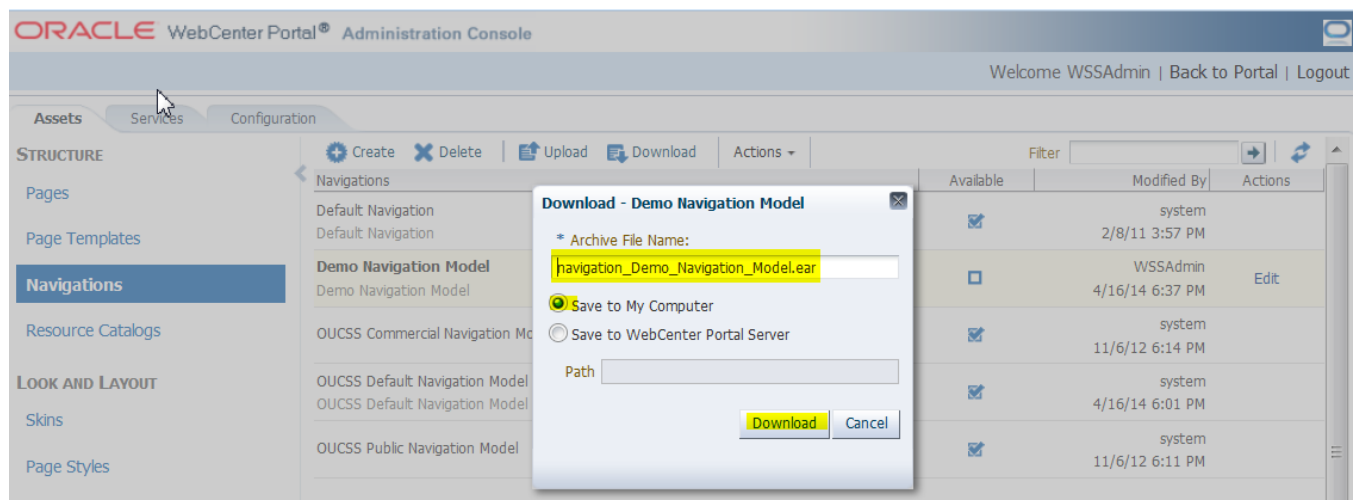
To export a navigation model:

- 1 Log in to the OUCSS Portal with Administrator privileges and go to the Administration Console.
- 2 Choose the **Assets** tab and click on the **Navigations** link.
- 3 Select the navigation model to export/download and click **Download**.





- 4 In the **Download** dialog, enter the archive name and choose the save location. Then click the **Download** button.

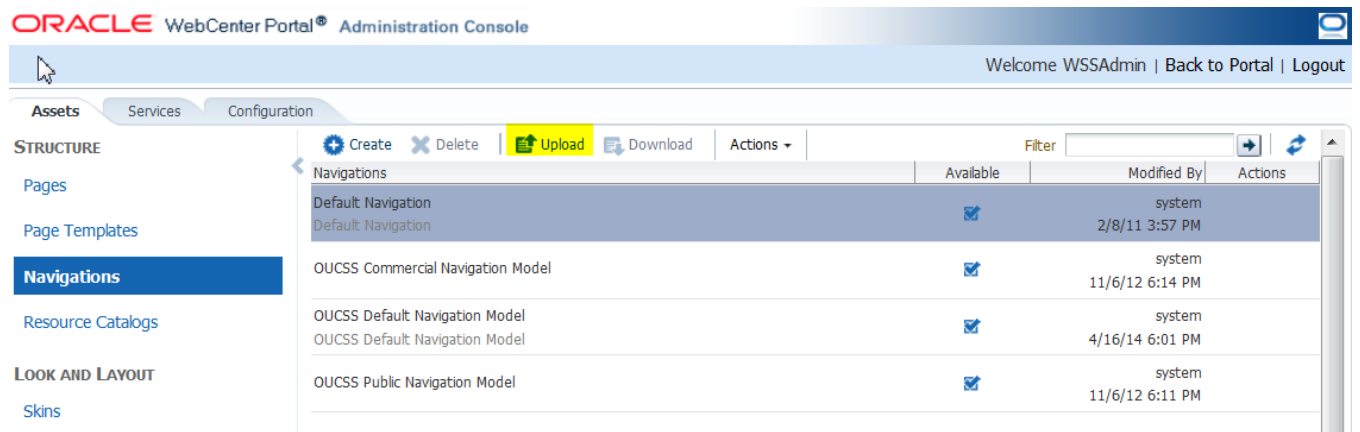


- 5 Save the file on the target location.

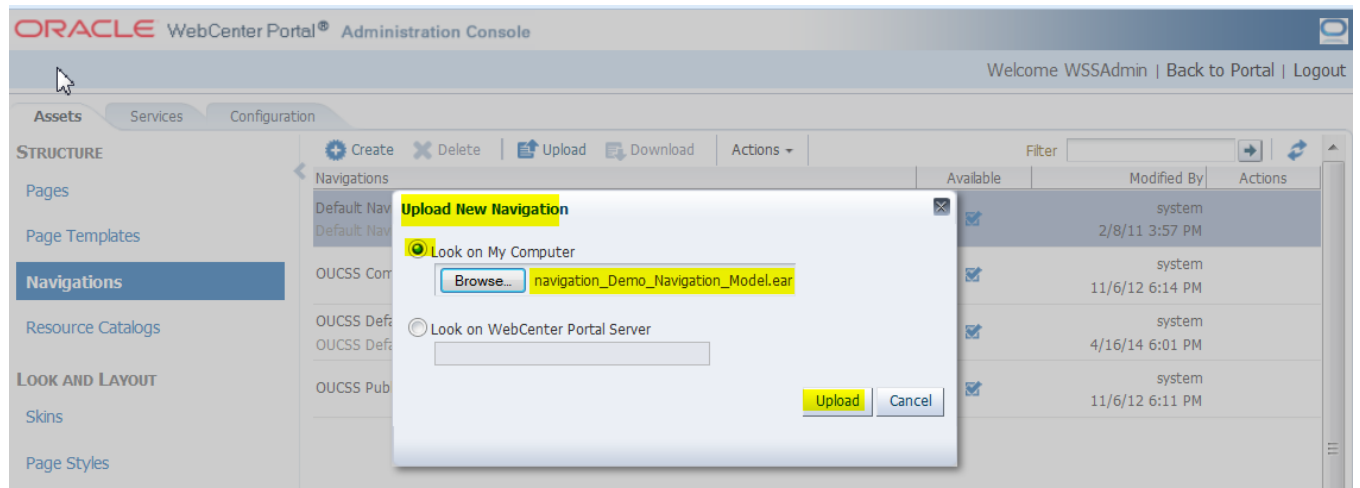
## Importing a Navigation Model

To import navigation models from other instances:

