ORACLE

PEOPLESOFT

# PeopleSoft Interaction Hub 9.1: Using Portal Features

September 2014

ORACLE

PeopleSoft Interaction Hub 9.1: Using Portal Features
CDSKU ps91pbr5

## Third Party Content, Products, and Services Disclaimer

This software or hardware and documentation may provide access to or information on content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services.

## Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.

Access to Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

# Contents



# Preface

## Understanding the PeopleSoft Online Help and PeopleBooks

The PeopleSoft Online Help is a website that enables you to view all help content for PeopleSoft Applications and PeopleTools. The help provides standard navigation and full-text searching, as well as context-sensitive online help for PeopleSoft users.

### PeopleSoft Hosted Documentation

You access the PeopleSoft Online Help on Oracle's PeopleSoft Hosted Documentation website, which enables you to access the full help website and context-sensitive help directly from an Oracle hosted server. The hosted documentation is updated on a regular schedule, ensuring that you have access to the most current documentation. This reduces the need to view separate documentation posts for application maintenance on My Oracle Support, because that documentation is now incorporated into the hosted website content. The Hosted Documentation website is available in English only.

**Note:** Only the most current release of hosted documentation is updated regularly. After a new release is posted, previous releases remain available but are no longer updated.

### Locally Installed Help

If your organization has firewall restrictions that prevent you from using the Hosted Documentation website, you can install the PeopleSoft Online Help locally. If you install the help locally, you have more control over which documents users can access and you can include links to your organization's custom documentation on help pages.

In addition, if you locally install the PeopleSoft Online Help, you can use any search engine for full-text searching. Your installation documentation includes instructions about how to set up Oracle Secure Enterprise Search for full-text searching.

See *PeopleTools Installation* for your database platform, "Installing PeopleSoft Online Help." If you do not use Secure Enterprise Search, see the documentation for your chosen search engine.

**Note:** Before users can access the search engine on a locally installed help website, you must enable the Search portlet and link. Click the Help link on any page in the PeopleSoft Online Help for instructions.

### Downloadable PeopleBook PDF Files

You can access downloadable PDF versions of the help content in the traditional PeopleBook format. The content in the PeopleBook PDFs is the same as the content in the PeopleSoft Online Help, but it has a different structure and it does not include the interactive navigation features that are available in the online help.

## Common Help Documentation

Common help documentation contains information that applies to multiple applications. The two main types of common help are:

- Application Fundamentals
- Using PeopleSoft Applications

Most product families provide a set of application fundamentals help topics that discuss essential information about the setup and design of your system. This information applies to many or all applications in the PeopleSoft product family. Whether you are implementing a single application, some combination of applications within the product family, or the entire product family, you should be familiar with the contents of the appropriate application fundamentals help. They provide the starting points for fundamental implementation tasks.

In addition, the *PeopleTools: Applications User's Guide* introduces you to the various elements of the PeopleSoft Pure Internet Architecture. It also explains how to use the navigational hierarchy, components, and pages to perform basic functions as you navigate through the system. While your application or implementation may differ, the topics in this user's guide provide general information about using PeopleSoft Applications.

## Field and Control Definitions

PeopleSoft documentation includes definitions for most fields and controls that appear on application pages. These definitions describe how to use a field or control, where populated values come from, the effects of selecting certain values, and so on. If a field or control is not defined, then it either requires no additional explanation or is documented in a common elements section earlier in the documentation. For example, the Date field rarely requires additional explanation and may not be defined in the documentation for some pages.

## Typographical Conventions

The following table describes the typographical conventions that are used in the online help.

| ***Typographical Convention*** | ***Description*** |
|---|---|
| Key+Key | Indicates a key combination action. For example, a plus sign ( +) between keys means that you must hold down the first key while you press the second key. For Alt+W, hold down the Alt key while you press the W key. |
| . . . (ellipses) | Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax. |
| { } (curly braces) | Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe ( \| ). |
| [ ] (square brackets) | Indicate optional items in PeopleCode syntax. |

| *Typographical Convention* | *Description* |
|---|---|
| & (ampersand) | When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object.<br><br>Ampersands also precede all PeopleCode variables. |
| ⇒ | This continuation character has been inserted at the end of a line of code that has been wrapped at the page margin. The code should be viewed or entered as a single, continuous line of code without the continuation character. |

## ISO Country and Currency Codes

PeopleSoft Online Help topics use International Organization for Standardization (ISO) country and currency codes to identify country-specific information and monetary amounts.

ISO country codes may appear as country identifiers, and ISO currency codes may appear as currency identifiers in your PeopleSoft documentation. Reference to an ISO country code in your documentation does not imply that your application includes every ISO country code. The following example is a country-specific heading: "(FRA) Hiring an Employee."

The PeopleSoft Currency Code table (CURRENCY_CD_TBL) contains sample currency code data. The Currency Code table is based on ISO Standard 4217, "Codes for the representation of currencies," and also relies on ISO country codes in the Country table (COUNTRY_TBL). The navigation to the pages where you maintain currency code and country information depends on which PeopleSoft applications you are using. To access the pages for maintaining the Currency Code and Country tables, consult the online help for your applications for more information.

## Region and Industry Identifiers

Information that applies only to a specific region or industry is preceded by a standard identifier in parentheses. This identifier typically appears at the beginning of a section heading, but it may also appear at the beginning of a note or other text.

Example of a region-specific heading: "(Latin America) Setting Up Depreciation"

### Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in the PeopleSoft Online Help:

- Asia Pacific
- Europe
- Latin America
- North America

### Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following industry identifiers may appear in the PeopleSoft Online Help:

- USF (U.S. Federal)
- E&G (Education and Government)

## Access to Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

## Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.

# Using and Managing the PeopleSoft Online Help

Click the Help link in the universal navigation header of any page in the PeopleSoft Online Help to see information on the following topics:

- What's new in the PeopleSoft Online Help.
- PeopleSoft Online Help acessibility.
- Accessing, navigating, and searching the PeopleSoft Online Help.
- Managing a locally installed PeopleSoft Online Help website.

# About PeopleSoft Interaction Hub

This section discusses:

- PeopleSoft Portal Solutions product family.
- PeopleSoft Interaction Hub and PeopleTools.

## PeopleSoft Portal Solutions Product Family

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

- PeopleSoft Interaction Hub.
- PeopleSoft Internal Controls Enforcer.

### PeopleSoft Interaction Hub

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

PeopleSoft Interaction Hub 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.

Two key characteristics distinguish PeopleSoft Interaction Hub as a rich Web 2.0 platform:

- First, PeopleSoft Interaction Hub is a traditional portal framework that can be used for aggregating and managing content from multiple applications and sources. With unified navigation, it is now simple to configure PeopleSoft Interaction Hub to federate multiple PeopleSoft application systems.
- Second, its collaborative capabilities make PeopleSoft Interaction Hub a functional application that complements the features found in PeopleSoft applications.

### PeopleSoft Internal Controls Enforcer

Oracle's PeopleSoft 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 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 the product documentation for  Internal Controls Enforcer.

## PeopleSoft Interaction Hub and PeopleTools Portal Technology

To understand the functionality of PeopleSoft Interaction Hub, Oracle recommends that you familiarize yourself with PeopleTools, focusing especially on the subject areas and sections that are devoted to portal functionality. Because PeopleSoft Interaction Hub builds upon the basic internet architecture that is delivered with PeopleTools, this information gives you an excellent foundation of knowledge upon which the PeopleSoft Interaction Hub suite of documentation 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 HRMS or Oracle's PeopleSoft 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, content management, navigation, and homepage personalization.

Product documentation for PeopleTools covers the PeopleSoft Pure Internet Architecture and PeopleTools portal technology in detail.

See *PeopleTools: Portal Technology*.

# Related Documentation

This section discusses:

- PeopleSoft Interaction Hub documentation.
- PeopleTools documentation.

## PeopleSoft Interaction Hub Documentation

PeopleSoft Interaction Hub documentation includes:

- *PeopleSoft Interaction Hub: Branding*

  This subject covers PeopleSoft Interaction Hub's branding feature, which is built on the PeopleTools branding framework. Branding enables you to create branding definitions and apply branding themes to portals, sites, and workspaces allowing you to create a differentiated appearance for specific user audiences.

- *PeopleSoft Interaction Hub: Collaborative Workspaces*

  This subject covers setup, administration, and use of collaborative workspaces, which are virtual team rooms that facilitate collaboration on a variety collaborative projects and processes.

- *PeopleSoft Interaction Hub: Content Management System*

  This subject 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.

- *PeopleSoft Interaction Hub: Portal and Site Administration*

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

- *PeopleSoft Interaction Hub: Resource Finder*

  This subject 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.

- *PeopleSoft Interaction Hub: Using Portal Features*

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

## PeopleTools Documentation

PeopleSoft Online Help for PeopleTools contains the complete set of subject areas covering PeopleTools 8.53. In particular, several of these subjects are useful to the setup, administration, and use of PeopleSoft Interaction Hub including:

- *PeopleTools: Feed Publishing Framework*

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

- *PeopleTools: Integration Broker*

  PeopleSoft 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.

- *PeopleTools: Portal Technology*

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

- *PeopleTools: Security Administration*

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

- *PeopleTools: Applications User's Guide*

  This subject 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 subjects and others in the PeopleSoft Online Help are referenced as needed.

# PeopleSoft Portal Solutions Related Links

PeopleSoft Interaction Hub 9.1 Documentation Home Page [ID 887960.1]

PeopleSoft Information Portal

My Oracle Support

PeopleSoft Training from Oracle University

PeopleSoft Video Feature Overviews on YouTube

## Contact Us

Send us your suggestions Please include release numbers for the PeopleTools and applications that you are using.

## Follow Us

Get the latest PeopleSoft updates on Facebook.

Follow PeopleSoft on Twitter@PeopleSoft_Info.

Chapter 1

# Getting Started With PeopleSoft Interaction Hub

## PeopleSoft Interaction Hub Overview

Reviewing all elements of the PeopleSoft portal offerings helps you better understand how the PeopleSoft Interaction Hub fits within your own portal strategy. The PeopleSoft offerings focus on providing you with products that can be combined in multiple ways to produce the enterprise portal configuration that addresses your organization's requirements. The fact that the PeopleSoft Interaction Hub and PeopleSoft business applications share a common PeopleTools technology base makes integration easy. While our portal packs provide this prepackaged integration to PeopleSoft applications, you can also integrate with any web-enabled application by using the PeopleTools integration technologies.

This topic discusses each element in the overall PeopleSoft portal infrastructure:

- PeopleSoft Interaction Hub.
- PeopleTools portal technology.
- PeopleSoft portal packs.

---

**Note:** This subject area documents the functionality of the PeopleSoft Interaction Hub only. Detailed documentation for PeopleTools portal technology and the PeopleSoft portal packs is delivered separately with the respective products.

---

PeopleSoft Interaction Hub provides a selection of out-of-the-box features that enable you to quickly implement the portal. You can deploy enterprise-wide access to internet-based applications, unstructured content, a searchable resource repository, and collaborative services through an internet browser.

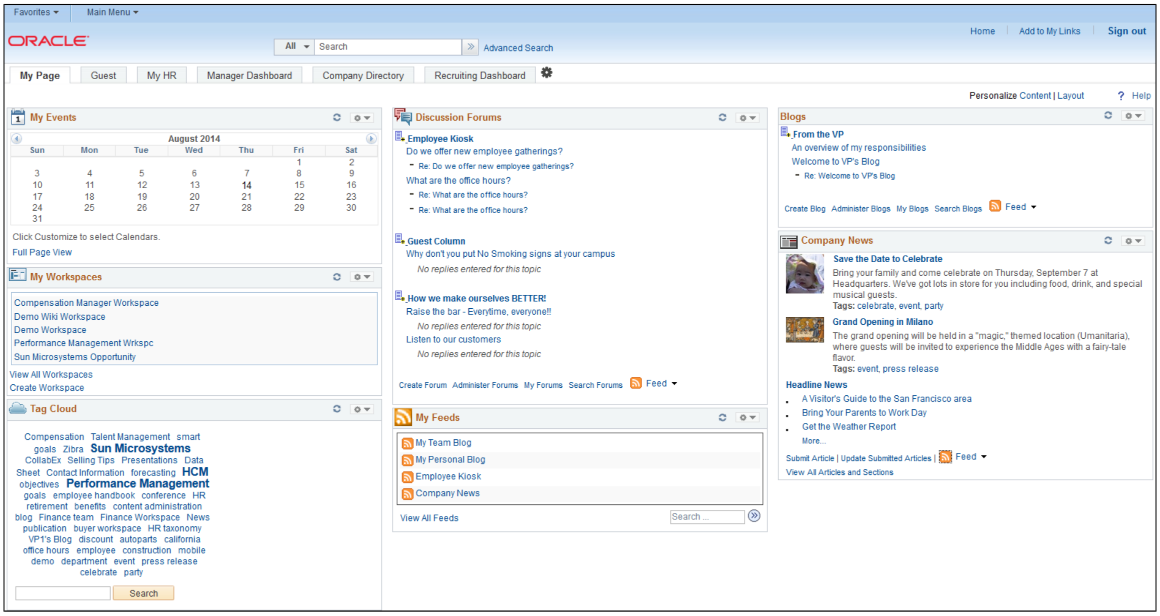
Deploying PeopleSoft Interaction Hub provides you with peace of mind, knowing that your software investment is protected against rapidly changing technology standards through our full-service support, maintenance, and upgrade programs.

# My Page Homepage Tab

### Image: My Page homepage tab

This example illustrates the My Page homepage tab of PeopleSoft Interaction Hub, which has been personalized to include multiple delivered homepage pagelets.




Users can personalize their PeopleSoft Interaction Hub homepages to display a variety of pagelets. Numerous pagelets are delivered with the PeopleSoft Interaction Hub product. See Homepage Pagelets.

The following features are available in the default homepage header of PeopleSoft Interaction Hub:

**Favorites** — Use the Favorites menu to access recently used menu items, favorites, and My Links items.

**Main Menu** — Use the cascading drop-down menu navigation to view menu folders and navigate to a menu item.

**Home** — Click to return to your default homepage tab (typically, the My Page tab).

**Add to My Links** — Click to access the Add to My Links page, where you can add a My Link to the currently accessed component of your My Links collection.

See Add to My Links Page.

**Sign out** — Click to sign out of the PeopleSoft Interaction Hub system.

**Search** — Submit a portal search request and access the Search Results page.

See Understanding Searching in the Portal.

**My Page** — Select to access My Page homepage tab.

| | |
|---|---|
| **Guest** | Select to access a homepage tab that is configured for guest users.<br><br>See "Understanding Guest User Accounts" (PeopleSoft Interaction Hub 9.1: Portal and Site Administration). |
| **My HR** | Select to access a sample tab that integrates content from PeopleSoft HCM, PeopleSoft CRM, and PeopleSoft Interaction Hub. |

Depending on the configuration of your system, other homepage tabs may be visible:

- Additional homepage tabs such as Manager Dashboard, Company Directory, and Recruiting Dashboard shown in the previous example are defined in a custom tabs navigation collection. See "Custom Tabs Navigation Collection" (PeopleSoft Interaction Hub 9.1: Branding) for more information.
- In addition, the Administration tab or the Investor tab may be enabled on your system. See the following section for more information on the Administration tab.

## Administration Homepage Tab

The Administration homepage tab displays homepage pagelets for administrative tasks.

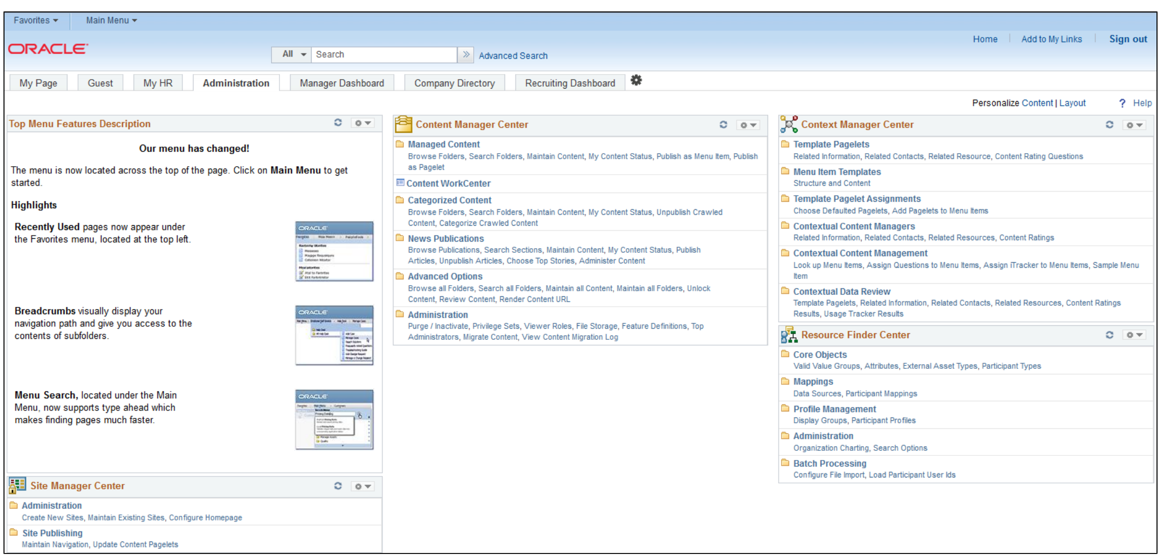
---

**Note:** The content reference definition for the Administration tab is delivered as disabled. See"Managing Homepage Tabs through the Portal Registry" (PeopleSoft Interaction Hub 9.1: Portal and Site Administration) for more information on enabling the Administration tab.

---

**Image: Administration homepage tab**

The following example illustrates the Administration homepage tab, which displays pagelets for administrative tasks.




These homepage pagelets display the same content as the navigation collection pages that appear as menu items under the Portal Administration menu:

- Site Manager Center.

See Understanding PeopleSoft Interaction Hub-Delivered Pagelets.

- Content Management Center.

  See "Understanding Managed Content" (PeopleSoft Interaction Hub 9.1: Content Management System).

- Context Manager Center.