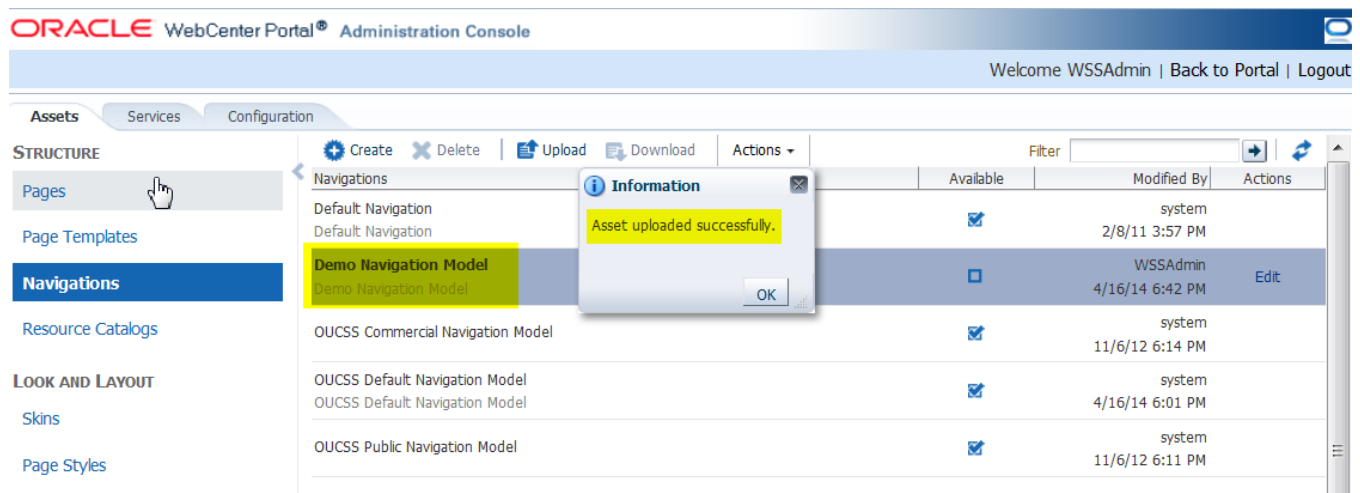
- 1 Log in to the OUCSS Portal with Administrator privileges and go to Administration Console.
- 2 Choose the **Assets** tab and click on the **Navigations** link.
- 3 Click **Upload**.



- 4 In the Upload New Navigation dialog, browse the exported navigation model archive to locate the model for import, then click **Upload**.



- 5 Click **OK** in the confirmation dialog, and verify that the imported model appears in the Navigations list.



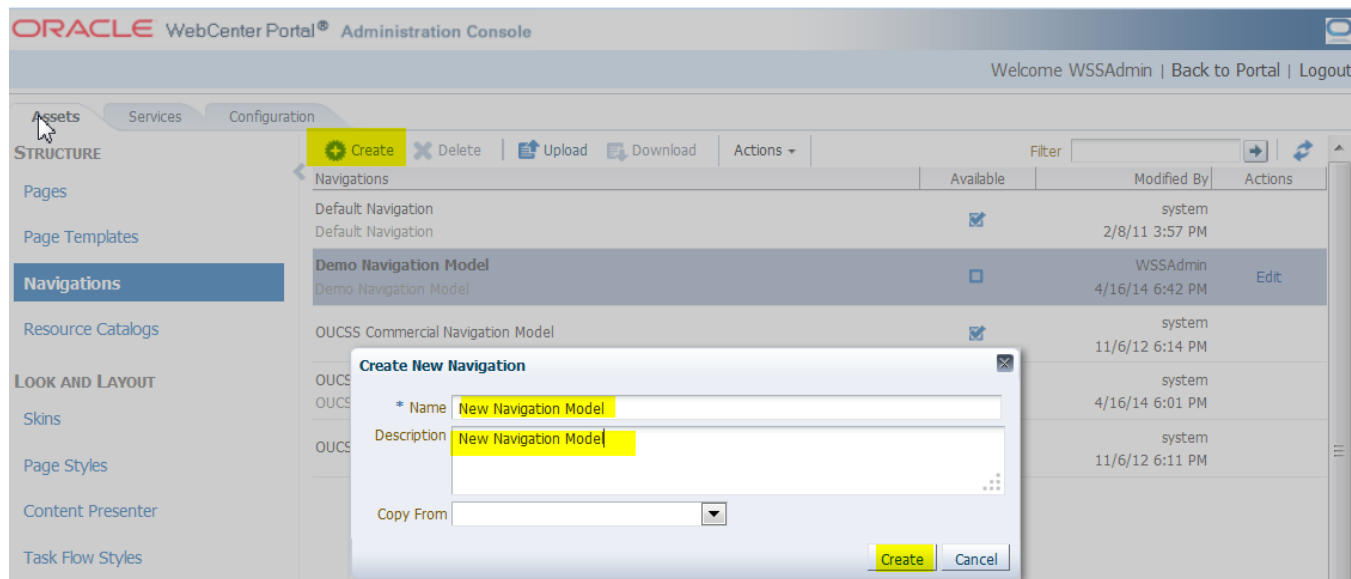
- 6 To customize and configure the imported navigation model, see the topic, “[Customizing and Configuring Existing Navigation Model](#)”.