  ---

  **Important!** As of PeopleSoft Interaction Hub 9.1 Revision 2 and PeopleTools 8.53, the Context Manager feature and associated pagelets have been deprecated. The PeopleSoft Related Content Framework provides a broader and more flexible framework for contextually related content.

  ---

  See Context Manager Center Pagelet.

- Resource Finder Center.

  See "Understanding PeopleSoft Interaction Hub Resource Finder" (PeopleSoft Interaction Hub 9.1: Resource Finder).

Similar to any homepage tab, users can select which pagelets appear by personalizing content for their Administration homepage tab.

## PeopleTools Portal Technology

All PeopleSoft applications are developed using PeopleTools application development technology. PeopleTools, an object-oriented development environment, allows for the rapid and efficient development of applications by storing application design as metadata. The PeopleTools development and runtime environment includes the basic technology features on which PeopleSoft Interaction Hub is built.

## PeopleSoft Portal Packs

PeopleSoft portal packs are a convenient packaging of pagelets that provide access to content from the corresponding PeopleSoft application. PeopleSoft portal packs are *optional products* and *are not required* to access data from a licensed PeopleSoft application.

---

**Note:** WorkCenters and dashboards delivered in PeopleSoft application databases along with the pagelet import feature of the unified navigation framework provide alternative mechanisms for accessing content from PeopleSoft application databases.

---

This table lists *optional* PeopleSoft portal pack products:

| ***Product*** | ***PeopleSoft Application*** |
|---|---|
| PeopleSoft ALM Portal Pack | PeopleSoft FSCM |
| PeopleSoft CRM Portal Pack | PeopleSoft CRM |
| PeopleSoft EPM Portal Pack | PeopleSoft EPM |
| PeopleSoft ESA Portal Pack | PeopleSoft FSCM |

| **Product** | **PeopleSoft Application** |
|---|---|
| PeopleSoft Financials Portal Pack | PeopleSoft FSCM |
| PeopleSoft HCM Portal Pack | PeopleSoft HCM |
| PeopleSoft Supply Chain Portal Pack | PeopleSoft FSCM |

# PeopleSoft Interaction Hub Integrations

PeopleSoft Interaction Hub can integrate with all of the following:

- PeopleSoft applications.
- Non-PeopleSoft applications.
- Third-party internet services.
- Internet content.
- Extranet content.
- Intranet content.

# PeopleSoft Interaction Hub Implementation Tasks

PeopleSoft Setup Manager enables you to generate a list of setup tasks for your organization based on the features that you are implementing. The setup tasks include the components that you must set up, listed in the order in which you must enter data into the component tables, and links to the corresponding PeopleBook documentation.

## Other Sources of Information

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, table-loading sequences, data models, and business process maps.

See the product documentation for

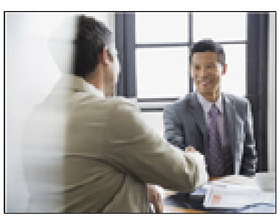
*PeopleTools: Setup Manager*

# Using Third-Party Images Provided with Sample Data

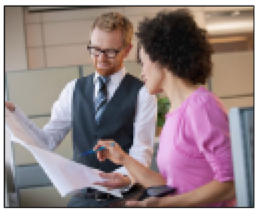
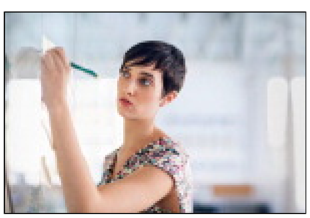
The PeopleSoft Interaction Hub demo database includes sample images that are provided under a restricted use license for demonstration purposes only, such as product demonstrations and conference room pilots. The specific images are listed below. If you want to use these sample images in a production environment, you must contact the image owners directly to purchase the images. You can find contact information for the owners in Licensing Notes for Oracle's PeopleTools 8.54, Document 1905898.1 on My Oracle Support.

Oracle does not provide a license for you to use the sample images in your production environments or for other non-demonstration uses.

| ***Image*** | ***Content ID (in PS91 Database)*** | ***Where Used*** | ***Owner*** | ***Owner's Media ID for Image*** |
|---|---|---|---|---|
|  | 1155 | My HR homepage tab | Corbis | 42-47299349 |
|  | 1156 | My HR homepage tab | Getty | 79670128 |
|  | 1712 | Company News tile | Getty | 485209613 |
|  | 1713 | Company News tile | Getty | 452760723 |
|  | 1714 | Company News tile | Getty | 184827434 |
|  | 1715 | Company News tile | Corbis | 42-57166951 |

| ***Image*** | ***Content ID (in PS91 Database)*** | ***Where Used*** | ***Owner*** | ***Owner's Media ID for Image*** |
|---|---|---|---|---|
|  | 1716 | Company News tile | Getty | 454983451 |
|  | 1717 | Company News tile | Corbis | 42-39352088 |
|  | 1718 | Company News tile | Corbis | 42-33029280 |
|  | 1720 | Company News tile | Corbis | FAN9003734 |
|  | 1721 | Company News tile | Getty | 175137889 |
|  | 1722 | Company News tile | Corbis | 42-39351359 |

Chapter 2

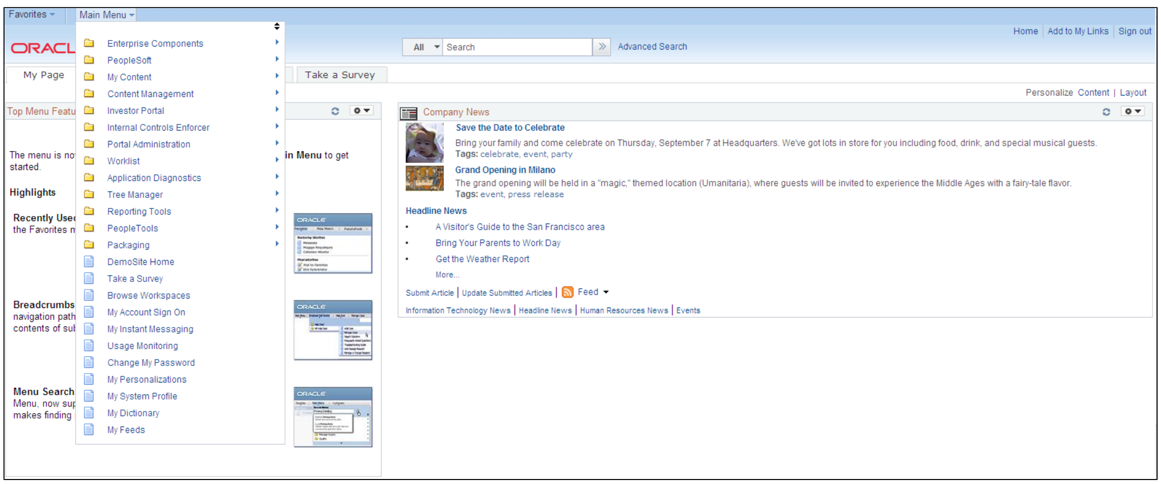
# Using and Personalizing Your Portal Homepage

## Understanding Your Portal Homepage

**Image: PeopleSoft Interaction Hub homepage**

Your portal homepage aggregates a variety of content gathered from sources across your organization. This content is organized by tabs, is presented in pagelets, and can be accessed through menu navigation and links.

The following example illustrates the PeopleSoft Interaction Hub homepage.




These features are available on the PeopleSoft Interaction Hub homepage header:

| | |
|---|---|
| **Home** | Click to return to your PeopleSoft Interaction Hub homepage ( the My Page tab). |
| **Worklist** | Click to access your worklist.<br>See the product documentation for *PeopleTools: Applications User's Guide*, “Using Workflow.” |
| **Resource Finder** | Click to access the Resource Finder - Advanced Search page on which you can perform detailed searches for resources in your enterprise and access relevant resource profiles.<br>See "Performing Advanced Resource Finder Searches" (PeopleSoft Interaction Hub 9.1: Resource Finder). |
| **MultiChannel Console** | Click to launch the MultiChannel console. |

See the product documentation for *PeopleTools: MultiChannel Framework*, "Understanding PeopleSoft MultiChannel Framework."

**Search**

Submit a portal search request and access the Search page.

See "Understanding Search Indexes" (PeopleSoft Interaction Hub 9.1: Portal and Site Administration).

**Add to My Links**

Click to access the Add to My Links modal window on which you can add a link to the current page.

See Add to My Links Page.

**Main Menu**

Use the cascading drop-down menu navigation to view menu folders and navigate to a menu item.

**My Page, Guest, Investor, or Adminstration**

Select a tab to view the pagelets configured for that homepage tab.

**My Links**

Click to access the View My Links page.

See View My Links Page.

The My Links drop-down menu is available only on the collaborative workspace homepage; not on the portal homepage. See Understanding My Links.

**Content**

Click to access the Personalize Content: <Tab Name> page on which you can select pagelets to display on your portal homepage.

**Layout**

Click to access the Personalize Layout: <Tab Name> page on which you can select pagelets to display on your portal homepage.

## Common Elements Used in PeopleSoft Interaction Hub Pagelets

Click the Minimize button in the pagelet title bar to minimize the pagelet area.

Click the Expand button in the pagelet title bar to expand the pagelet area.

The Customize button displays in the pagelet title bar of a pagelet that supports personalization.

Click the Customize button to access a personalization page for the pagelet.

| | |
|---|---|
| | **Note:** The personalization option for default pagelets does not appear until you click the Content or Layout link on homepage to personalize the tab on which the pagelet resides. |
|  | Click the Refresh button in the pagelet title bar to refresh the data displayed on the pagelet. |
|  | Click the Remove button in the pagelet title bar to remove the pagelet from the homepage. |
|  | Click the Help button in the pagelet title bar to view the PeopleBooks help associated with this pagelet. |

## Personalizing Your Homepage Content

You can configure your portal homepage to display a variety of pagelets in a layout that suits your needs. Numerous pagelets are delivered with the PeopleSoft Interaction Hub product for your use.

Access the Personalize Content page (click the Content link on the homepage tab that you want to personalize).

**Image: Personalize Content page (My Page tab)**

You can configure your portal homepage to display a variety of pagelets in a layout that suits your needs. Numerous pagelets are delivered with the PeopleSoft Interaction Hub product for your use.

The following example illustrates the Personalize Content page (My Page tab).


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

To select pagelets for your portal homepage:

1. Enter the name for the tab in the Tab Name field.
2. Enter an optional welcome message in the Welcome Message field.
3. Select the check box for each pagelet that you want to display on your homepage.

   **Note:** The pagelets are organized by the folders in which they are stored in the portal registry.

4. Do one of the following:
   - To return to the portal homepage with the pagelets arranged in their default columns and in a default order, click the Save button.
   - To specify the layout of the pagelets, click the Personalize Layout link.

See the product documentation for *PeopleTools: Portal Technology*

## Personalizing Your Homepage Layout

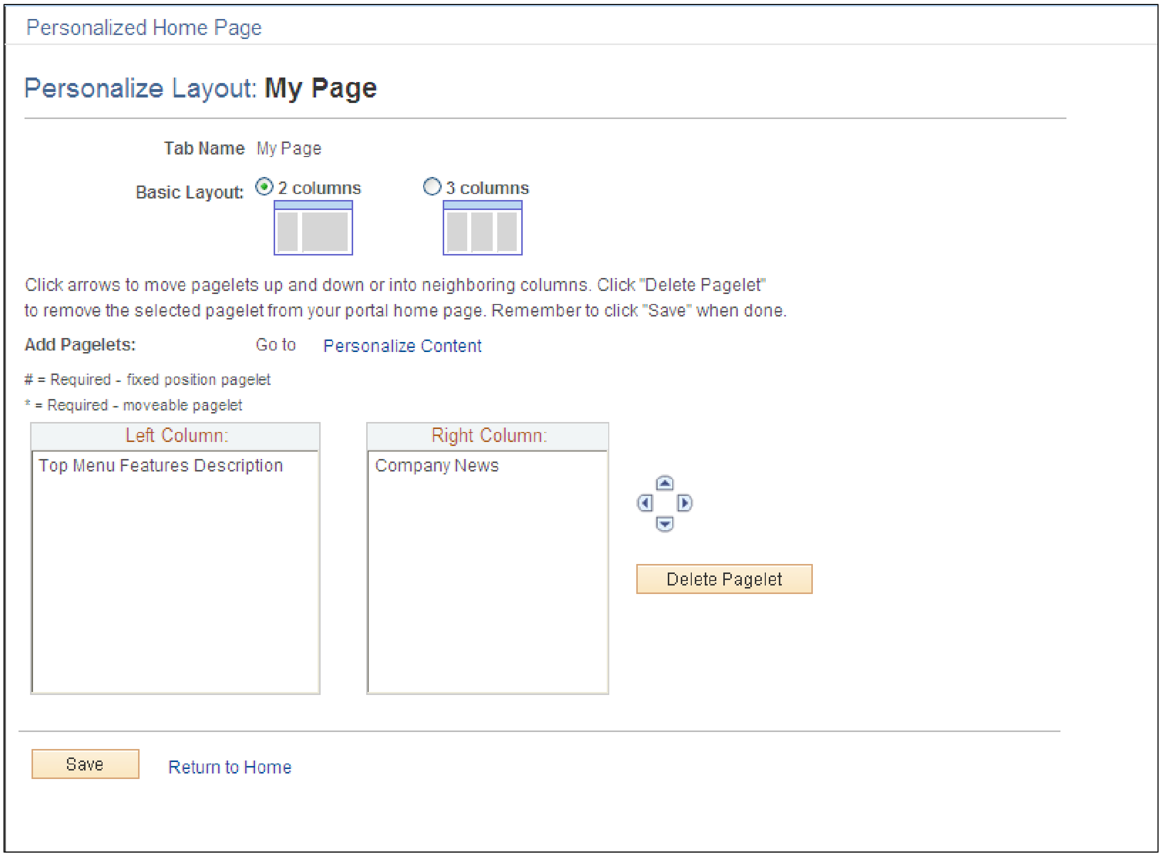
Use either of these two methods to modify the layout of your portal homepage:

- Move pagelets on the Personalize Layout page.
- Drag and drop pagelets on the portal homepage.

## Personalize Layout Page

**Image: Personalize Layout page (My Page tab)**

The following example illustrates the Personalize Layout Page (My Page tab). Access the Personalize Layout Page (click the Layout link on the homepage tab that you want to personalize) as shown below.




Use the Personalize Layout page to designate the layout of content on the homepage tab.

**Tab Name**

Displays the name of this tab as specified on the Personalize Content page.

**Basic Layout**

Select to display the pagelets in either two or three columns on the portal homepage.

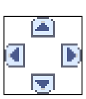
**Personalize Content**

Click to access the Personalize Content page to add or delete pagelets

**Left Column, Center Column, and Right Column**

Displays the pagelets selected on the Personalize 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.



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 homepage tab. |
| **Save** | Click to save your changes and return to the portal homepage. |

See the product documentation for *PeopleTools: Portal Technology*

## Dragging and Dropping Pagelets on the Portal Homepage

You can also rearrange pagelets on the portal 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.

See the product documentation for *PeopleTools: Applications User's Guide*

Chapter 3

# Understanding PeopleSoft Interaction Hub-Delivered Pagelets

## Understanding PeopleSoft Interaction Hub-Delivered Pagelets

The PeopleSoft Interaction Hub pagelets discussed in the topic Home pagelets can be classified into one of the following pagelet types:

- Homepage pagelets

  Homepage pagelets are primarily selected and laid out by the user and appear on the user's homepage.

  Users can configure their portal homepages with three narrow columns or one narrow and one wide column. Some pagelets have both a narrow and a wide version, each with its own object name. When this documentation provides two object names for a pagelet, the first one refers to the narrow version.

- Workspace pagelets

  Workspace pagelets are determined by the workspace template and can be configured by a workspace administrator.

  Workspace administrators can configure workspace homepages with three narrow columns or one narrow and one wide column.

- Template pagelets

  Template pagelets are configured by a portal administrator and appear in the menu frame on the right side of a destination target page.

Oracle provides a table for each of these pagelet types that provides the following information about the pagelets:

- The pagelet name.
- A pagelet description.
- The functional role of the person who would typically use the pagelet.
- The pagelet's enabling feature.

**Note:** The enabling feature provides the data that appears on the pagelet. If you do not implement the enabling feature, the pagelet does not work as designed.

# Homepage Pagelets

The following table lists the homepage pagelets delivered with PeopleSoft Interaction Hub:

| ***Pagelet Name*** | ***Description*** | ***Enabling Feature*** | ***Delivered Permission List*** |
|---|---|---|---|
| Blogs | Displays user-selected blogs with most recent posts and comments.<br><br>This pagelet can be personalized.<br><br>See Working With the Blogs Pagelet. | Blogs<br><br>See Understanding Blogs. | PAPP4800<br><br>PAPP5700<br><br>PAPP9000 |
| Calendar Events | Enables employees to access calendar information without leaving the portal.<br><br>This pagelet can be personalized.<br><br>See Working With the Calendar Events Pagelet. | Calendar integration<br><br>See "Setting Up Additional Mail Systems" (PeopleSoft Interaction Hub 9.1: Portal and Site Administration) | PAPP1300<br><br>PAPP9000 |
| Company Promotions | Enables you to promote transactions so that users can link to specific transactions or URLs in your system.<br><br>This pagelet can be personalized.<br><br>Appropriate for guests.<br><br>See "Personalize Company Promotions Page" (PeopleSoft Interaction Hub 9.1: Content Management System). | Company Promotions<br><br>See "Understanding Company Promotions" (PeopleSoft Interaction Hub 9.1: Content Management System) | PAPP1110<br><br>PAPP9000 |
| Content Manager Center | Provides a navigational guide to configure and use Content Management features.<br><br>Created using Navigation Collections with its definition stored in Pagelet Wizard tables. | Content Management<br><br>See "Understanding Managed Content" (PeopleSoft Interaction Hub 9.1: Content Management System) | PAPP2010<br><br>PAPP2020<br><br>PAPP2025<br><br>PAPP2045<br><br>PAPP2050<br><br>PAPP2070<br><br>PAPP2080<br><br>PAPP9000 |

| ***Pagelet Name*** | ***Description*** | ***Enabling Feature*** | ***Delivered Permission List*** |
|---|---|---|---|
| Context Manager Center | Provides a navigational guide to configure and use Context Manager features.<br><br>Created using Navigation Collections with its definition stored in Pagelet Wizard tables.<br><br>See Context Manager Center Pagelet. | Context Manager | PAPP4300<br><br>PAPP4350<br><br>PAPP4600<br><br>PAPP4680<br><br>PAPP4700<br><br>PAPP4710<br><br>PAPP4855<br><br>PAPP9000 |
| Demo | Provides example code for creating a simple component-based pagelet. | Not applicable. | PAPP9999<br><br>PAPP9000 |
| Discussion Forums | Displays user-selected discussion forums with most recent topics and replies.<br><br>This pagelet can be personalized.<br><br>See Working With the Discussion Forums Pagelet. | Discussion forums<br><br>See Understanding Discussion Forums. | PAPP4800<br><br>PAPP9000 |
| Discussion Posts | Displays topics and replies from workspace discussions only.<br><br>This pagelet can be personalized.<br><br>See Working With the Discussion Posts Pagelet. | Workspace discussions<br><br>See "Using the Discussions Module" (PeopleSoft Interaction Hub 9.1: Collaborative Workspaces). | PAPP4800<br><br>PAPP9000 |
| Email | Enables employees to access email without leaving the portal.<br><br>This pagelet can be personalized.<br><br>See Working With the Email Pagelet. | Email integration<br><br>See "Setting Up on the Third-Party Side" (PeopleSoft Interaction Hub 9.1: Portal and Site Administration). | PAPP1300<br><br>PAPP9000 |

| ***Pagelet Name*** | ***Description*** | ***Enabling Feature*** | ***Delivered Permission List*** |
|---|---|---|---|
| Feed Reader | Provides access to feed headlines and articles directly from the PeopleSoft Interaction Hub. | Web proxy server<br><br>See the product documentation for *PeopleTools: Integration Broker Administration*, "Using Listening Connectors and Target Connectors," Working With the HTTP Connectors, Running Integration Gateways Behind Proxy Servers. | PAPP1000<br><br>PAPP9000 |
| Language Selection | Allows you to change the displayed language without having to access the language options on the sign-in page.<br><br>This pagelet is useful for guest users, who may never see the sign-in page, as well as for users who are already logged into the database.<br><br>Appropriate for guests.<br><br>See Working With the Language Selection Pagelet. | No special setup is required. All languages enabled for the application database are available for selection.<br><br>The pagelet can be extended to support any languages as long as the translated data is available. | PAPP0000<br><br>PAPP9000 |
| My Events | Displays all of the events, action items, and tasks a user has access to across portals and sites.<br><br>This pagelet can be personalized.<br><br>See Working With the My Events Pagelet. | Community calendars<br><br>See Using Community Calendars. | PAPP1210<br><br>PAPP9000 |
| My Feeds | Allows you to view a list of feeds published within PeopleSoft Interaction Hub to which you have access.<br><br>See Personalize My Feeds Page. | Feed publishing must be enabled and feeds published within the system.<br><br>See Publishing PeopleSoft Interaction Hub Content as a Feed. | PAPP0002<br><br>PAPP9000 |

| ***Pagelet Name*** | ***Description*** | ***Enabling Feature*** | ***Delivered Permission List*** |
|---|---|---|---|
| My Managed Content | Provides one-click access to your favorite Managed Content folders, as well as content status summaries and counts of the number of items in each status.<br><br>This pagelet can be personalized.<br><br>See "Working With the My Managed Content Pagelet" (PeopleSoft Interaction Hub 9.1: Content Management System). | Managed Content<br><br>See "Working With the My Managed Content Pagelet" (PeopleSoft Interaction Hub 9.1: Content Management System). | PAPP1140<br><br>PAPP9000 |
| My News Content | Serves as an inbox for news content users, managers, and publishers providing them visibility and quick access to articles requiring their attention.<br><br>See "My News Content Pagelet" (PeopleSoft Interaction Hub 9.1: Content Management System). | News Publications<br><br>See "Setting Up News Publications" (PeopleSoft Interaction Hub 9.1: Content Management System) | PAPP1150<br><br>PAPP9000 |
| My Workspaces | Provides access to the collaborative workspaces to which you belong.<br><br>See "My Workspaces Page" (PeopleSoft Interaction Hub 9.1: Collaborative Workspaces). | Collaborative workspaces<br><br>See "Collaborative Workspaces" (PeopleSoft Interaction Hub 9.1: Collaborative Workspaces). | PAPP5300 |
| News publication (pagelet name is defined by the pagelet publisher)<br><br>The Company News pagelet delivered with PeopleSoft Interaction Hub is an example of a news publication pagelet. | You can set up multiple internal news publication pagelets targeted at different audiences. The pagelet presents links to articles and displays top story summaries and images.<br><br>This pagelet can be personalized.<br><br>Appropriate for guests.<br><br>See "Company News Pagelet" (PeopleSoft Interaction Hub 9.1: Content Management System). | News Publications<br><br>See "Setting Up News Publications" (PeopleSoft Interaction Hub 9.1: Content Management System). | PAPP1100 |

| ***Pagelet Name*** | ***Description*** | ***Enabling Feature*** | ***Delivered Permission List*** |
|---|---|---|---|
| Pagelet Wizard-generated pagelets | Pagelet Wizard allows you to create and register a pagelet integrating and transforming data from a wide variety of data sources, both internal and external to PeopleSoft applications.<br><br>Pagelets created using Pagelet Wizard may be configured to include personalization options.<br><br>May be appropriate for guests. | Pagelet Wizard<br><br>See the product documentation for *PeopleTools: Portal Technology*, “Using Pagelet Wizard to Create and Manage Pagelets.” | Pagelet Wizard enables you to create a pagelet with security definitions. |
| Promotions by Role | Enables promotion managers to quickly verify which promotions are currently appearing for a particular portal viewer role.<br><br>There is no stored personalization for this pagelet, but it does allow an input parameter.<br><br>See "Promotions by Role Pagelet" (PeopleSoft Interaction Hub 9.1: Content Management System). | Company Promotions<br><br>See "Setting Up Company Promotions" (PeopleSoft Interaction Hub 9.1: Content Management System). | PAPP1130<br><br>PAPP9000 |
| Related Discussion Forums | Displays discussion forums, topics, and replies from the Related Discussion service.<br><br>See Working with the Related Discussion Forums Pagelet. | Related Discussion service<br><br>See Working With the Related Discussion Pagelet. | PAPP4800<br><br>PAPP9000 |
| Resource Finder | Provides immediate access to the basic search capabilities of Resource Finder, all from any portal homepage tab.<br><br>Appropriate for guests.<br><br>See "Using the Resource Finder Pagelet" (PeopleSoft Interaction Hub 9.1: Resource Finder). | Resource Finder<br><br>See "Performing Advanced Resource Finder Searches" (PeopleSoft Interaction Hub 9.1: Resource Finder). | PAPX1000<br><br>PAPX9000 |
| Resource Finder Center | Provides a navigational guide to configure and use Resource Finder features.<br><br>Created using Navigation Collections with its definition stored in Pagelet Wizard tables. | Resource Finder<br><br>See "Understanding PeopleSoft Interaction Hub Resource Finder" (PeopleSoft Interaction Hub 9.1: Resource Finder). | PAPX2050<br><br>PAPX2060<br><br>PAPX1070<br><br>PAPX9000 |

| ***Pagelet Name*** | ***Description*** | ***Enabling Feature*** | ***Delivered Permission List*** |
|---|---|---|---|
| Saved Searches | Allows you to define your frequently performed searches and rerun them quickly the next time by clicking a link on the pagelet.<br><br>This pagelet can be personalized. | Search | PAPP1600<br><br>PAPP9000 |
| Signon | Enables users to switch from a GUEST user account to their own user account.<br><br>Appropriate for guests.<br><br>See Working With the Signon Pagelet. | Guest User Account<br><br>See "Understanding Guest User Accounts" (PeopleSoft Interaction Hub 9.1: Portal and Site Administration). | PAPP0001<br><br>PAPP9000 |
| Site Manager Center | Provides a navigational guide to configure and use the Site Management features.<br><br>Created using Navigation Collections with its definition stored in Pagelet Wizard tables.<br><br>See "Understanding Site Management" (PeopleSoft Interaction Hub 9.1: Portal and Site Administration). | Site Management<br><br>See "Understanding Site Creation and Management" (PeopleSoft Interaction Hub 9.1: Portal and Site Administration). | PAPP5000<br><br>PAPP5050<br><br>PAPP5060<br><br>PAPP5070 |
| Submitted Promotions | Provides promotion managers visibility into the status of and quick access to their submitted promotions.<br><br>See "Submitted Promotions Pagelet" (PeopleSoft Interaction Hub 9.1: Content Management System). | Company Promotions<br><br>See "Understanding Company Promotions" (PeopleSoft Interaction Hub 9.1: Content Management System). | PAPP1160<br><br>PAPP9000 |
| Tasks | Enables you to keep track of your workflow tasks and personal reminders across your business solutions.<br><br>This pagelet can be personalized.<br><br>See Working With the Tasks and Tasks Pagelet. | Integrated Task List<br><br>See "Understanding Integrated Task List Integration Setup" (PeopleSoft Interaction Hub 9.1: Portal and Site Administration). | PAPP1200<br><br>PAPP9000 |

| ***Pagelet Name*** | ***Description*** | ***Enabling Feature*** | ***Delivered Permission List*** |
|---|---|---|---|
| User Logon Statistics | View monthly logon data, including logon dates, times, and user IDs.<br><br>Appropriate for portal administrators.<br><br>See Working With the User Logon Statistics Pagelet. | Portal Logon Statistics<br><br>See "Enabling the Signon PeopleCode" (PeopleSoft Interaction Hub 9.1: Portal and Site Administration). | PAPP4200<br><br>PAPP9000 |
| Web Magazine | Provides access to web magazine publication issues.<br><br>Appropriate for guests.<br><br>See "Working With the Web Magazine Pagelet" (PeopleSoft Interaction Hub 9.1: Content Management System). | Web Magazines<br><br>See "Understanding Web Magazine iScripts" (PeopleSoft Interaction Hub 9.1: Content Management System) | PAPP1120<br><br>PAPP9000 |

# Workspace Pagelets

The following table lists the pagelets delivered with PeopleSoft Interaction Hub for display on a collaborative workspace homepage.

| ***Pagelet Name*** | ***Description*** | ***Enabling Feature*** |
|---|---|---|
| Blogs | Members can monitor recent blog postings and comments using the Blogs pagelet.<br><br>See "Working With the Blogs Pagelet" (PeopleSoft Interaction Hub 9.1: Collaborative Workspaces). | Blogs module<br><br>See "Using the Blogs Module" (PeopleSoft Interaction Hub 9.1: Collaborative Workspaces). |
| Calendar | Shows all of the events a user has access to across portals, sites, and workspaces.<br><br>This pagelet can be personalized.<br><br>See "Working With the Calendar Pagelet" (PeopleSoft Interaction Hub 9.1: Collaborative Workspaces). | Calendar module<br><br>See "Using the Calendar Module" (PeopleSoft Interaction Hub 9.1: Collaborative Workspaces). |
| Links | Displays a collection of useful links related to a collaborative workspace.<br><br>See "Working With the Links Pagelet" (PeopleSoft Interaction Hub 9.1: Collaborative Workspaces). | Links module<br><br>See "Using the Links Module" (PeopleSoft Interaction Hub 9.1: Collaborative Workspaces). |

| ***Pagelet Name*** | ***Description*** | ***Enabling Feature*** |
|---|---|---|
| Open Action Items | Displays a list of all open action items for the workspace.<br><br>See "Working With the Open Action Items Pagelet" (PeopleSoft Interaction Hub 9.1: Collaborative Workspaces). | Action Item Lists module<br><br>See "Using the Action Item Lists Module" (PeopleSoft Interaction Hub 9.1: Collaborative Workspaces). |
| Poll | Use the Poll pagelet to show a single question or poll in a pagelet and enable users to add comments and see other responses to the poll.<br><br>See "Using the Poll Pagelet" (PeopleSoft Interaction Hub 9.1: Collaborative Workspaces). | Polls module<br><br>See "Using the Polls Module" (PeopleSoft Interaction Hub 9.1: Collaborative Workspaces). |
| Recent Discussions | Members can monitor recent discussion topics and replies using the Recent Discussions pagelet.<br><br>See "Using the Recent Discussions Pagelet" (PeopleSoft Interaction Hub 9.1: Collaborative Workspaces). | Discussions module<br><br>See "Using the Discussions Module" (PeopleSoft Interaction Hub 9.1: Collaborative Workspaces). |
| Recent Documents | Members can monitor recently added or changed documents using the Recent Documents pagelet.<br><br>See "Working With the Recent Documents Pagelet" (PeopleSoft Interaction Hub 9.1: Collaborative Workspaces). | Documents module<br><br>See "Using the Documents Module" (PeopleSoft Interaction Hub 9.1: Collaborative Workspaces). |
| Tags | Members can view and edit workspace-level tags.<br><br>See "Using the Tags Pagelet" (PeopleSoft Interaction Hub 9.1: Collaborative Workspaces). | Workspace homepage<br><br>See "Creating and Using Tags in Workspaces" (PeopleSoft Interaction Hub 9.1: Collaborative Workspaces). |
| Upcoming Events | Displays a list upcoming events for the workspace.<br><br>See "Working with the Upcoming Events Pagelet" (PeopleSoft Interaction Hub 9.1: Collaborative Workspaces). | Calendar module<br><br>See "Using the Calendar Module" (PeopleSoft Interaction Hub 9.1: Collaborative Workspaces). |
| Welcome | Displays a welcome message from the workspace administrator.<br><br>See "Administering the Workspace Properties Page" (PeopleSoft Interaction Hub 9.1: Collaborative Workspaces). | Welcome module<br><br>See "Administering Workspace Modules" (PeopleSoft Interaction Hub 9.1: Collaborative Workspaces). |

| Pagelet Name | Description | Enabling Feature |
|---|---|---|
| Wiki Content | Displays the wiki content.<br><br>See "Working With the Wiki Content Pagelet" (PeopleSoft Interaction Hub 9.1: Collaborative Workspaces). | Wiki Content module<br><br>See "Using the Wiki Content Module" (PeopleSoft Interaction Hub 9.1: Collaborative Workspaces). |

# Template Pagelets

The following table lists the template pagelets delivered with PeopleSoft Interaction Hub. The pagelets are discussed in the final topics of this book:

**Note:** Template pagelets cannot be personalized.

| Pagelet Name | Description | Enabling Feature | Delivered Permission List |
|---|---|---|---|
| Content Ratings | Displays links to questions set up for an associated menu item target page. Authorized users can also view summarized rating responses.<br><br>See Working With the Content Ratings Pagelet. | Content Ratings<br><br>See Understanding Context Manager. | PAPP0000<br><br>Controlled by the permission list on the related target CREF. |
| Related Contacts | Displays contacts that are relevant to the associated menu item. Provides email and instant messaging functionality that can be used to reach the related contacts.<br><br>Appropriate for Guests, if guests are allowed access to the menu item.<br><br>See Working With the Related Contacts Pagelet. | Context Manager<br><br>See Understanding Context Manager. | PAPP0000<br><br>Controlled by the permission list on the related target CREF |
| Related Information | Display links to content relevant to an associated menu item.<br><br>Appropriate for Guests, if guests are allowed access to the menu item.<br><br>See Working With the Related Information Pagelet. | Context Manager<br><br>See Understanding Context Manager.<br><br>Content Management<br><br>See Understanding Context Manager. | PAPP0000<br><br>Controlled by the permission list on the related target CREF. |

| ***Pagelet Name*** | ***Description*** | ***Enabling Feature*** | ***Delivered Permission List*** |
|---|---|---|---|
| Related Discussions | Display links to discussion forums relevant to an associated menu item.<br><br>See Working With the Related Discussion Pagelet. | Context Manager<br><br>See Understanding Context Manager. | PAPP0000<br><br>Controlled by the permission list on the related target CREF. |
| Related Resources | Provides access to resources related to an associated menu item. These resources are configured and stored in the Resource Finder feature.<br><br>Appropriate for guests.<br><br>See Working With the Related Resources Pagelet. | Context Manager<br><br>See Understanding Context Manager.<br><br>Resource Finder<br><br>See "Understanding PeopleSoft Interaction Hub Resource Finder" (PeopleSoft Interaction Hub 9.1: Resource Finder). | PAPX0000<br><br>Controlled by the permission list on the related target CREF. |
| Related Workspaces | Enables immediate access to all workspaces that you have access to that are related to that transaction page.<br><br>See Working With the Related Workspaces Pagelet. | Context Manager<br><br>See Understanding Context Manager. | |

## Related Links

Understanding Context Manager

## Chapter 4

# Working With Homepage Pagelets

## Working With the Feed Reader Pagelet

This topic discusses how to personalize and use the Feed Reader pagelet.

### Page Used to Personalize the Feed Reader Pagelet

| *Page Name* | *Definition Name* | *Usage* |
|---|---|---|
| Personalize Feed Reader Page | EO_PE_RSS_NEWS | Specify URLs to feed content that you want to display on the Feed Reader pagelet. Define display pagelet options. |

### Understanding the Feed Reader Pagelet

A feed—also known as an RSS feed, an XML feed, syndicated content, or a web feed—is frequently updated content published by a website. Particularly suitable for listing news headlines and content, feeds have been adopted by content providers to supply users with a sampling of the content available on their websites.

The Feed Reader pagelet provides the following features:

- News feed title, a link back to the source website, and an optional image or logo.
- Item (article) titles and optional summaries with links to the associated articles on the source website.
- Optional capability to search for content on the source website.

---

**Note:** The Feed Reader pagelet currently supports news feeds supplied in the RSS 0.9x, RSS 1.x, RSS 2.x, ATOM 0.3 and ATOM 1.x formats.