## Creating a New Navigation Model

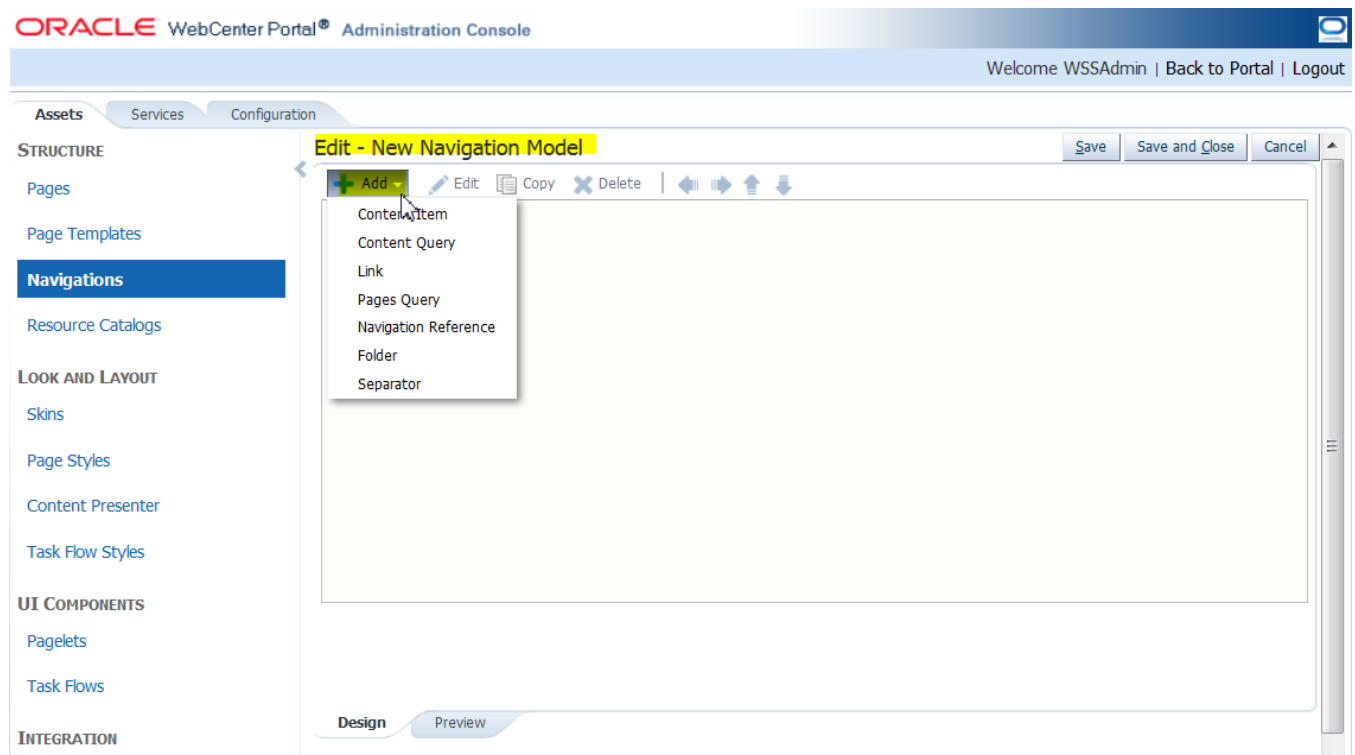
A new navigation model can be created from scratch to suit your portal needs.

To create a new navigation model:

- 1 Log in to OUCSS Portal with Administrator privileges and go to the Administration Console.
- 2 Choose the **Resources** tab and click on the **Navigations** link.
- 3 Click **Create**, on the top menu, enter the new model name and description in the Create **New Navigation** dialog, then click the **Create** button in the dialog.



- 4 To configure the new navigation model, click on **Edit**.



- 5 For details on customizing and configuring the new navigation model, see the topic, “[Customizing and Configuring an Existing Navigation Model](#)”.

## Customizing the Resource Catalog

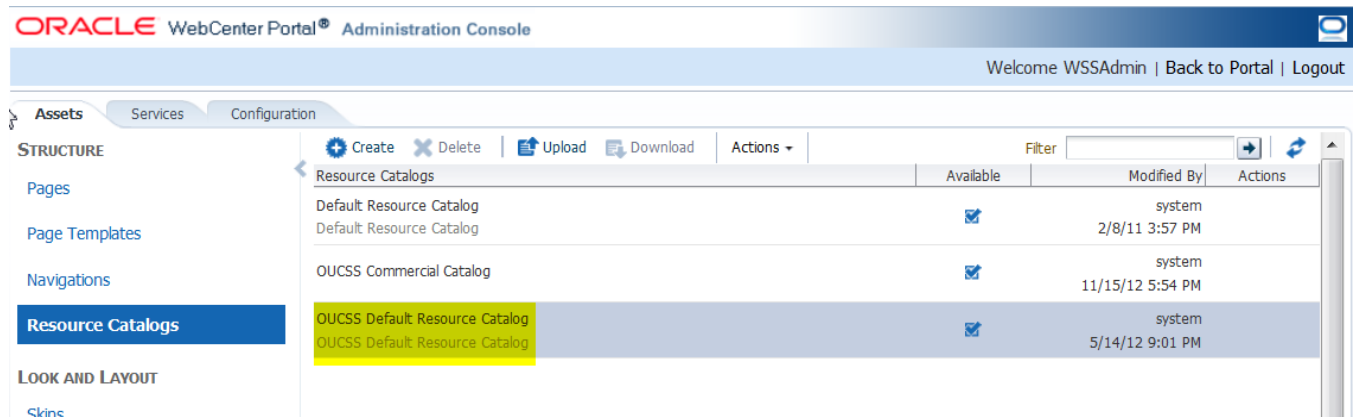
An OUCSS Portal application is configured to use separate catalog for Residential and Commercial context. Residential context is configured with OUCSS Default Resource Catalog and Commercial context is configured with OUCSS Commercial Catalog. Following sample describes customizing OUCSS Default Resource Catalog and the same steps can be followed to customize OUCSS Commercial Catalog.

For additional information on customizing the resource catalog, see

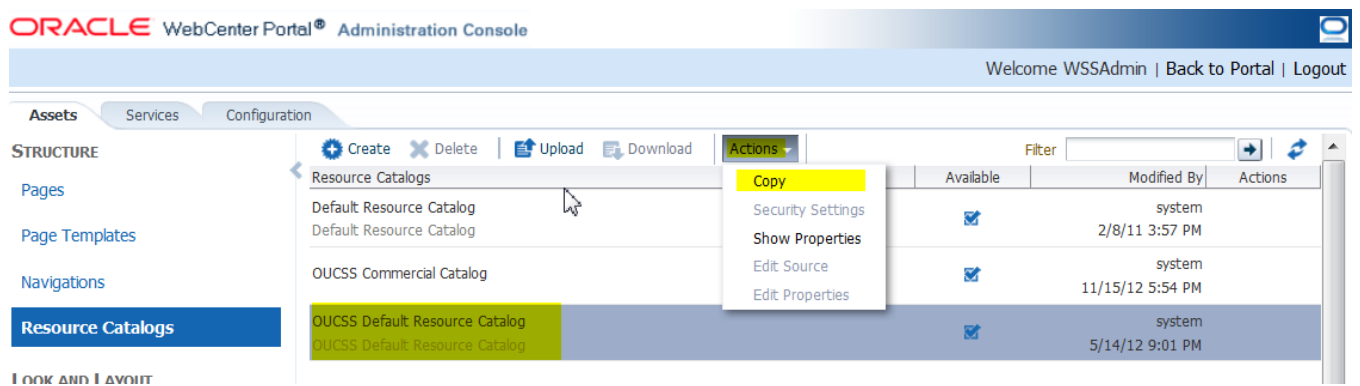
[http://docs.oracle.com/cd/E29542\\_01/webcenter.1111/e27739/jpsdg\\_catalog.htm#CHDIGIAH](http://docs.oracle.com/cd/E29542_01/webcenter.1111/e27739/jpsdg_catalog.htm#CHDIGIAH)

To consume the newly-created taskflow, a customized resource catalog must be created.