---

The news categories and headlines display as links. Each category displays the most recent news headlines. Select the news category link to access a page that lists all headlines in the category.

If the content source provides search capability in their content and you have configured your Feed Reader pagelet to display search functionality, you can use available search fields on the pagelet to enter keywords to execute searches in the source website. Search results display on the source website.

In addition to external feed sources, the Feed Reader pagelet can be configured to display PeopleSoft feeds such as feeds published from PeopleSoft Interaction Hub content or PeopleTools content.

This homepage pagelet may also be placed on the homepage of a collaborative workspace.

## Personalize Feed Reader Page

Use the Personalize Feed Reader page (EO_PE_RSS_NEWS) to specify URLs to feed content that you want to display on the Feed Reader pagelet.

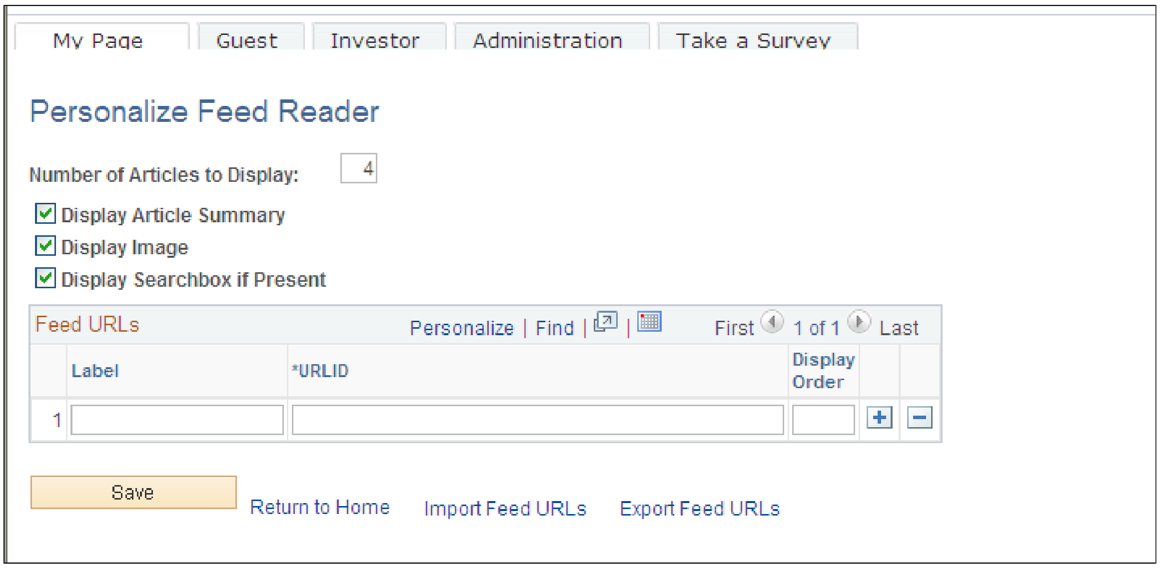
Define display pagelet options.

**Navigation**

Click the Customize icon on the Feed Reader pagelet.

**Image: Personalize Feed Reader page**

The following example illustrates the Personalize Feed Reader page.




**Number of Articles to Display**

Indicate the number of articles (items) to display per feed.

**Display Article Summary**

Indicate whether the article summaries are to be displayed by default.

**Display Image**

Indicate whether to display feed icons or logos if they are provided by the content publisher.

**Display Searchbox if Present**

Indicate whether to display a search box if the content publisher provides feed search capability.

**Label**

Enter text to be used to label the feed in the pagelet as well as in the exported feed subscription files.

The Label field is optional and if left blank, will default to the feed title when the page is saved.

**URL**

Enter a valid feed URL.

If the specified URL does not return a valid feed document, the following error message is displayed when the page is saved:

```
A feed URL is missing, or the system was unable to
retrieve a valid feed document of supported format
```

from the specified url.

**Display Order** Indicate the order to display feeds in the pagelet.

**Import Feed URLs** Click to upload an Outline Processor Markup Language ( OPML) file. OPML is an XML format for storing outlines including lists of feeds.

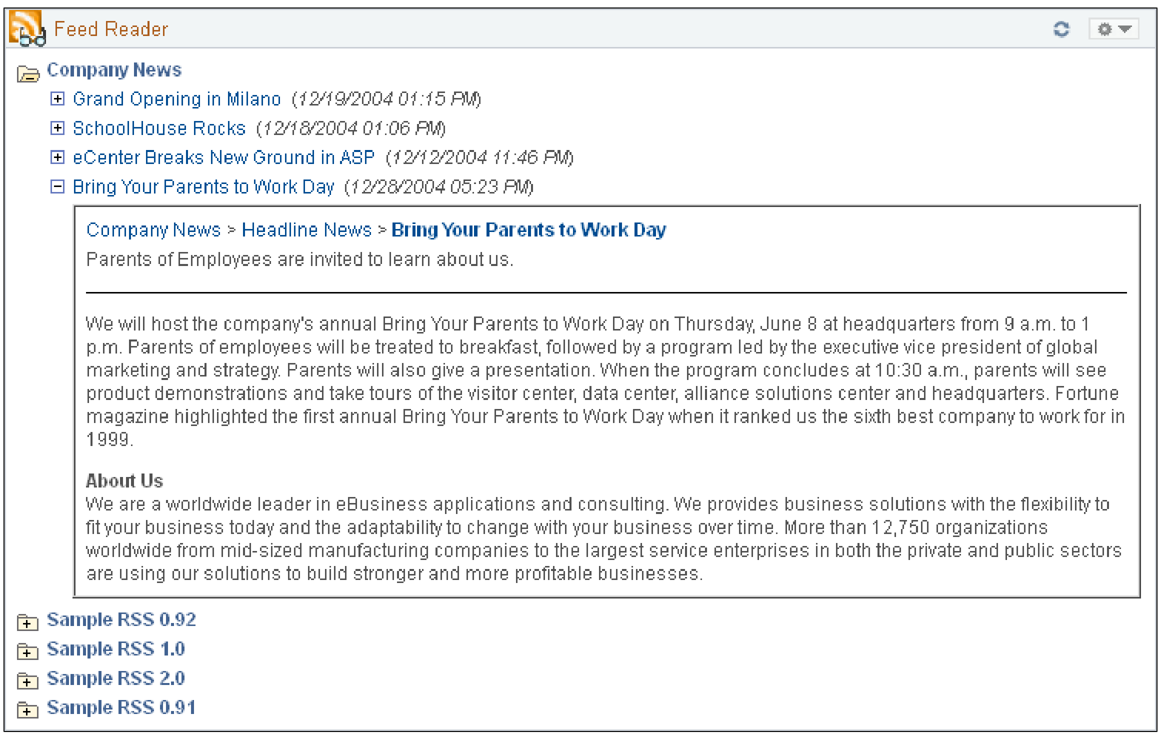
The OPML format has become popular for users to exchange subscription lists among various feed readers and feed aggregators.

**Export Feed URLs** Click export all feed URLs to a .opml file in the OPML 2.0 format.

## Feed Reader pagelet on the portal homepage

**Image: Feed Reader pagelet**

The following example illustrates the Feed Reader pagelet on the portal homepage. Access the Feed Reader pagelet on the portal homepage as shown below.




Use the Feed Reader pagelet to access feeds and feed articles directly from the PeopleSoft Interaction Hub. For each feed, a folder icon shows first, followed by the feed label and the feed description. For each feed item (article), an item icon shows first, followed by the item title and summary.

 Click this folder button to show the content for the feed.

All feeds show initially in collapsed state, except the first feed, which shows in expanded state.

| | |
|---|---|
|  | Click this folder button to hide the content for the feed. |
|  | Click this item button to show the summary for the article.<br><br>**Note:** If a dot icon appears, that means the article does not have a summary. |
|  | Click this item button to hide the summary for the article. |
| **<Feed Title>** | Click the link for a feed title to open the entire feed document within PeopleSoft Interaction Hub. |
| **<Item Title>** | Click a link for an item title to display the feed item in the target frame of the PeopleSoft Interaction Hub.<br><br>**Note:** The item appears wrapped in your PeopleSoft Interaction Hub, unless the source website contains a frame buster. |

If a valid feed document is no longer available at a specified URL, the Feed Reader pagelet displays an error message for that feed similar to the following:

```
Unable to get a feed document of recognized formats from the url "URL"
```

## Working With the Language Selection Pagelet

**Image: Language Selection pagelet**

The following example illustrates the Language Selection pagelet. Access the Language Selection pagelet on the portal homepage as shown below.


The Language Selection pagelet displays links for each PeopleSoft-delivered translation that has been enabled for the application database. Click a link to change the displayed language without having to sign out and sign back in again. This functionality is especially useful for GUEST users who may not have access to the language selection options on the sign-in page.

# Working With the Signon Pagelet

Access the Signon pagelet on the PeopleSoft Interaction Hub Guest homepage.

**Image: Signon pagelet**

The following example illustrates the Signon pagelet. Access the Signon pagelet on the PeopleSoft Interaction Hub Guest homepage as shown below.


The Guest homepage displays the Signon pagelet. This pagelet enables users to switch from guest user accounts to their own user accounts.

**User ID** Enter a valid user ID.

**Password** Enter the corresponding password.

**Note:** These fields are case sensitive.

# Working With the User Logon Statistics Pagelet

This topic discusses how to personalize and use the User Logon Statistics pagelet.

## Pages Used to View Additional User Logon Statistics

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| Personalize User Logon Statistics Page | EO_PE_STATSPREF | Specify the numbers of months for which you want the pagelet to display user logon statistics. |
| User Logon Statistics by Date Page | EO_PE_DYSTAT_VW | Displays the total number of times that users signed in to the portal each day during a month, as well as the distinct number of sign-ins. |
| Distinct Users by Month Page | EO_PE_MTUSER_VW | Displays a list of all users who signed in to the portal during a month, as well as the number of times each user signed in during that month. |

| Page Name | Definition Name | Usage |
|---|---|---|
| User Logon Statistics by Hour Page | EO_PE_HRSTAT_VW | Displays the total number of times that users signed in to the portal each hour on the specified day, as well as the number of distinct user sign-ins. |
| Distinct Users by Date Page | EO_PE_DYUSER_VW | Displays a list of users who signed in to the portal on the specified day, as well as the number of times those users signed in during that day. |
| Distinct Users by Hour Page | EO_PE_HRUSER_VW | Displays a list of all users who signed in to the portal during a specified hour, as well as the number of times those users signed in during that hour. |

## Understanding the User Logon Statistics Pagelet

Logon statistics gather information regarding the number of users who log on to the portal during each month and the number of distinct user logons.

Portal administrators can view this data to obtain statistics about portal traffic and which users are contributing to the traffic. Data that is viewed can pertain to which users log on to the portal, along with logon statistics for the months of the year, days of the month, and hours of the day.

Portal administrators can add the User Logon Statistics pagelet to their homepages to gain convenitent access to logon statistics.

To view logon statistics, you must enable the Signon PeopleCode that is related to the User Logon Statistics pagelet.

See "Enabling the Signon PeopleCode" (PeopleSoft Interaction Hub 9.1: Portal and Site Administration).

## Personalize User Logon Statistics Page

Use the Personalize User Logon Statistics page (EO_PE_STATSPREF) to specify the numbers of months for which you want the pagelet to display user logon statistics.

**Navigation**

Click the Customize icon on the User Logon Statistics pagelet.

**Image: Personalize User Logon Statistics page**

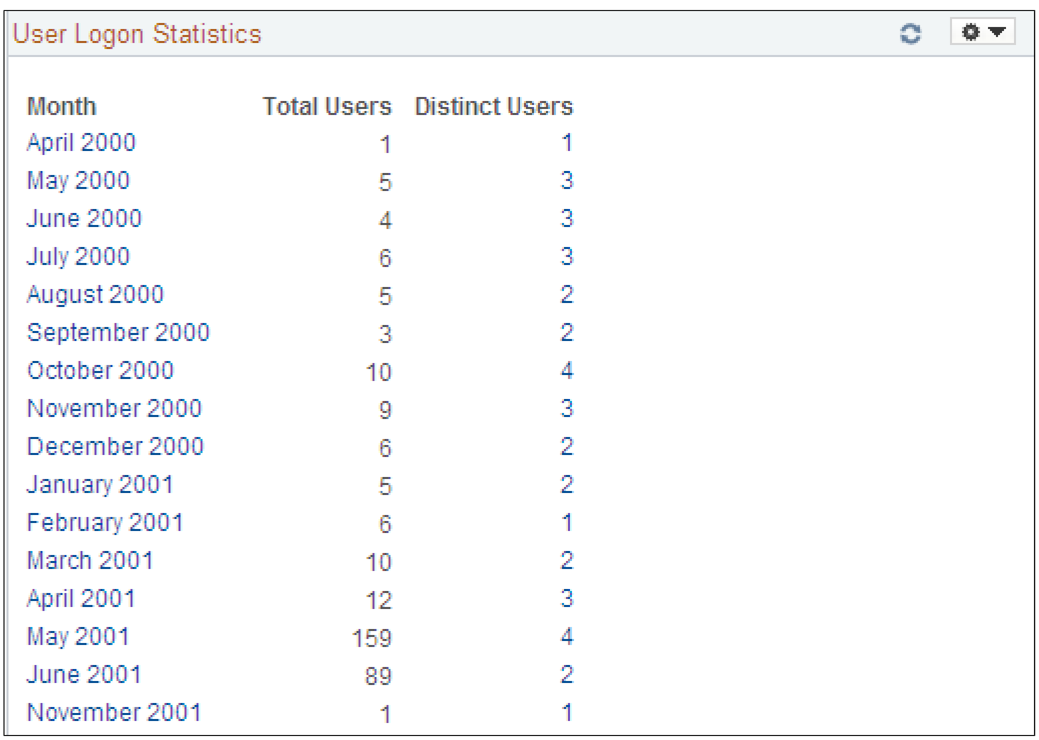
The following example illustrates the Personalize User Logon Statistics page.


**Number of Months to Display** Enter the number of months for which you want the pagelet to display user logon statistics.

## User Logon Statistics Pagelet

**Image: User Logon Statistics pagelet**

The following example illustrates the User Logon Statistics pagelet. Access the User Logon Statistics pagelet on the portal homepage as shown below.



The Logon Statistics pagelet displays the number of users who sign in to the portal during each month and the number of distinct user sign-ins.

| | |
|---|---|
| **Month** | Click the desired month to access the User Logon Statistics by Date page. |
| **Total Users** | Displays the total number of times that users signed in to the portal during the corresponding month. |
| **Distinct Users** | Displays the total number of users that signed in to the portal during the corresponding month.<br>Click the desired total to access the Distinct Users by Month page. |
| **Show All** | Click to display statistics for all available months. |

## User Logon Statistics by Date Page

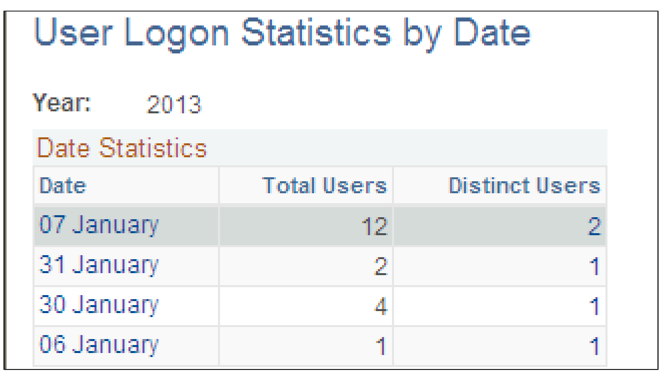
Use the User Logon Statistics by Date page (EO_PE_DYSTAT_VW) to displays the total number of times that users signed in to the portal each day during a month, as well as the distinct number of sign-ins.

**Navigation**

Click the link for the month on the User Logon Statistics pagelet.

**Image: User Logon Statistics by Date page**

The following example illustrates the User Logon Statistics by Date page.




| | |
|---|---|
| **Date** | Displays each day on which the portal was accessed in the selected month.<br>Click the link for the desired date to access the User Logon Statistics by Hour page. |
| **Total Users** | Displays the total number of times users signed in to the portal on the corresponding date. |
| **Distinct Users** | Displays the total number of users who signed in to the portal on the corresponding date. |

Click the link for the desired total users to access the Distinct Users by Date page.

## Distinct Users by Month Page

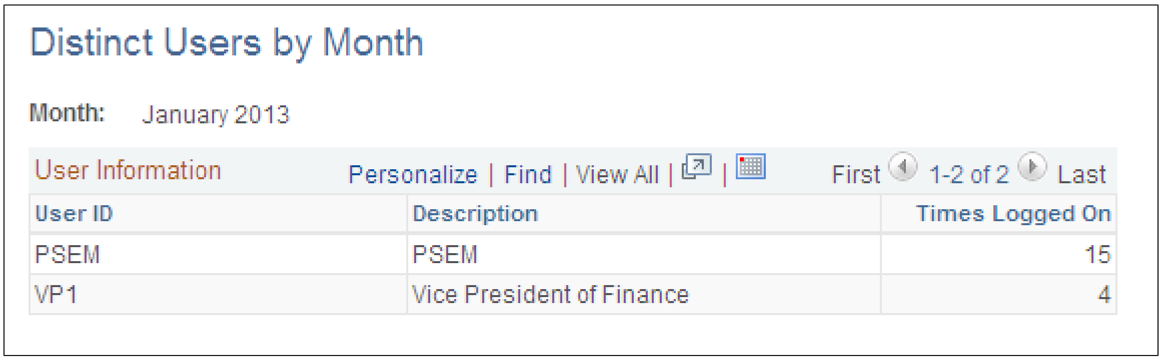
Use the Distinct Users by Month page (EO_PE_MTUSER_VW) to displays a list of all users who signed in to the portal during a month, as well as the number of times each user signed in during that month.

**Navigation**

Click the link for the total distinct users on the User Logon Statistics pagelet.

**Image: Distinct Users by Month page**

The following example illustrates the Distinct Users by Month page.




**Month**

Displays the month and year that you selected on the User Logon Statistics pagelet.

**User ID and Description**

Displays the user ID and a description of each user that signed in to the portal during the selected month.

**Times Logged On**

Displays the total number of times that the associated user signed in to the portal during the selected month.

## User Logon Statistics by Hour Page

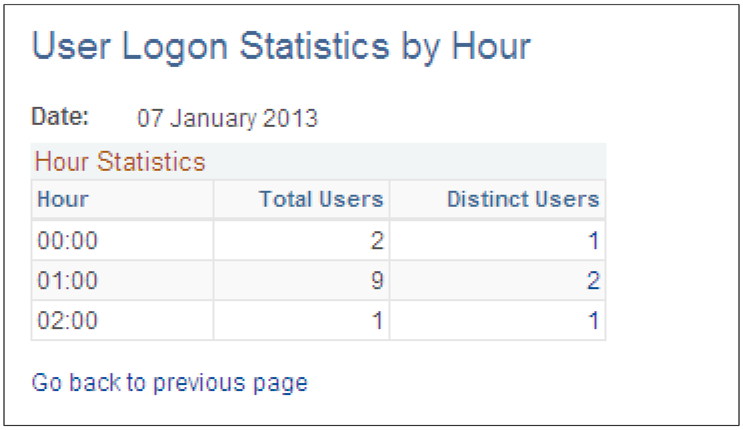
Use the User Logon Statistics by Hour page (EO_PE_HRSTAT_VW) to displays the total number of times that users signed in to the portal each hour on the specified day, as well as the number of distinct user sign-ins.

**Navigation**

- Click the link for the month on the User Logon Statistics pagelet.
- Click the link for the date on the User Logon Statistics by Date page.

**Image: User Logon Statistics by Hour page**

The following example illustrates the User Logon Statistics by Hour page.




| Hour | Total Users | Distinct Users |
|---|---|---|
| 00:00 | 2 | 1 |
| 01:00 | 9 | 2 |
| 02:00 | 1 | 1 |

**Date** Displays the date that you selected on the User Logon Statistics by Date page.

**Hour** Displays each hour on the selected date during which users signed in to the portal.

**Total Users** Displays the total number of times that users signed on to the portal during the corresponding hour .

**Distinct Users** Displays the total number of distinct users that signed in to the portal during the corresponding hour

Click the link for the total distinct users to access the Distinct Users by Hour page.

## Distinct Users by Date Page

Use the Distinct Users by Date page (EO_PE_DYUSER_VW) to displays a list of users who signed in to the portal on the specified day, as well as the number of times those users signed in during that day.

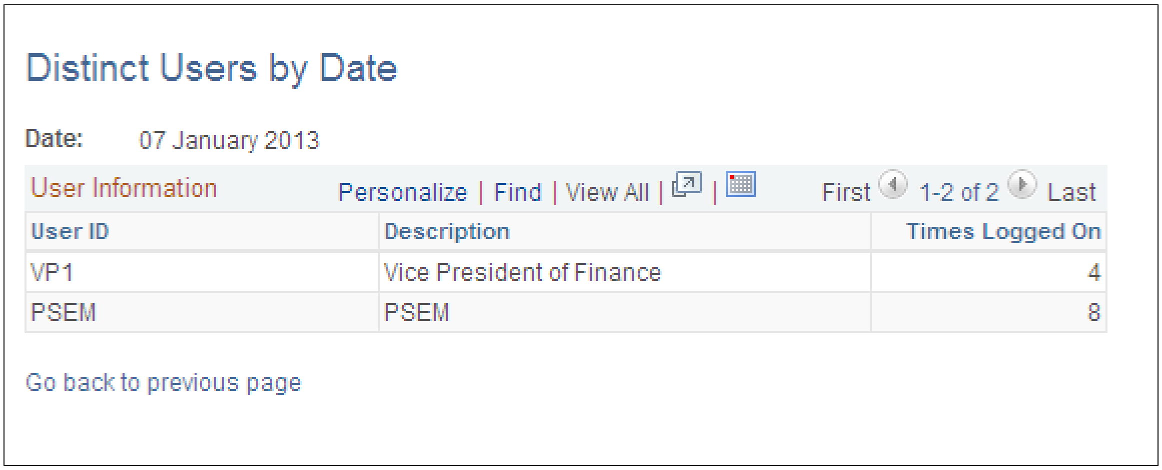
 

**Navigation**

- Click the link for the month on the User Logon Statistics pagelet.
- Click the link for the total distinct users on the User Logon Statistics by Date page.

**Image: Distinct Users by Date page**

The following example illustrates the Distinct Users by Date page.




| | |
|---|---|
| **Date** | Displays the date that you selected on the User Logon Statistics by Date page. |
| **User ID and Description** | Displays the user ID and a description of each user that signed in to the portal on the selected date. |
| **Times Logged On** | Displays the number of times that the corresponding user signed in to the portal on the selected date. |

## Distinct Users by Hour Page

Use the Distinct Users by Hour page (EO_PE_HRUSER_VW) to displays a list of all users who signed in to the portal during a specified hour, as well as the number of times those users signed in during that hour.

### Navigation

- Click the link for the month on the User Logon Statistics pagelet.
- Click the link for the date on the User Logon Statistics by Date page.
- Click the link for the total distinct users on the User Logon Statistics by Hour page.

**Image: Distinct Users by Hour page**

The following example illustrates the Distinct Users by Hour page.


| | |
|---|---|
| **Date and Hour and Hour** | Displays the date and hour that you selected on the User Logon Statistics by Date page or the User Logon Statistics by Hour pages. |
| **User ID and Description and Description** | Displays the user ID and a description of each user that signed in to the portal during the selected date and hour. |
| **Times Logged On** | Displays the number of times that the corresponding user signed in to the portal during the selected date and hour. |

Chapter 5

# Using My Links

## Understanding My Links

Using My Links functionality in Oracle's PeopleSoft Interaction Hub provides you an easy way for you to bookmark your most frequently needed and accessed content. My Links serves as a collection of bookmarks to specific PeopleSoft Interaction Hub pages, to PeopleSoft transactions, and to non-PeopleSoft content such as external websites.

The My Links drop-down menu is available by default on the portal header only on the collaborative workspace homepage. From the portal homepage and from transaction pages, the My Links functionality is available through the Add to My Links link or the Favorites drop-down menu.

The My Links feature can be enabled by your portal administrator to appear in one or both of the following locations:

- In the portal header.
- As part of the PeopleTools Favorites feature.

See Enabling My Links.

Most aspects of the My Links feature are available from either location such as adding, editing, or navigating to any links defined as My Links. However, the View My Links page is directly accessible only through the My Links link in the portal header. Depending on how a user has configured his or her collection of My Links links, the View My Links page might or might not be available through the Favorites drop-down menu.

**Image: My Links drop-down menu in the portal header**

The following example illustrates the My Links drop-down menu in the portal header page. It shows the My Links drop-down list box with My Links functions (refresh, add, edit), a link at the root of the My Links collection, and other links organized by folders:

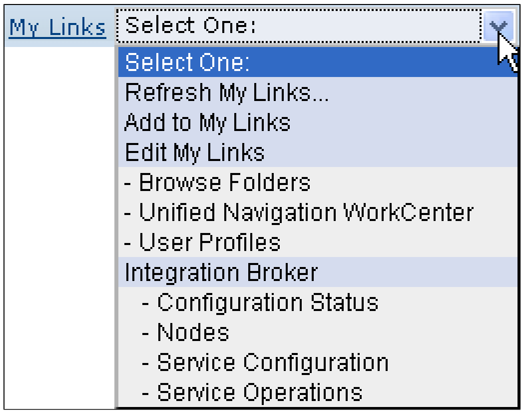
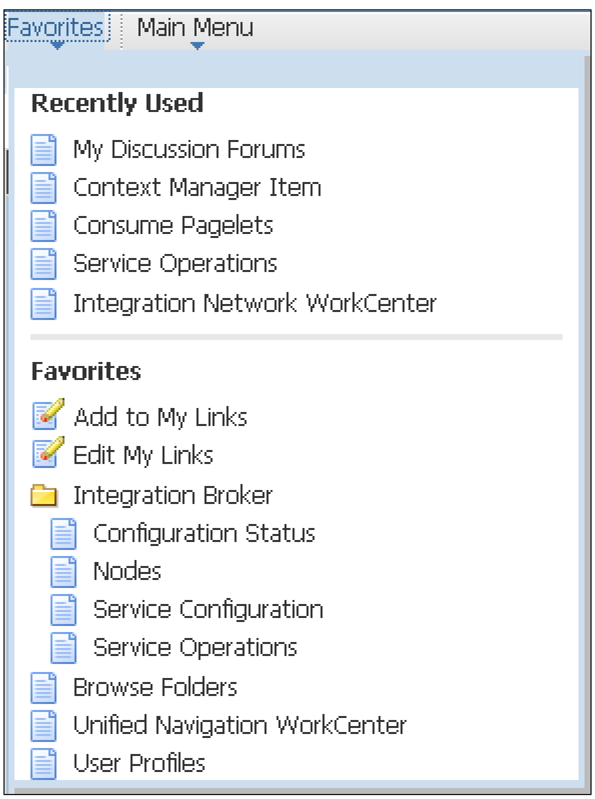



**Image: My Links in PeopleTools Favorites**

The following example illustrates the My Links in PeopleTools Favorites. It shows My Links integrated as part of the PeopleTools Favorites feature:




My Links are defined and accessible according to the user ID with which you log in to PeopleSoft Interaction Hub. Therefore, unlike browser bookmarks, you can access your My Links collection from any workstation that can connect to your PeopleSoft Interaction Hub site.

The content types supported by My Links include:

- External URLs.
- Navigation collections.
- Components with user-defined query string parameters.
- Pages directly accessible from the main drop-down menu.
- PeopleSoft queries.

# Enabling My Links

My Links functionality can be configured to be part of the portal header, to be integrated with the PeopleTools Favorites feature, to be in both locations, or to be in neither location.

See "Enabling or Disabling My Links" (PeopleSoft Interaction Hub 9.1: Portal and Site Administration).

# Maintaining My Links

This topic discusses maintaining My Links. It discusses steps to add and edit a link, folders, menu folders and navigation collections in My Links.

## Pages Used to Maintain My Links

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| Add to My Links Page | EPPSC_ADD_MYSHRTCT | Add a link to the current page to your My Links collection. |
| Edit My Links Page | EPPSC_EDIT_MYSC | Maintain your My Links collection. Access pages that enable you to add, edit, and delete links and folders. |
| Add Link Page | EPPSC_AE_MYSHRTCT | Add a link to your My Links collection. |
| Select Menu Item Page | EPPSC_BROWSEREG_MS | Browse through a hierarchical display of the Applications Menu and select the menu folder or menu item for which you want to create a My Links. |
| Edit Link Page | EPPSC_AE_MYSHRTCT | Edit a link in your My Links collection. |
| My Links - Delete Confirmation | EO_PE_DEL_CONFIRM | Confirm or cancel the deletion. |
| Add Folder Page | EPPSC_AE_MYFOLDER | Add a folder to organize your links in your My Links collection.<br><br>Edit a folder in your My Links collection. |

| Page Name | Definition Name | Usage |
|---|---|---|
| Add Other Page | EPPSC_AE_MYFLD_OTH | Add an item that references either a menu folder or a navigation collection to your My Links collection. |
| Browse Navigation Collections Page | EPPSC_SRCH_MS | Search for and select the navigation collection for which you want to create a link in your My Links collection. |

## Add to My Links Page

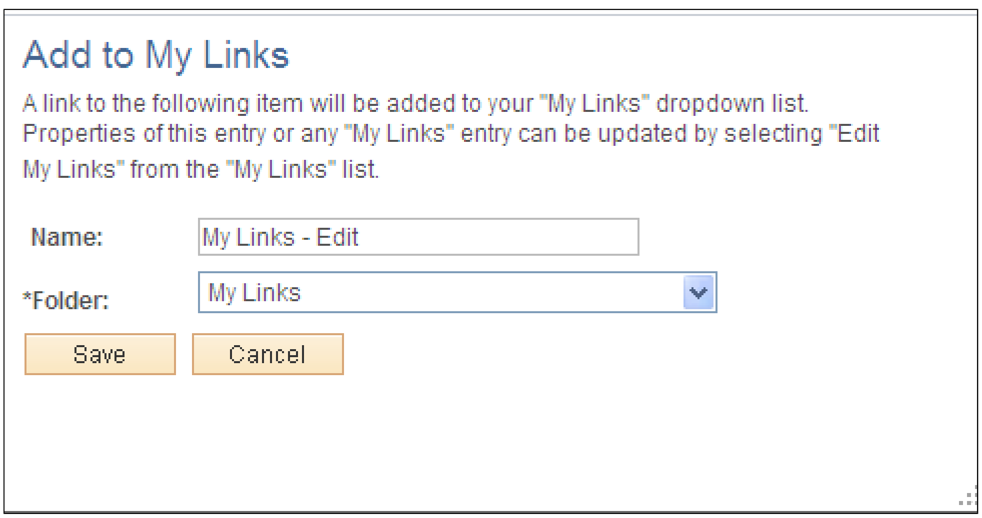
Use the Add to My Links page (EPPSC_ADD_MYSHRTCT) to add a link to the current page to your My Links collection.

**Navigation**

- Click the Add to My Links link in the portal header.
- Click the Add to My Links item in the My Links drop-down list box the portal header.
- Click the Add to My Links item in the Favorites drop-down menu.

**Image: Add to My Links modal window**

The following example illustrates the Add to My Links page.




**Name** The menu item link text defined for the currently accessed menu item automatically defaults as the link name. You can override this default text as shown in the example.

**Save** Click to save the current page to My Links.

## Edit My Links Page

Use the Edit My Links page (EPPSC_EDIT_MYSC) to maintain your My Links collection.

Access pages that enable you to add, edit, and delete links and folders.

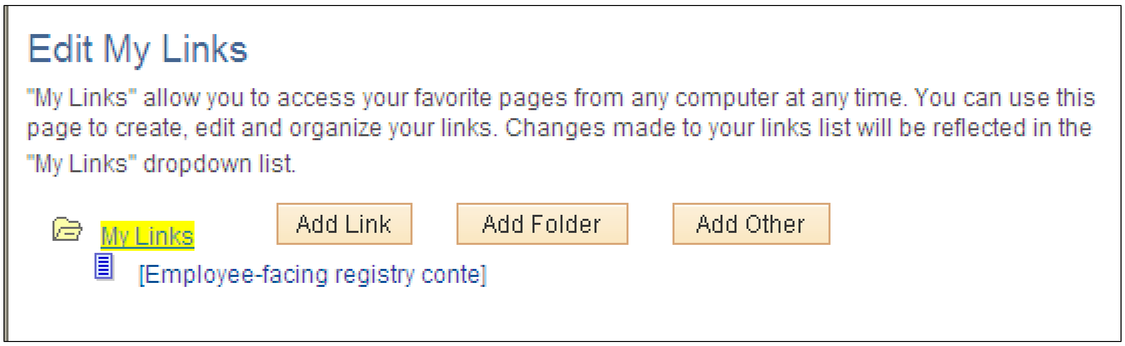
 

**Navigation**

- Click the Edit My Links item in the My Links drop-down list box in the portal header.
- Click the Edit My Links item in theFavorites drop-down menu.
- Click the Edit My Links button on the View My Links page.

**Image: Edit My Links page**

The following example illustrates the Edit My Links page.




Use the Edit My Links page to maintain your My Links collection.

| | |
|---|---|
| **My Links** | This is the root folder that holds your My Links collection. |
| **Add Link** | Click to access the Add to My Links page. This option is available when you select the My Links top-level folder or a folder added using the Add Folder page. |
| **Add Folder** | Click to access the Add Folder page. This option is available when you select the My Links top-level folder. |
| **Add Other** | Click to access the Add Other page. This option is available when you select the My Links top-level folder. |
| **Edit Link** | Click to access the Edit Link page.<br><br>This option is available when you select a link in the My Links hierarchy. |
| **Delete Link** | Click to access the My Links - Delete Confirmation page, where you are prompted to confirm or cancel your deletion.<br><br>This option is available when you select a link in the My Links hierarchy. |
| **Edit Folder** | Click to access the Edit Folder page. This option is available when you select a folder in the My Links hierarchy. |
| **Delete Folder** | Click to access the My Links - Delete Confirmation page, where you are prompted to confirm or cancel your deletion. This option is available when you select a folder in the My Links hierarchy. |

## Add Link Page

Use the Add Link page (EPPSC_AE_MYSHRTCT) to add a link to your My Links collection.

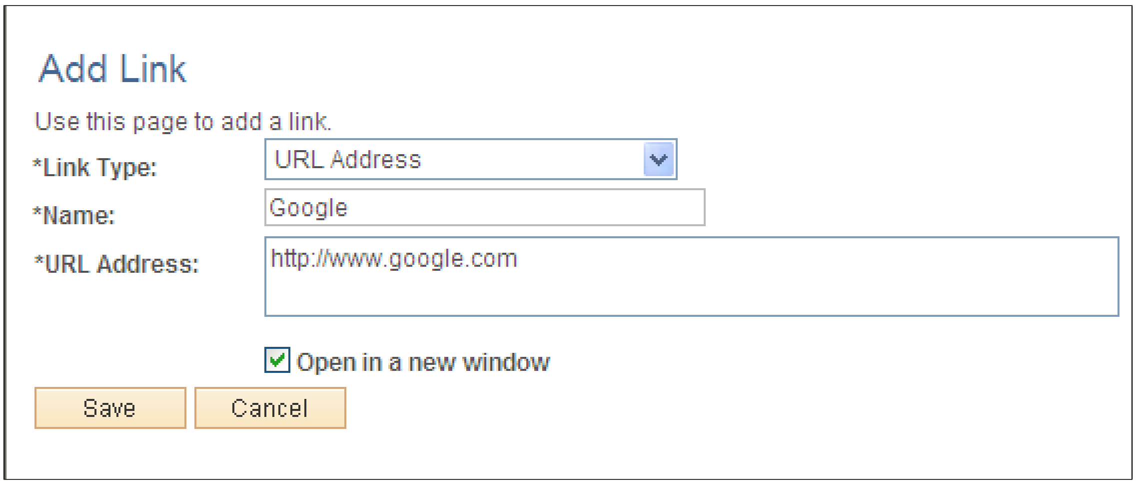
**Navigation**

Click the Add Link button on the Edit My Links page.