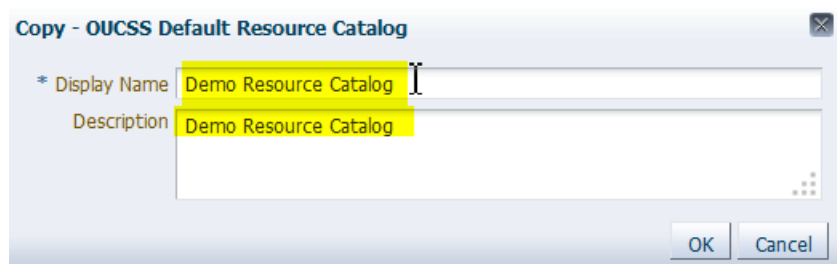
- 1 Log in to the OUCSS Portal with Administrator privileges and go to the Administration Console.
- 2 Choose the **Assets** tab and click on the **Resource Catalogs** link in the **Structure** section.



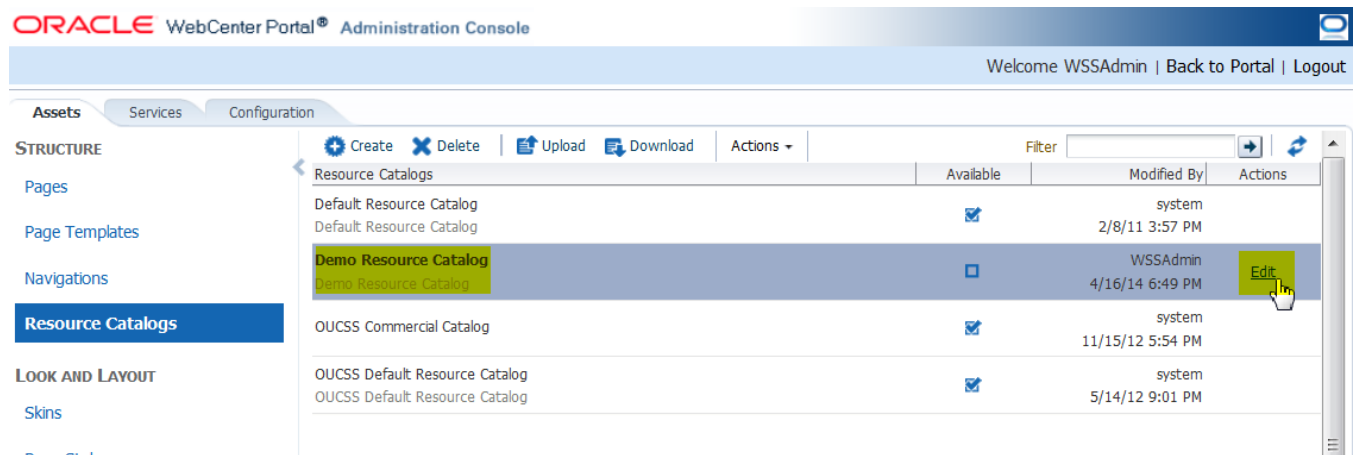
- 3 To copy the seeded catalog (which is read-only), choose **OUCSS Default Resource Catalog** and click **Actions** > **Copy**.



- 4 In the **Copy** dialog, enter the display name and description for the new catalog, then click OK.

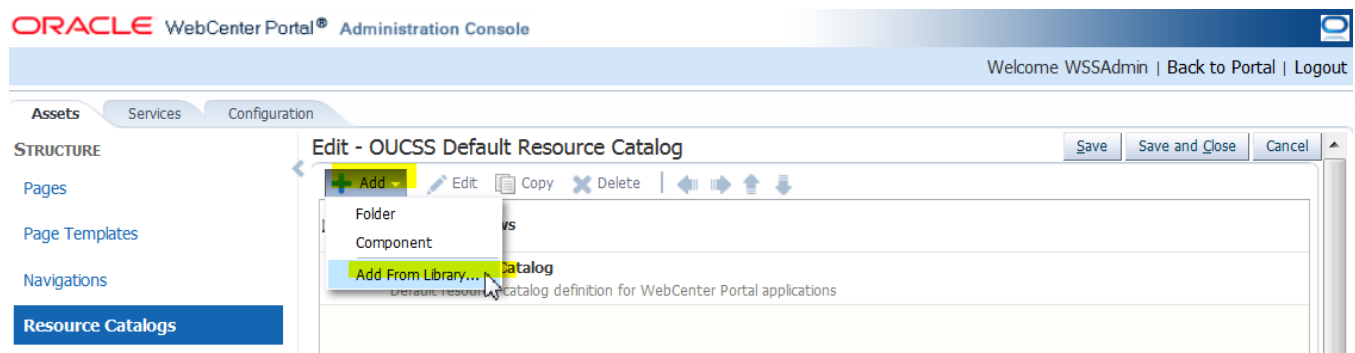


- 5 Click **Edit** to edit the catalog.