A

**Image: Add Link page**

The following example illustrates the Add Link page.




Use the Add Link page to add a link to your My Links collection.

**Link Type**

Select from the following:

- *Menu Item.* Select to add a link to a menu item. This establishes a link to the menu item's content reference in the portal registry. If selected, the Menu Item link displays.
- *Query.* Select to establish a link to a PeopleSoft query. If selected, the Query Name field displays.
- *URL Address.* Select to establish a link to a URL. This option can be used to establish a link to an external website. If selected, the URL Address field displays.

**Name**

Enter a name for the item.

When the Link Type field value is set to *Menu Item,* the link text defined for the menu item you select automatically defaults as the link name. You can override this default text.

**Open in a new window**

Select to indicate that, when accessed, you want the item to display in a new window.

If this option is not selected, when accessed, the item is displayed within your PeopleSoft Interaction Hub target frame.

| | |
|---|---|
| **Menu Item** | Displays when the Link Type field value is set to *Menu Item.*<br><br>Select to access the Select Menu Item page, where you can browse through the enterprise menu for the menu item for which you want to create a link.<br><br>Once you have selected a menu item, displays the menu-based navigation path to the item. |
| **Query Name** | Displays when the Link Type field value is set to *Query.* Select from available public queries. You may manually enter a non-public query. |
| **URL Address** | Displays when the Link Type field value is set to *URL Address.* |

### Advanced Properties

The Advanced Properties group box displays when the Link Type field value is set to *Menu Item* or *Query.*

| | |
|---|---|
| **Additional Parameters** | Enter additional query string parameters to PeopleSoft components. For example, you can use these additional parameters to point a link to a specific query or row of data on an application business transaction page.<br><br>When the Link Type field value is set to *Query,* you can use this field to enter additional query parameters.<br><br>When the Link Type field value is set to *Menu Item,* you can use this field to enter additional parameters. |

## Select Menu Item Page

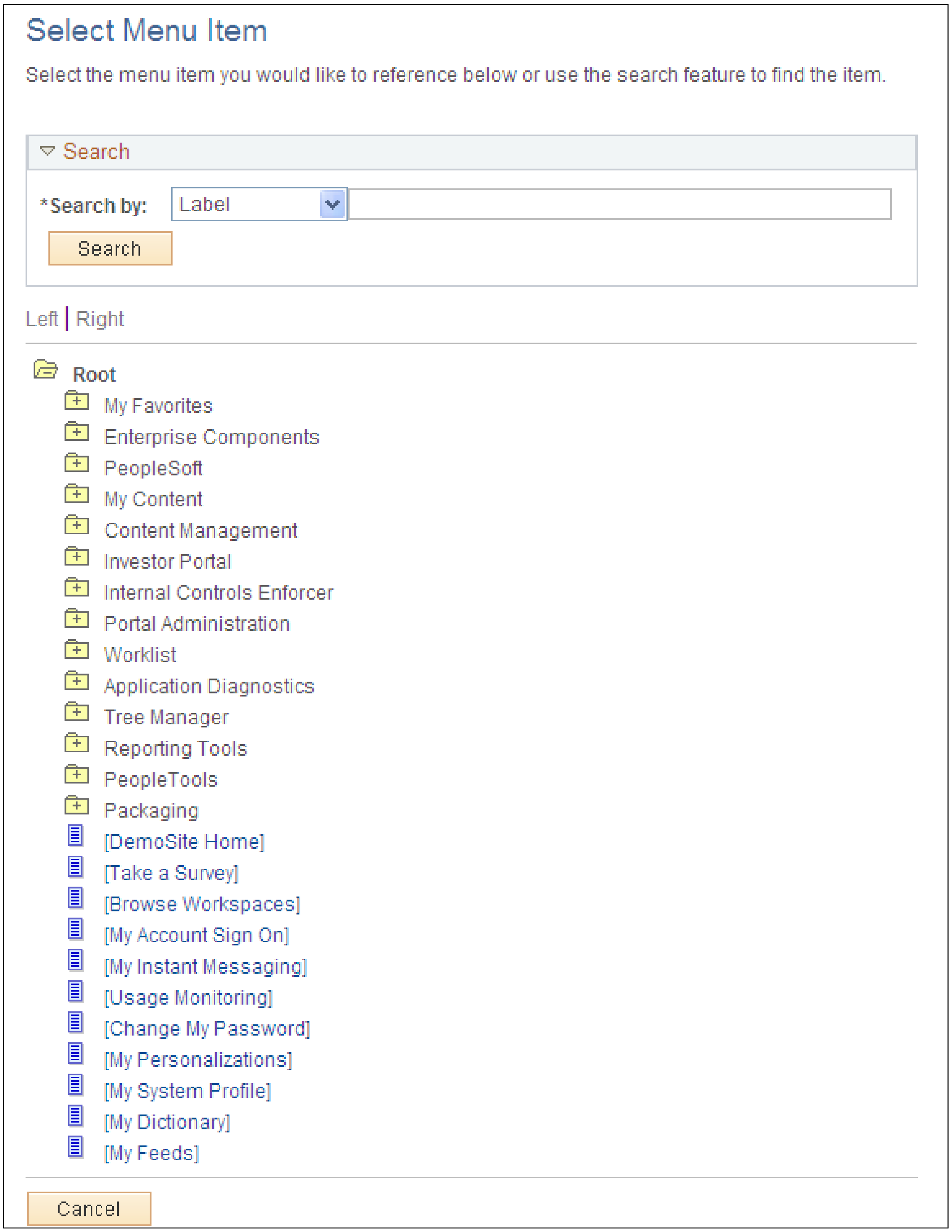
Use the Select Menu Item page (EPPSC_BROWSEREG_MS) to browse through a hierarchical display of the Applications Menu and select the menu folder or menu item for which you want to create a My Links.

### Navigation

- Select the Menu Item lookup button on the Add Link page.
- Select the Menu Item lookup button on the Edit Link page.
- Select the Menu Folder lookup button on the Add Other page.
- Select the Menu Folder lookup button on the Edit Folder page.

### Image: Select Menu Item page

The following example illustrates the Select Menu Item page.



Use the Select Menu Item page to select a menu item or a menu folder to be a link in your My Links collection.

### Search

**Search by**

*Description.* Select to conduct your search based on menu item or folder description text.

*Label.* Select to conduct your search based on menu item or folder label text.

The search is not case sensitive.

### Search Results

**Label**

Select the linked label text to locate and select the item or folder in the enterprise menu hierarchy displayed at the bottom of the page.

## Edit Link Page

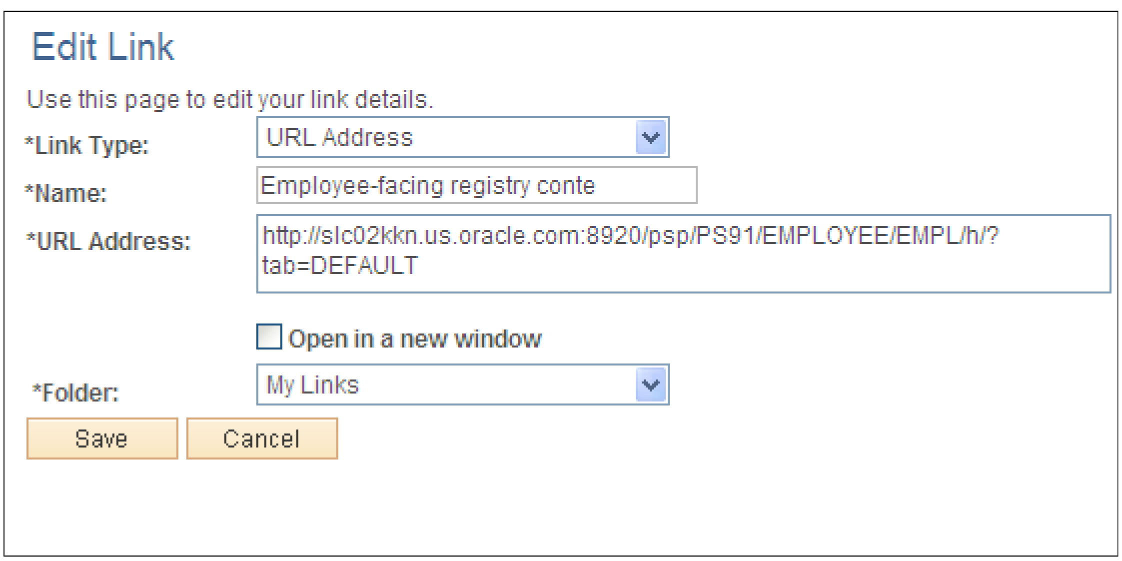
Use the Edit Link page (EPPSC_AE_MYSHRTCT) to edit a link in your My Links collection.

**Navigation**

Click the Edit Link button on the Edit My Links page.

**Image: Edit Link page**

The following example illustrates the Edit Link page.




Use the Edit Link page to edit a link in your My Links collection.

**Link Type**

Select from the following:

- *Menu Item.* Select to add a link to a menu item. This establishes a link to the menu item's content reference in the portal registry. If selected, the Menu Item link displays.
- *Query.* Select to establish a link to a PeopleSoft query. If selected, the Query Name fields display.
- *URL Address.* Select to establish a link to a URL. This option can be used to establish a link to an external website. If selected, the URL Address field displays.

**Name** Enter a name for the item.

When the Link Type field value is set to *Menu Item,* the link text defined for the menu item you select automatically defaults as the link name. You can override this default text.

**Open in a new window** Select to indicate that, when accessed, you want the item to display in a new window.

If this option is not selected, when accessed, the item is displayed within your PeopleSoft Interaction Hub target frame.

**Menu Item** Displays when the Link Type field value is set to *Menu Item.*

Select to access the Select Menu Item page, where you can browse through the enterprise menu for the menu item for which you want to create a link.

Once you have selected a menu item, displays the menu-based navigation path to the item.

**Query Name** Displays when the Link Type field value is set to *Query.* Select from available public queries. You may manually enter a non-public query.

**URL Address** Displays when the Link Type field value is set to *URL Address.*

**Folder** Displays the folder in which the item is stored. You can move the link to another My Links folder by selecting an available folder from the drop-down list box.

## Advanced Properties

The Advanced Properties group box displays when the Link Type field value is set to *Menu Item* or *Query.*

**Additional Parameters** Enter additional query string parameters to PeopleSoft components. For example, you can use these additional parameters to point a link to a specific query or row of data on an application business transaction page.

When the Link Type field value is set to *Query,* you can use this field to enter additional query parameters.

When the Link Type field value is set to *Menu Item,* you can use this field to enter additional parameters.

## Add Folder Page

Use the Add Folder page (EPPSC_AE_MYFOLDER) to add a folder to organize your links in your My Links collection.

**Navigation**

Click the Add Folder button on the Edit My Links page.

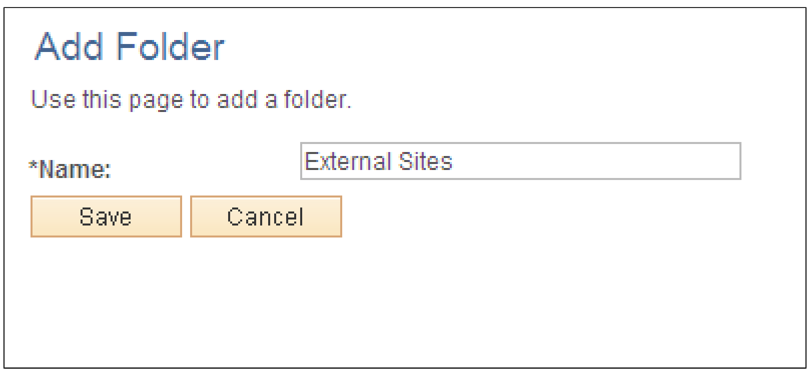
Use the Edit Folder page (EPPSC_AE_MYFOLDER) to edit a folder in your My Links collection.

**Navigation**

Click the Edit Folder button on the Edit My Links page.

**Image: Add Folder page**

The following example illustrates the Add Folder page.




Use the Add Folder page and the Edit Folder page to maintain the name of the folder.

| | |
|---|---|
| **Name** | Enter the name for the folder. |

## Add Other Page

Use the Add Other page (EPPSC_AE_MYFLD_OTH) to add an item that references either a menu folder or a navigation collection to your My Links collection.

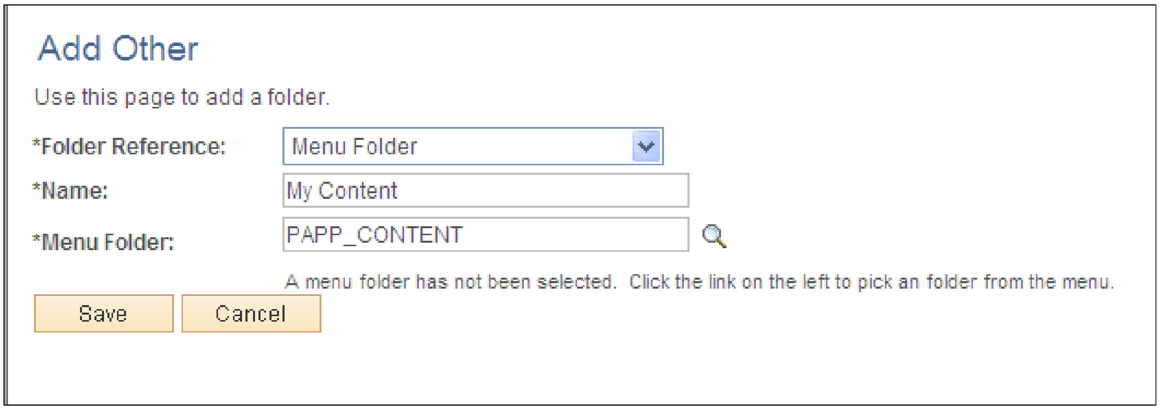
 

**Navigation**

Click the Add Other button on the Edit My Links page.

**Image: Add Other page**

The following example illustrates the Add Other page.




Use the Add Other page to add a menu folder or navigation collection as a link in your My Links collection. In the My Link drop-down list box, the contents of the menu folder or navigation collection are expanded to allow you to navigate to any link in the folder or collection.

**Note:** On the Edit My Links page and the View My Links page, these items remain collapsed and you cannot view, navigate to, or edit the individual links within the folder or navigation collection.

| | |
|---|---|
| **Name** | When the Folder Reference value is set to *Menu Folder,* the menu folder label text automatically defaults as the folder name. You can override this default text.<br><br>When the Folder Reference value is set to *Navigation Collection,* the navigation collection name automatically defaults as the folder name. You can override this default text. |
| **Folder Reference** | *Menu Folder.* Select to establish a link that accesses a folder in the enterprise menu. If selected, the Menu Folder link displays.<br><br>*Navigation Collection.* Select to establish a link that accesses a folder that contains a navigation collection. To be eligible for My Links functionality, the navigation collection must have been published with the Option for My Links option selected on the Publish Collection page. If selected, the Navigation Collection link displays. |
| **Menu Folder** | Displays when the Folder Reference value is set to *Menu Folder.*<br><br>Select to access the Select Menu Item page, where you can browse through the enterprise menu for the menu folder for which you want to create a link.<br><br>Once you have selected a menu folder, displays the menu-based navigation path to the folder. |

**Navigation Collection**

Displays when the Folder Reference value is set to *Navigation Collection.*

Select to access the Browse Navigation Collections page, where you can browse through navigation collections for which you want to create a link.

To be accessible on this page, the navigation collection must have been published with the Option for My Links option selected on the Publish Collection page.

See the product documentation for *PeopleTools: Portal Technology*

## Browse Navigation Collections Page

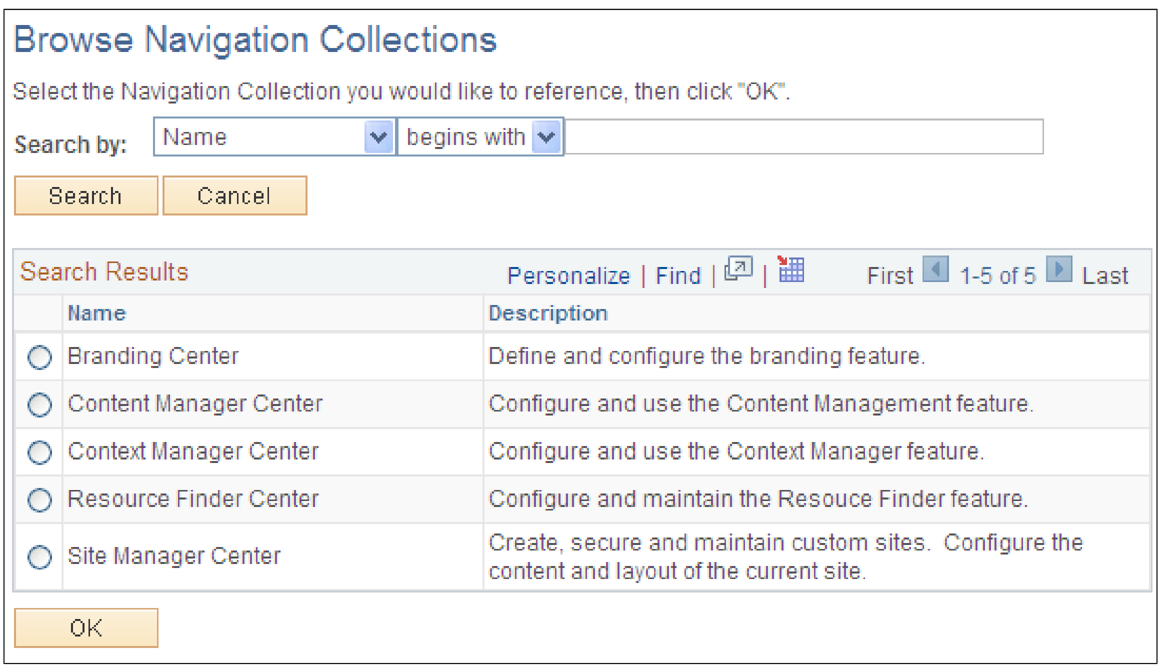
Use the Browse Navigation Collections page (EPPSC_SRCH_MS) to search for and select the navigation collection for which you want to create a link in your My Links collection.