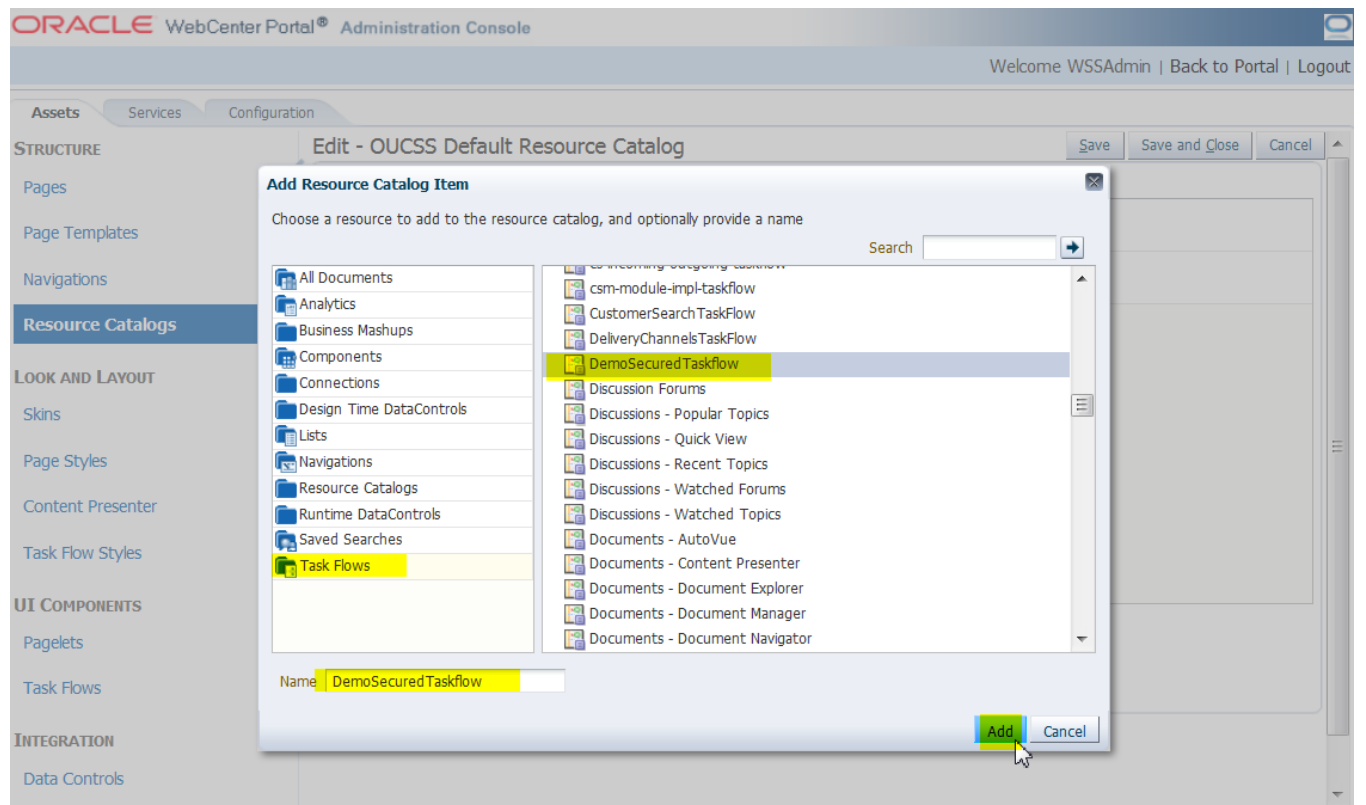
- 6 In the **Edit** dialog, click **Add > Add From Library...** to add the new taskflow to the catalog.

**Note:** You can also add folders or add the taskflow to another location in the catalog. For the purposes of this demo, the new taskflow (TestTaskflow) will be added at the catalog's root level.

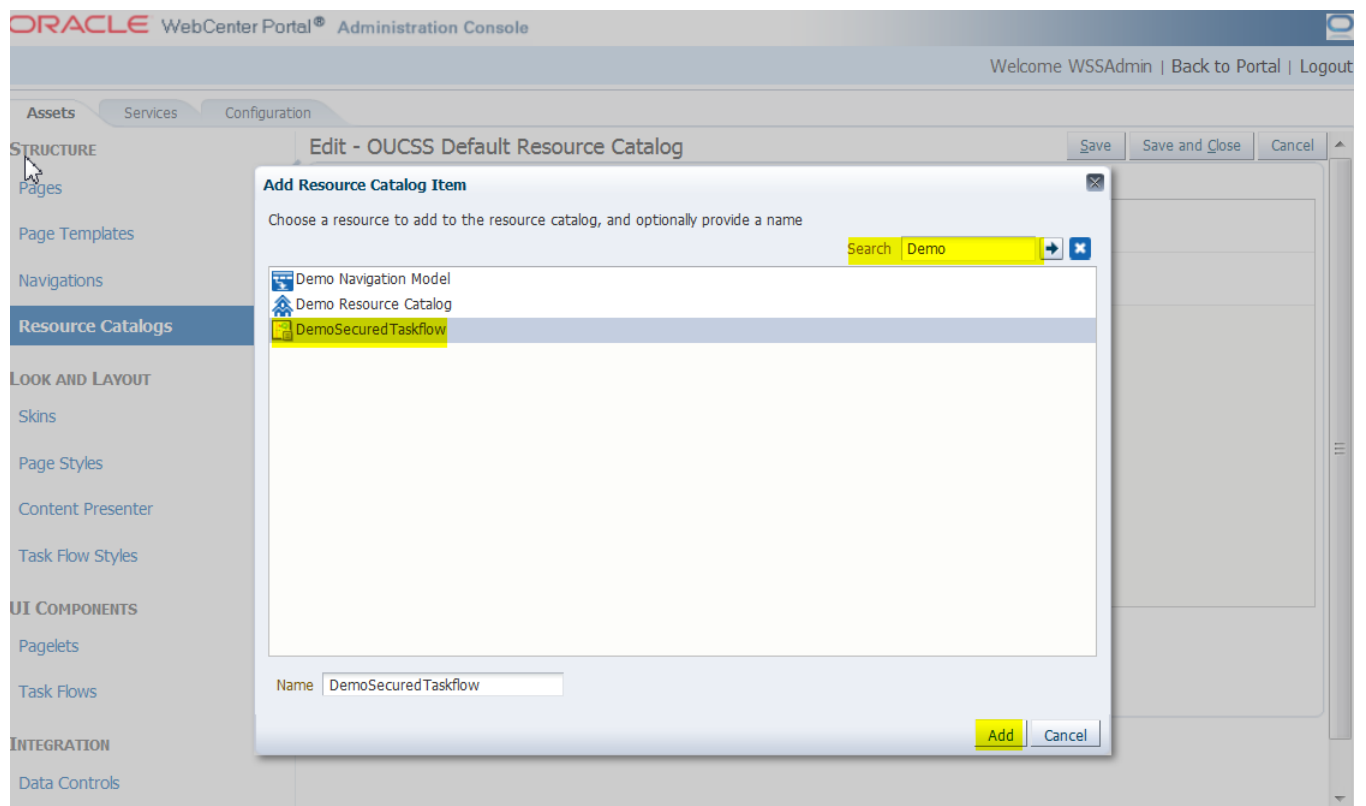


- 7 In the **Add Resource Catalog Item** dialog, select **Taskflows** from the menu on the left, then scroll down and choose the new taskflow (in this demo, the **DemoSecuredTaskflow** created earlier). Note that you can also search for the taskflow using the Search field in the dialog.

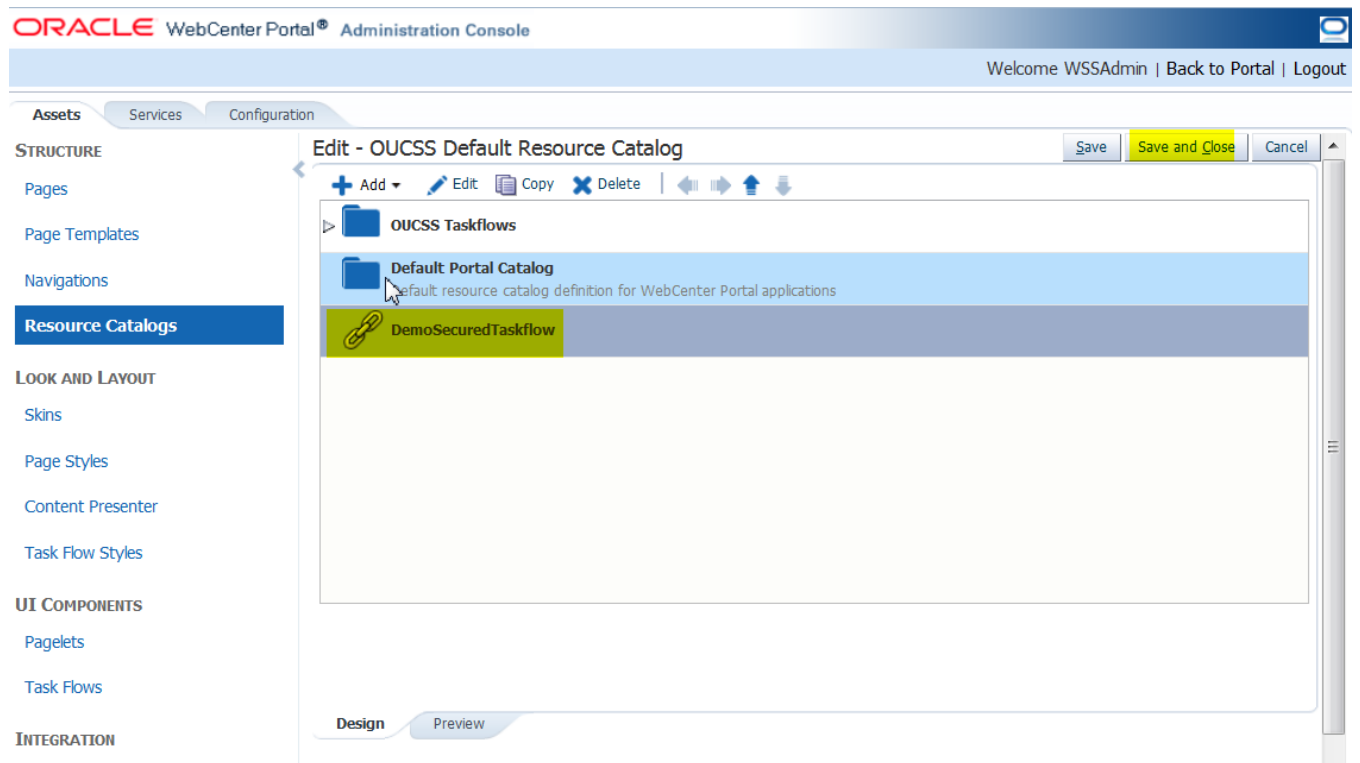
When the taskflow is selected, click the **Add** button.



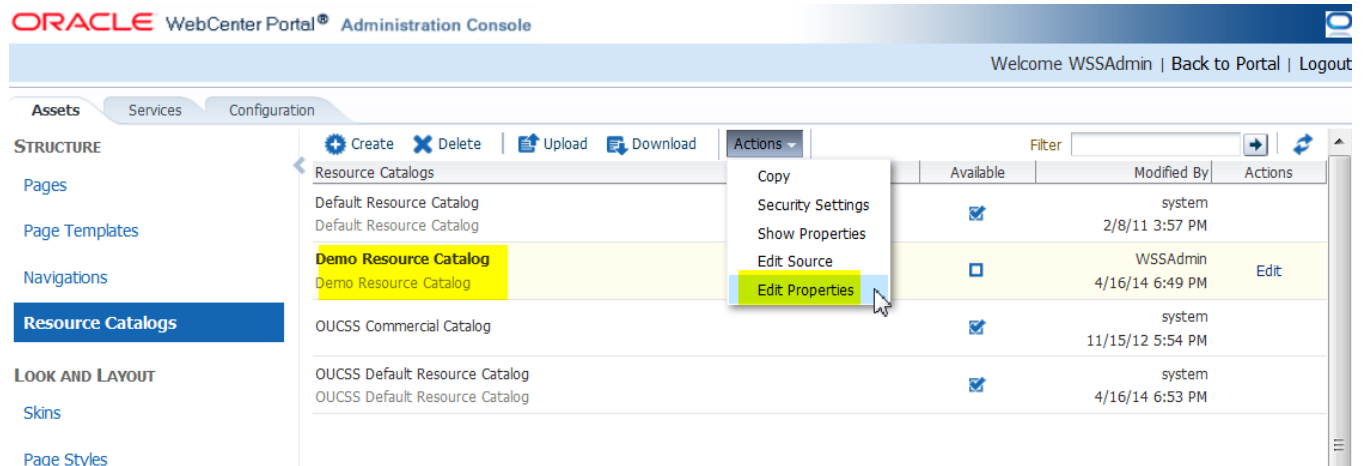
Alternatively, you can search a taskflow and add it to the Catalog.



- 8 The new taskflow now appears in the catalog list. Click **OK** to save the changes.



- 9 To activate and use the new Custom Portal Catalog as the site template for one or more Context, copy the page path of the new template. Click **Actions** -> **Edit Properties**.



- 10 Select and copy the Metadata File path from Edit Properties dialog.



**Edit Properties - Demo Resource Catalog**

**General**

\* Display Name: Demo Resource Catalog

Description: Demo Resource Catalog

Icon URI:

Category:

Asset Type: resourceCatalog

Internal ID: gsra0c2d2b2\_48ca\_4456\_995f\_043a93323acd

Metadata File: /oracle/webcenter/sitesresources/scopedMD/s8bba98ff\_4cbb\_40b8\_beee\_296c916a23ed/resourceCatalog/gsra0c2d2b2\_48ca\_4456\_995f\_043a9/OUCSSResourceCatalog.xml

Created By: WSSAdmin

Date Created: 4/16/14 6:49 PM

Modified By: WSSAdmin

Date Modified: 4/16/14 6:49 PM

Locked By: WSSAdmin

Date Locked: 4/16/14 6:54 PM

**Attributes**

Name	Value



Add More

OK Cancel

- 11 Click the **Back to Portal** link and then select **Admin > Resources** page.
- 12 Filter the resources with resource codes PORTAL\_RC\_. Update the “URL Override” property by selecting PORTAL\_RC\_<<Context>> (RESIDENTIAL or COMMERCIAL) resource with the Metadata File path copied in Step 11.