**Navigation**

- Click the Navigation Collection lookup button on the Add Other page.
- Click the Navigation Collection lookup button on the Edit Folder page.

**Image: Browse Navigation Collections page**

The following example illustrates the Browse Navigation Collections page.




Use the Browse Navigation Collections page to select a navigation collection to be a link in your My Links collection.

**Search by**

*Description.* Select to conduct your search based on navigation collection descriptions.

*Name.* Select to conduct your search based on navigation collection names.

This search is not case sensitive.

### Search Results

Navigation collections available for selection in the Search Results scroll area meet your search criteria and have been published with the Option for My Links option selected on the Publish Collection page.

See the product documentation for *PeopleTools: Portal Technology*, “Working With Navigation Pages,” Publishing Navigation Collections.

# Accessing My Links

This topic discusses accessing links and the View My Link page.

## Page Used to Access My Links

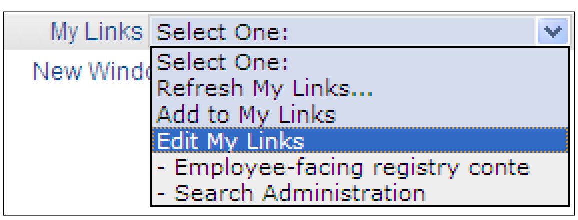
| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| View My Links Page | EPPSC_VIEW_MYSC | Access your My Links collection to navigate to a specific link. |

## My Links Page

When configured as part of the portal header, My Links are accessible from the My Links drop-down menu.

**Image: My Links drop-down menu in the portal header**

The following example illustrates the My Links drop-down menu in the portal header.




Use the My Links drop-down list box to navigate to links you have defined or to perform selected My Links functions.

**My Links** Click to access the View My Links page.

**Refresh My Links...** Select to force a refresh of the My Links data displayed in the drop-down list box.

**Add to My Links** Select to access the Add to My Links page.

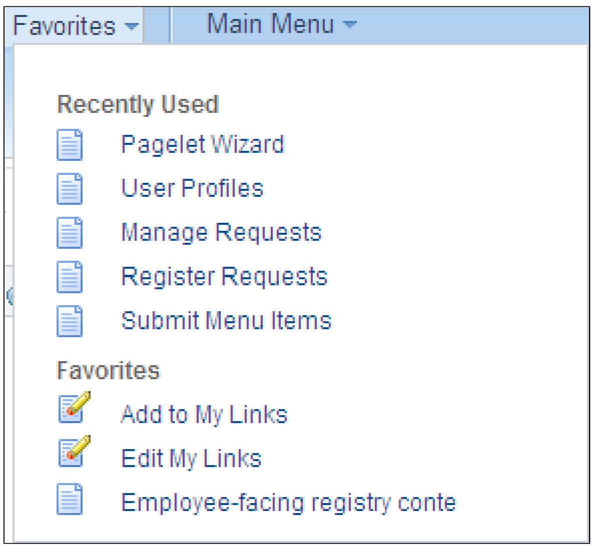
 

| | |
|---|---|
| **Edit My Links** | Select to access the Edit My Links page. |
| **<link name>** | Click to navigate to the link content. |
| **<folder name> or <menu folder name> or <navigation collection name>** | Click to access the View My Links page. |

**Image: My Links in PeopleTools Favorites**

When configured to be integrated with the PeopleTools Favorites feature, My Links appear under the Favorites drop-down menu:

The following example illustrates the My Links in PeopleTools Favorites.




Use the Favorites drop-down menu to navigate to links you have defined or to perform selected My Links functions.

| | |
|---|---|
| **Add to My Links** | Select to access the Add to My Links page. |
| **Edit My Links** | Select to access the Edit My Links page. |
| **<link name>** | Click to navigate to the link content. |
| **<folder name> or <menu folder name> or <navigation collection name>** | Click to access the View My Links page. |

## View My Links Page

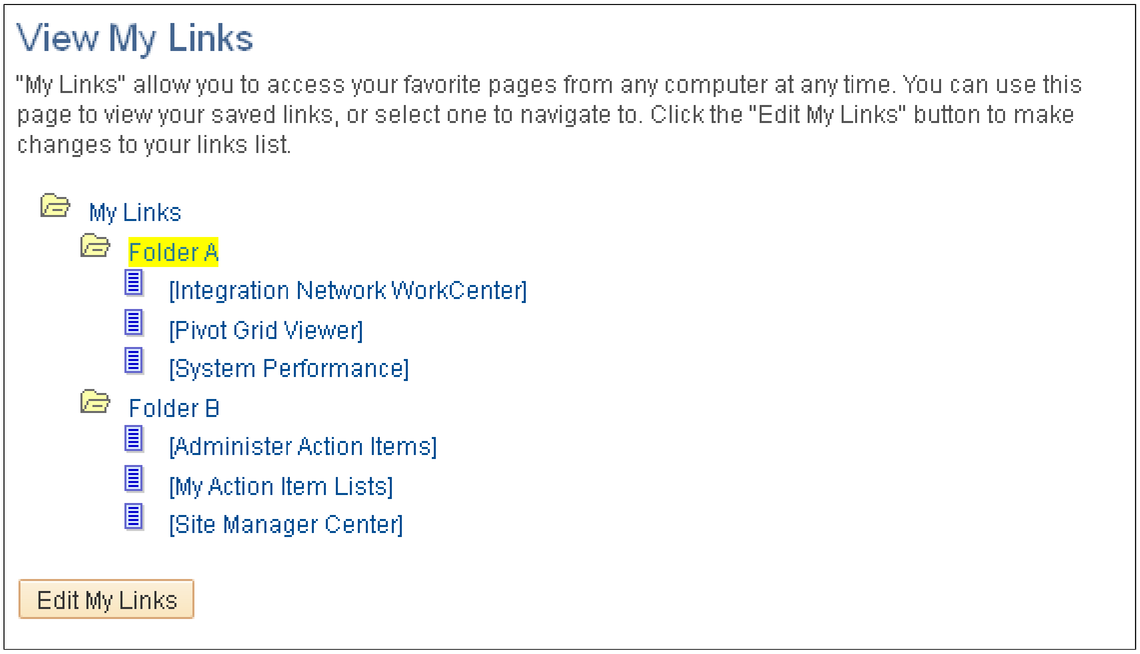
Use the View My Links page (EPPSC_VIEW_MYSC) to access your My Links collection to navigate to a specific link.

**Navigation**

- Click the My Links link in the portal header.
- In the My Links drop-down list box, select a folder, a menu folder, or a navigation collection folder.
- In the Favorites drop-down menu, select a folder, a menu folder, or a navigation collection folder.

**Image: View My Links page**

The following example illustrates the View My Links page.




Use the View My Links page to access your My Links collection to navigate to a specific link.

**<link name>** Click to navigate to the link content.

**Edit My Links** Click to access the Edit My Links page.

## Chapter 6

# Working With Action Items

## Action Items Overview

In Oracle's PeopleSoft Interaction Hub, the action item feature allows you to collaborate with other users to create and track action items. *Action items* are assignments or tasks that are assigned to people across groups and require some sort of activity, monitoring, or event to take place before they can be considered complete. Items can be tracked through summary homepage pagelets, through inquiry pages, as well as through email notification and calendar entries.

These items are organized into groups called *action item lists.* An action item list is a set of action items. Action items appear in the list as a flat view with no nested hierarchy. Security privileges for users and for roles are defined based on the list membership.

Action item lists can be accessed from portals, sites, and workspaces. Action item lists exist in a *standalone* form in portals and sites. Standalone action item lists are accessible in portals and sites through the My Action Item Lists page under the My Content menu. In workspaces, action item lists are available in the Action Item Lists module that is part of the workspace.

### Understanding the Tasks Pagelet

The Tasks pagelet is a delivered pagelet that displays a consolidated list of all of your action items and tasks based on the preferences that you specify for the pagelet. The Tasks pagelet and related pages provide you with access to personal tasks, worklist items, and action items that are assigned to you. Personal tasks are those you add to your task list using the Task Details page. Worklist items are those tasks that have been routed to you by way of PeopleSoft Workflow. Action items are those assignments or actionable items that are related to an action item list.

See Working With the Tasks and Tasks Pagelet.

### Understanding the Action Item Lists Module in Collaborative Workspaces

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 "Using the Action Item Lists Module" (PeopleSoft Interaction Hub 9.1: Collaborative Workspaces).

## Managing Action Item Lists

This topic discusses managing action item lists and assigning action item list participants and privileges.

## Pages Used to Manage Action Item Lists

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| My Action Item Lists Page | EPPAI_BROWSE | View and manage action item lists. |
| List Properties Page | EPPAI_LIST_INFO | View or define the Action Item List and notification properties. |
| List Security Page | EPPAI_LIST_PRIV | Assign privilege sets to members of the list. |

## My Action Item Lists Page

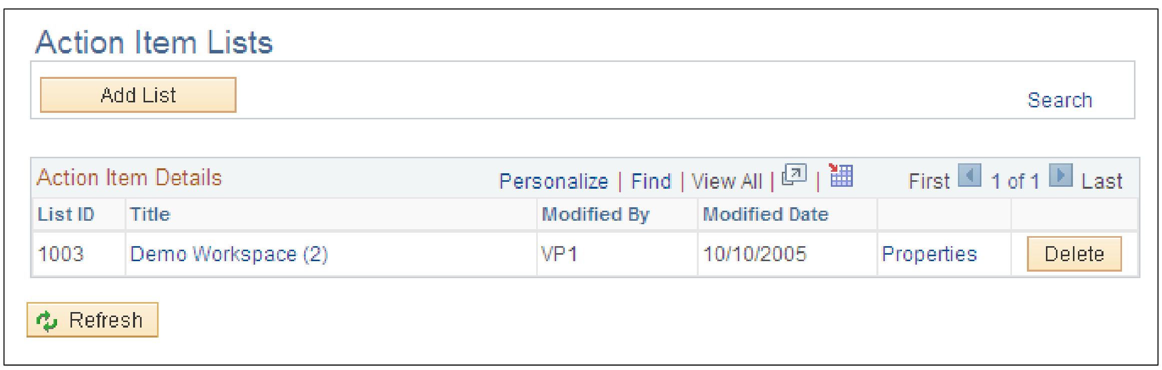
Use the My Action Item Lists page (EPPAI_BROWSE) to view and manage action item lists.

**Navigation**

My Content, My Action Item Lists

**Image: My Action Item Lists page**

The following example illustrates the My Action Item Lists page. Access the My Action Item Lists page (My Content, My Action Item Lists) as shown in the below image.




Use the My Action Item Lists page to access the action item lists of which you are a member.

If you have permission to create an action item list, the Add List button appears on the page. If you are the administrator of a list, the Properties link is available and you can edit the list properties and security. The Delete button is available only to administrators as well.

**Add List**

Click to create a new action item list.

**Note:** This button appears only for those users who have create list privileges.

**Display Active Lists or Display Inactive Lists**

If you have created lists that have been set to a status of *inactive,* the system displays a drop-down list box on the page the enables you to display either active lists or all inactive lists that you have created.

| | |
|---|---|
| **Search** | Click to access the Search Action Items page where you can retrieve action items based on the search criteria that you enter. |
| **Title** | Click the list title to view the individual action items that are associated with the list. |
| **Properties** | Click to view the List Properties page on which you can define properties for the list.<br>**Note:** This button appears only for those users who have edit list privileges. |
| **Delete** | Click to delete the list.<br>**Note:** This button appears only for those users who have delete list privileges. |

## List Properties Page

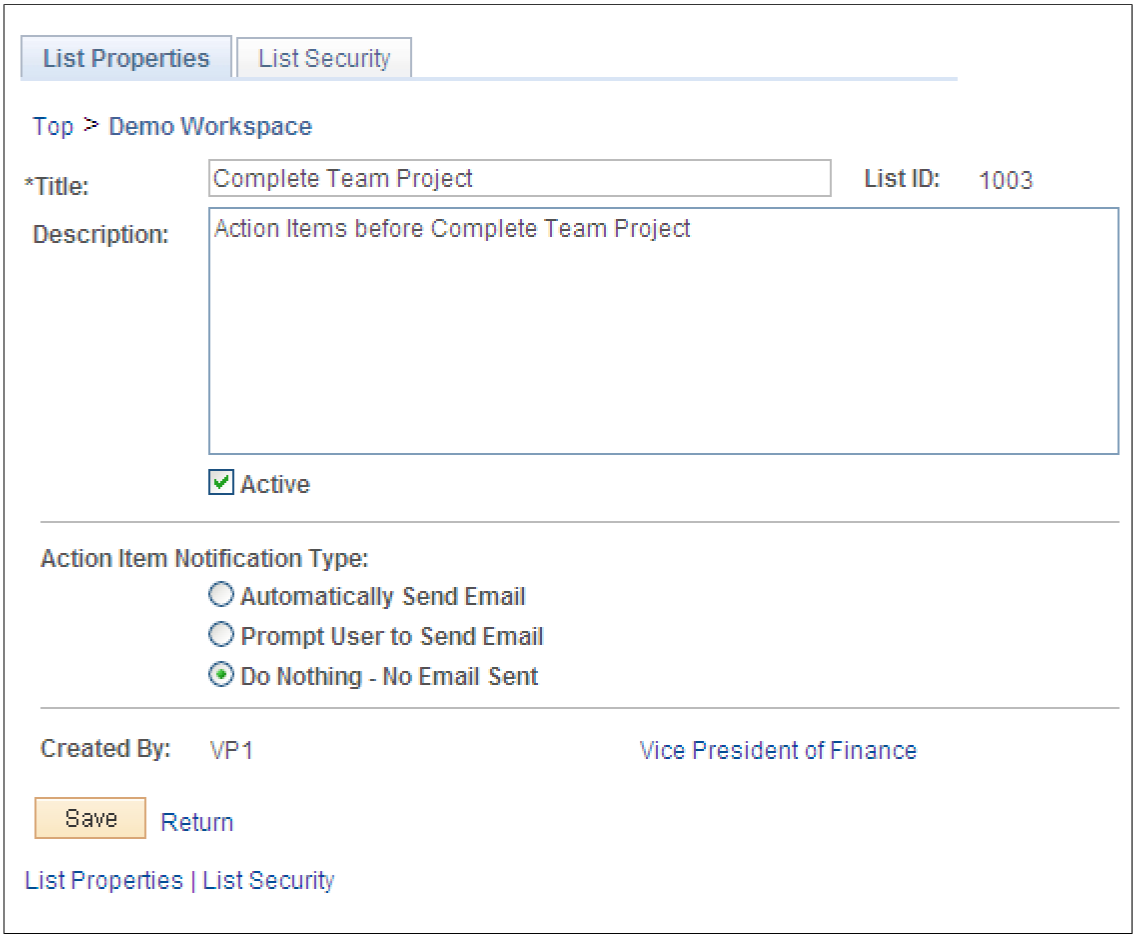
Use the List Properties page (EPPAI_LIST_INFO) to view or define the Action Item List and notification properties.

### Navigation

- Click the Properties link on the My Action Item Lists page.
- Click the Add List  button on the My Action Item Lists page.

### Image: List Properties page

The following example illustrates the List Properties page.




Use the List Properties page to define properties for the action item list.

| | |
|---|---|
| **Title** | The name of the list. |
| **List ID** | After the list is saved, the system generates and displays a unique number to identify the list. |
| **Description** | A description for the list. |
| **Created By** | The system displays the user ID and a link to the profile of the list creator.<br><br>Click the link to display the member's profile page. If Resource Finder is enabled, the system displays the Resource Finder profile. |

| | |
|---|---|
| **Active** | Select this option to make the list active and have the list appear in the portal or site. If this option is cleared, the list is not be available to users. |
| **Action Item Notification Type** | Specify how email notifications should be sent to members of the list any time an action item associated with the list is changed or created and saved. The text of the email describes any changes made to the action item and contains a link to the Action Item Details page.<br><br>The available options are:<br><br>• *Automatically Send Email* sends an email notification to all members each time an action item in the list is added or changed.<br><br>• *Prompt User to Send Email* gives the user who adds or changes an action item the option of sending an email to a selected list of list members.<br><br>• *Do Nothing - No Email Sent* no email messages are sent and users are not prompted to send an email. |
| **Return** | Displays the My Action Item Lists page. |
| **Publish as Pagelet** | Displays the List Properties - Publish Pagelet Wizard Definition page on whichyou can publish the pagelet to the homepage. |

## List Security Page

Use the List Security page (EPPAI_LIST_PRIV) to assign privilege sets to members of the list.