XYZ Utilities Welcome WSSAdmin | Administration | Logout  
Custom Text for Demo

Home Account(s) Details Notifications Outages New Customer User Profile Forms Management Admin Demo Page Contact Us

Actions  

Resource Code	Resource Type	Locator Type	URL	URL Override
PORTAL_RC_COMMERCIAL	WXURL	WXREL	/oracle/webcenter/portalapp/catalogs/OUCSSCommercial	
PORTAL_RC_RESIDENTIAL	WXURL	WXREL	/oracle/webcenter/portalapp/catalogs/OUCSSResourceCa	

**Resource** Reset Save Cancel

Resource Code: PORTAL\_RC\_RESIDENTIAL

Resource Type:

Locator Type:

URL: /oracle/webcenter/portalapp/catalogs/OUCSSResourceCatalog.xml

URL Override: /oracle/webcenter/sitesresources/scopedMD/s8bba98ff\_4cbb\_40b8\_beee\_296c916a23ed/resourceCatalog/gsra0c2d2b2\_48ca\_4456\_995f\_043a93323acd/OUCSSResourceCatalog.xml

Description: Resource Catalog URL for Residential Customers

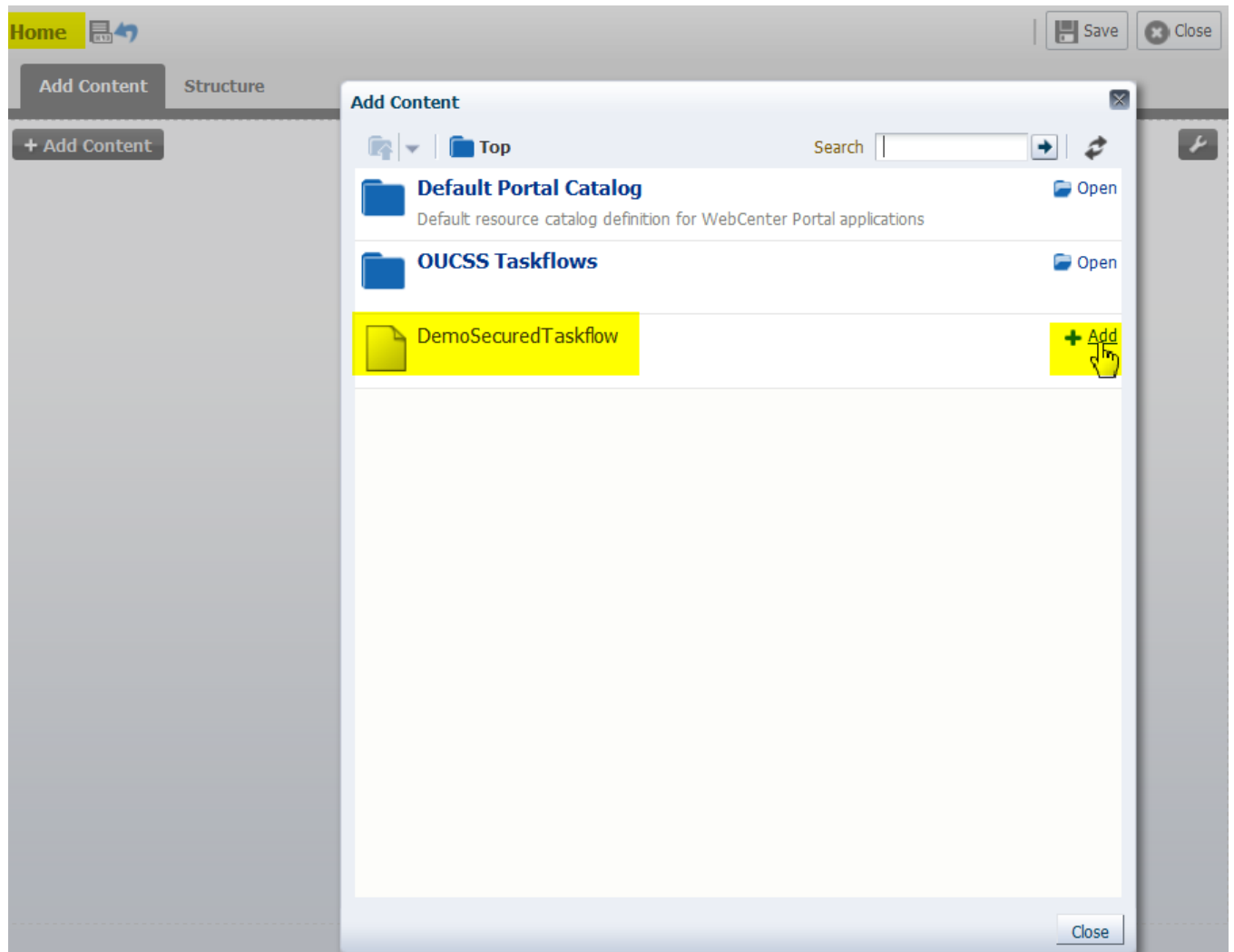
Description Override:

Help:

Help Override:

No Preview Provided

- 13 Save changes and repeat the same process to update other Context with custom Site template.
- 14 Restart the OUCSS Portal managed server and verify that changes are reflected.
- 15 Edit a page and add the Demo taskflow from Resource Catalog. Click Save and Close when done.



# Appendix A

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## Portal Labels

Portal labels and their descriptions are mentioned in the table below.

LABEL	DESCRIPTION
APP_TITLE	Application Title
DASHBOARD_TITLE	Dashboard Title
ACCOUNTS_TITLE	Accounts Title
ACCOUNT_LIST_TITLE	Accounts List Title
BILLING_HISTORY_TITLE	Billing History Title
FINANCIAL_HISTORY_TITLE	Financial History Title
BUDGET_BILLING_TITLE	Budget Billing Title
VIEW_BILL_TITLE	View Bill Title
HOME_TITLE	Home Title
COMPARE_RATES_TITLE	Compare Rates Title
USAGE_DETAILS_TITLE	Usage Details Title
PERSONAL_INFO_TITLE	Personal Info Title
OUTAGE_DETAIL_TITLE	Outage Detail Title
REPORT_OUTAGE_TITLE	Report Outage Title
SERVICE_MGMT_TITLE	Service Management Title
START_SERVICE_TITLE	Start Service Title
STOP_SERVICE_TITLE	Stop Service Title

TRANSFER_SERVICE_TITLE	Transfer Service Title
OUTAGES_TITLE	Outage Title
OUTAGE_MAP_TITLE	Outage Map Title
OUTAGE_TABLE_TITLE	Outage Table Title
REPORT_PUBLIC_OUTAGE_TITLE	Report Public Outage Title
NEW_CUSTOMER_TITLE	New Customer Title
SCALAR_READ_TITLE	Scalar Read Title
CHANGE_PASSWORD_TITLE	Change Password Title
CHANGE_USER_INFO_TITLE	Change User Info Title
MANAGE_ADDRESS_TITLE	Manage Address Title
MANAGE_PHONE_TITLE	Manage Phone Title
MANAGE_EBILL_TITLE	Manage EBill Title
MANAGE_AUTOPAY_TITLE	Manage Autopay Title
MANAGE_BILLNOTIFY_TITLE	Manage Bill Notify Title
ONETIME_PAY_TITLE	One-time Payment Title
PAY_ARRANGEMENT_TITLE	Pay Arrangement Title
PASSWORD_RESET_TITLE	Password Reset Title
REGISTER_TITLE	Register Title
EDUCATION_TITLE	Education Title
ENVIRONMENT_TITLE	Environment Title
EDU_SERVICE_TITLE	Service Title
EDU_SAFETY_TITLE	Safety Title
EDU_CONSERVATION_TITLE	Conservation Title
ABOUT_TITLE	About Title
ABOUT_ORACLE_TITLE	About Oracle Title
ABOUT_UGBU_TITLE	About UGBU Title
ABOUT_OUCSS_TITLE	About OUCSS Title
HOME_BANNER_DESC	Home Banner
HOME_SECTION_DESC	Home Section Links
LOGIN_TITLE	Login Title
USER_PROFILE_TITLE	User Profile Title
WEBCENTER_RC_ITEMS	WebCenter Items
ENROLL_WRAPPER	Enroll Wrapper
ENROLL	Enroll

ADMIN_USER_TITLE	Admin User Title
ADMIN_LABEL_TITLE	Label Title
ADMIN_LOOKUP_TITLE	Lookup Title
ADMIN_SECURITY_TITLE	Security Title
ADMIN_MESSAGE_TITLE	Message Title
ADMIN_TRAIN_TITLE	Train Title
ADMIN_RESOURCE_TITLE	Resource Title
ADMIN_ACCESS_TITLE	Access Title
ADMIN_EDGEAPP_TITLE	Edge Application Title
ADMIN_TITLE	Admin Title
ADMIN_SYSTEM_TITLE	Admin Configuration Options
ADMIN_LOB_TITLE	Line of Business Title
ADMIN_PORTLET_TITLE	Portlets Title
ADMIN_LANGUAGE_TITLE	Language Title
ADMIN_OFFERS_TITLE	Offers Title
OUCSS_ADMIN_TASKFLOWS	OUCSS Admin Taskflows
VIEW_ACCOUNT_TITLE	View Account Title
DETAILS_MENU	Details Menu Title
BANNER_PROMOTION_TITLE	Promotional Banner Title
ACCOUNT_SUMMARY_TITLE	Account Summary Title
OUCSS_BASE_TASKFLOWS	OUCSS Base Taskflows Title
BASE_RC_TITLE	Base Title
BILLING_AND_PAYMENT_RC_TITLE	Billing and Payment Title
BILLING_AND_PAYMENT_RC_DESC	OUCSS Billing and Payment Taskflows Title
CUSTOMER_SERVICE_RC_TITLE	Customer Service Management Title
TASKFLOWS_RELATED_TO_OUCSS_SER	Taskflows related to OUCSS Service Management
ADMIN_RC_TITLE	Admin Title
ADMIN_RC_DESC	Taskflows related to OUCSS Administration.
OFFERS_RC_TITLE	Offers Title
OFFERS_RC_DESC	Taskflows related to OUCSS Offers
BASE_RC_DESC	Taskflows related to OUCSS Base/Core functionality
OUCSS_TASKFLOWS_TITLE	OUCSS Taskflows Title
OUCSS_TASKFLOWS_RC_TITLE	OUCSS Taskflows Title
OUCSS_COMM_TASKFLOWS_RC_TITLE	OUCSS Commercial Taskflows Title

ERR_UNAUTH_TITLE	Un-Authorized Title
ERR_UNAUTH_ERROR_DESC	User Un-Authorized Error Description
ERR_PAGENOTFOUND_TITLE	Page Not Found Error Title
ERR_PAGENOTFOUND_DESC	Page Not Found Error Description
ERR_TITLE	Error Title
ERR_DESC	Description for Unknown Exception
GOTO_HOME_LINK	Go to Home Link
LOGIN_TASKFLOW_RC_TITLE	Login Taskflow Title
LOGIN_TASKFLOW_RC_DESC	Description for Login Taskflow with Context enabled
USAGE_COMPARE_TITLE	Usage Compare Title
USAGE_AGGREGATE_TITLE	Usage Aggregate Title
COMMERCIAL_BCONTEXT_TITLE	Commercial Business Context Title
SET_ACCOUNTS_TITLE	Set Accounts Title
SET_MANAGEMENT_TF_TITLE	Set Management Title
CREATE_SET_TITLE	Create Set Title
NOTIFICATIONS	Notifications Title
NOTIFICATION_LIST	Notification Inbox Title
NOTIFICATION_CHANNELS	Notification Profile Title
NOTIFICATION_PREFERENCES	Notification Preferences Title
CUSTOMER_SEARCH_TITLE	Customer Search Title
ACCOUNT_SEARCH	Account Search Title
NAME_AND_ADDRESS_SEARCH	Name and Address Search
SEARCH_RESULTS_GRID	Search Results
ENTER_FORM	Enter Form
FORMS_MANAGEMENT	Forms Management Title
LOG_AN_ISSUE	Log an Issue Description
FORM_LIST	Form List Title
UPDATE_FORM	Update Form Title
SCALAR_USAGE_DETAILS	Scalar Usage Details Description
ACCOUNT_DOCUMENTS_TITLE	Account Documents Title
PREPAID_BALANCE_AND_CHARGES	Prepaid Balance And Charges Title
PREPAID_ESTIMATES_AND_COST	Prepaid Estimates And Cost Title
SERVICE_CHARGES_TITLE	Service Charge To Date Title
USAGE_OVERVIEW_TITLE	Usage Overview Title

CONSUMPTION_SUMMARY_TITLE	Consumption Summary Title
ALERTS_TITLE	Alerts Title
OLD_SUPPORTED_PORTLETS	Old (Supported) Portlets Title
MULTIACCOUNT	Multi-Account Title
VALIDATE_EMAIL_TITLE	Validate Email
CSR_VIEW_TITLE	CSR View