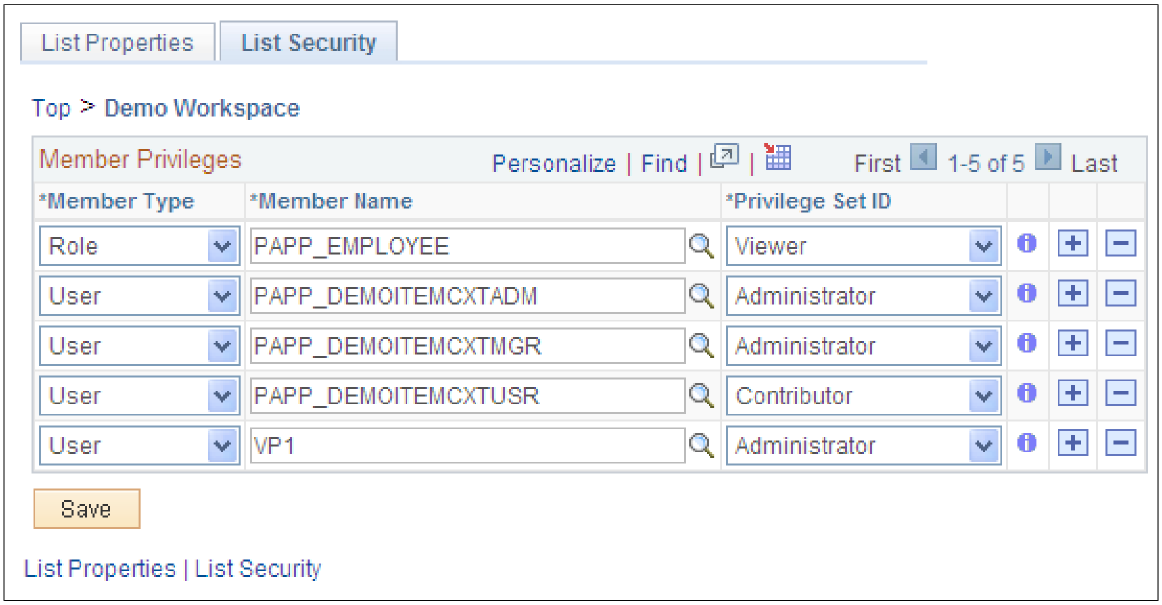
 

### Navigation

- Select List Security on the List Properties page.
- Click a Privileges link on the Administer Action Item Lists page.

### Image: List Security page

The following example illustrates the List Security page.




Use the List Security page to assign privilege sets for list members. Members and privilege sets are assigned at the action item list level. Privilege sets maintain security for accessing and managing action item lists as well as viewing, editing, and deleting action items.

---

**Note:** If a user who does not have security access to the list is assigned an action item from that list, she or he is able to view the Action Item Details page, but she or he does not have access to the list.

---

**Member Type**

Select the type of participant you want to add to the action item list. Available values include:

- *Role* — Select to be able to select a role in the Member Name field. Available group names are derived from PeopleSoft roles defined in the Roles component.

  See the product documentation for *PeopleTools: Security Administration*, "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 in the User Profiles component.

  See the product documentation for *PeopleTools: Security Administration*, "Administering User Profiles."

**Member Name**

Specify the user ID or role name for the list member.

| | |
|---|---|
| **Privilege Set ID** | Select a privilege level you want to assign to the member. Delivered values are:<br>• *Administrator* — Administrators can add, edit, or delete any action items in the list. In addition, they can add and delete list members.<br>• *Contributor* — Contributors can add or edit action items. They can delete their own action items, but not those belonging to others.<br>• *Viewer* — Viewers have read-only access to the action items. |
|  | Click to view additional information about the actions that the privilege set enables the member to use. |

# Creating and Managing Action Items

This topic discusses creating and managing action items, searching within action items, viewing action item list and change log.

## Pages Used to Create and Manage Action Items

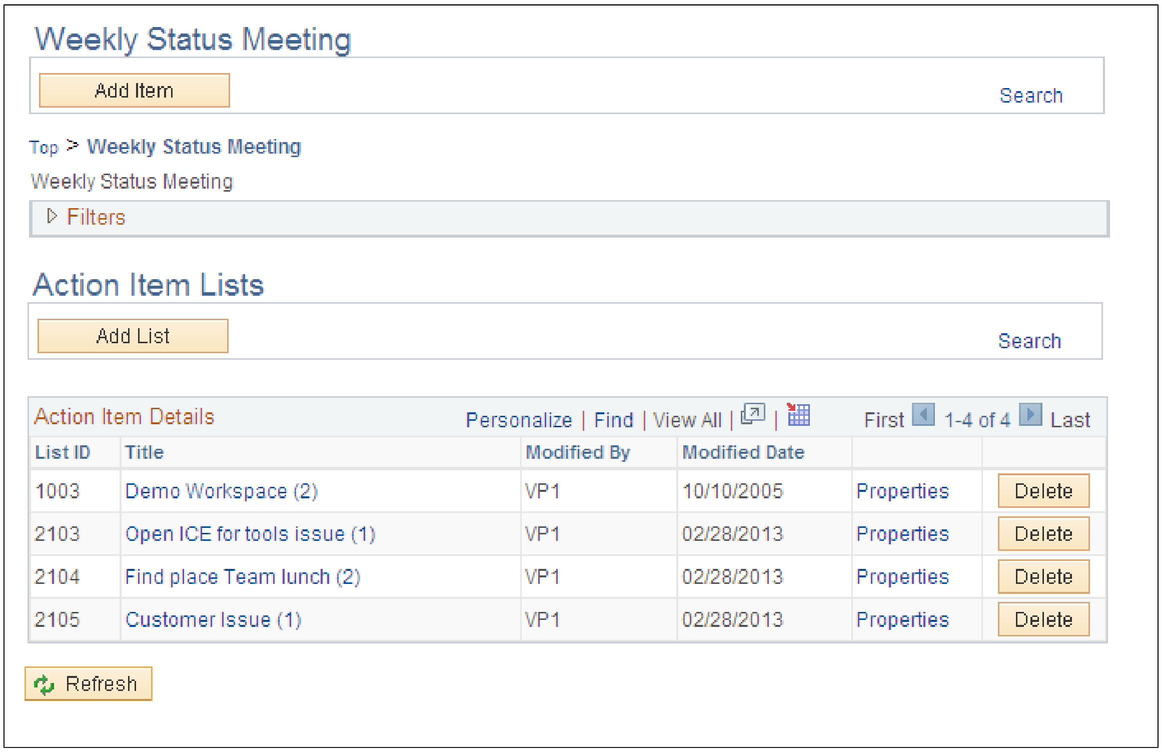
| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| Action Item Lists Homepage | EPPAI_BROWSE | View the action items in the list. |
| Action Item Details Page | EPPAI_ITEM_INFO | Define details for the action item. |
| Action Item Notification Page | EPPAI_ITEM_NOTIFY | Send notifications to list members. |
| Post Details Page | EPPDF_VIEW_TOPIC | Post and view discussion topics for an action item. |
| Action Items Change Log Page | EPPAI_CHANGE_LOG | View the change log for the action item. |
| Search Action Items Page | EPPAI_SEARCH | Search for action items. |

## Action Item Lists Homepage

**Image: <Action Item List> homepage**

Access the Action item list homepage (click the link for a list on the My Action Item Lists page) as shown below.

The following example illustrates the Weekly status meeting in Action item list homepage .




| | |
|---|---|
| **Add Item** | Click to access the Action Item Details page on which you can create a new action item. |
| **Search** | Click to access the Search Action Items page on which you can search for action items. |
| **Status** | Select the state or condition of the action items you want to select as your filter criteria. |
| **Category** | Select an action item category to use as filter criteria. |
| **Filter** | Click the Filter button to filter the list based on the selected criteria. |
| **Item ID** | The identifier that the system assigned to the action item. |
| **Title** | Click the item title to display the Action Item Details page and view the details of the action item. |
| **Priority** | The priority assigned to the action item |
| **Status** | The state or condition of the action item. |

| | |
|---|---|
| **Modified Date** | The date that the action item was last modified. |
| **Due Date** | The date that the action item is scheduled to be completed. |
| **Delete** | Click to delete the action item.<br><br>**Note:** This button appears only if you have delete privileges. |

## Action Item Details Page

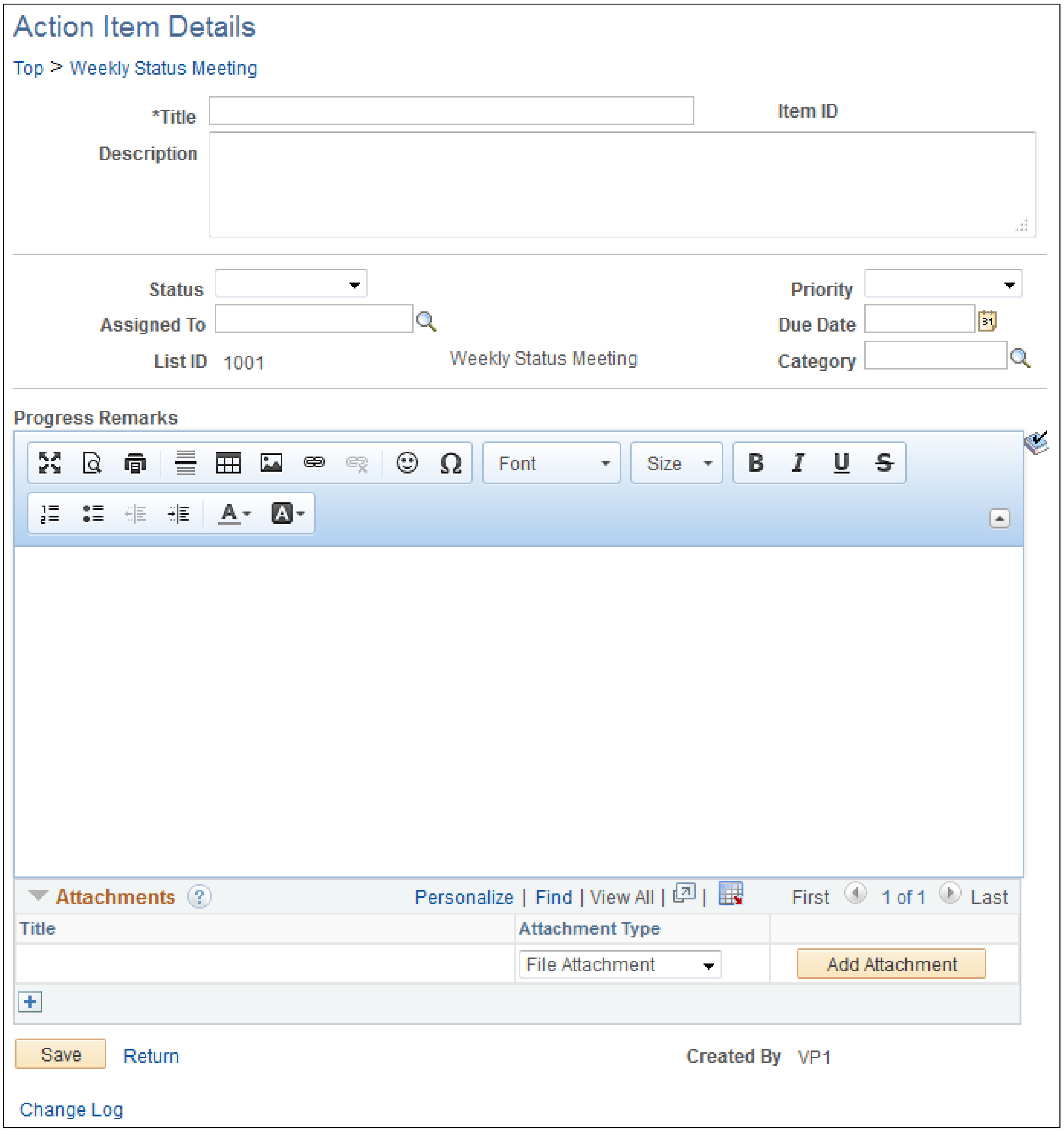
Use the Action Items Detail page (EPPAI_ITEM_INFO) to define details for the action item.

**Navigation**

- Click the Add Item button on the action item list homepage.
- Click the link for an action item on the action item list homepage.

**Image: Action Items Details page**

The following example illustrates the Action Items Details page.




Use the Action Items Details page to define the action item.

| | |
|---|---|
| **Top and <List Title>** | Click Top to access the My Action Item Lists page. Click list title link to access the action item list homepage. |
| **Title** | Enter the title for the action item. |

| | |
|---|---|
| **Item ID** | When the action item is saved, the system generates and displays a unique item ID. |
| **Description** | Enter a description of the task or activity. |
| **Status** | Select a value for the status of the action item.<br><br>**Note:** Completed action items do not appear in a pagelet for this action item list if one is published. Completed and cancelled action items can be filtered out of the action item list homepage, the Review Action Items page, and the Tasks pagelet when the filter is set to display *active* or *open* items only. |
| **Priority** | Select a priority for the action item: *High, Low,* or *Medium.* |
| **Assigned To** | Select an assignee from the list of all users in the system.<br><br>Initially, the lookup modal window displays all users with list members appearing at the top of the list. To find members of the list only, select *User Type* in the Search By drop-down and then select *Member Users* in the second drop-down list box.<br><br>**Note:** You must have edit privileges to be able to assign an action item to a user.<br><br>After you select an assignee, their profile name appears next to the Assigned To field. You can click the profile name to view the profile page for the user. |
| **Due Date** | Select a date from the calendar. By default, action items are displayed in order of their due dates.<br><br>**Note:** Action items must have an assigned due date to appear in the Upcoming Action Items pagelet in Workspaces. |
| **List ID** | The identification number of the current list appears in this field. If you have edit privileges, you can move the action item to another list by selecting another ID from the action item lists that you have access to.<br><br>**Note:** An action item can be associated with one list only. |
| **Category** | Select a category in the lookup modal window or enter a new one. When you save the action item, the new category is saved to the list of categories and is available across sites and lists. |
| **Progress Remarks** | Use the rich text editor to enter comments and updates regarding the action item. |
| **Completed By** | Select the ID of the person who completed the action item. |

The system automatically defaults to the user ID and profile of the person who changes the Status field to *Completed.*

| | |
|---|---|
| **Complete Date** | Select the date that the action item is completed.<br><br>The system automatically defaults to the date that the Status field is changed to *Complete*. |

### Attachments

Use this section of the page to add attachments to the action item. Attachment types include file attachments and managed content.

| | |
|---|---|
| **Attachment Type** | Select the type of attachment you want to include with the action item. Available values include:<br><br>*File Attachment.* Select to upload a local file.<br><br>*Managed Content.* Select to attach a piece of managed content from the content management system. |
| **Add Attachment** | If you have selected the *File Attachment* attachment type, click to access a modal window that enables you to browse directories for the file you want to attach. |
| **Select Content** | If you have selected the *Managed Content* attachment type, click to access the Look Up Managed Content page on which you can select the piece of managed content you want to attach. |

### Other Action Item Functions

| | |
|---|---|
| **Save** | Click to save changes to the action item. |
| **Return** | Click to return to the action item list. |
| **Change Log** | Click to view the log of changes made to this action item. |
| **Notify** | Click to send a notification to selected recipients. |
| **Start Discussion orView Discussion** | Click to start or view a discussion related to the action item. |
| **Add to Personal Calendar** | Click to add the action item to your personal calendar. |

## Action Item Notification Page

Use the Action Item Notification page (EPPAI_ITEM_NOTIFY) to send notifications to list members.

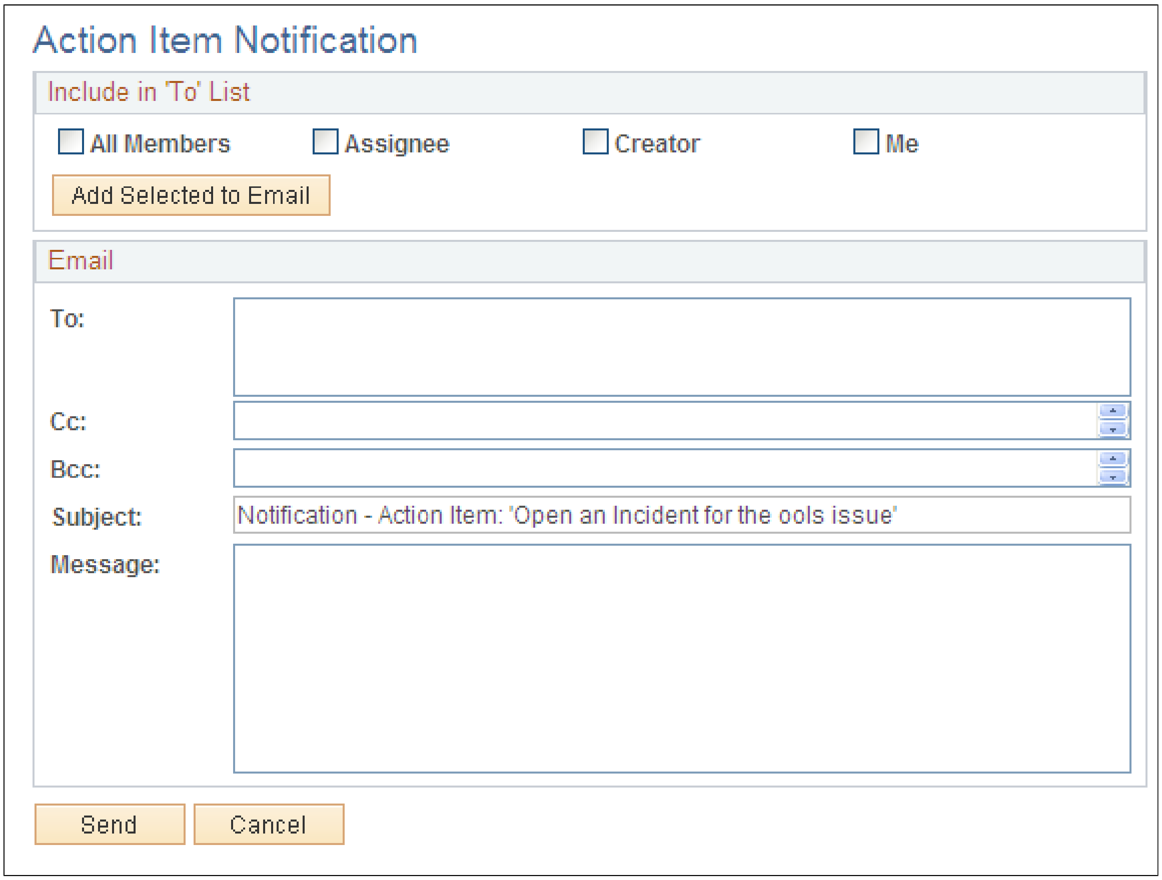
 

**Navigation**

Click the Notify link on the Action Item Details page.

**Image: Action Item Notification page**

The following example illustrates the Action Item Notification page.




Use the Action Item Notification page to send messages to users associated with the action item. Notifications can originate because notifications have been enabled for the list on the List Properties page or they can originate as ad hoc notifications after the user has selected the Notify link.

## Include in 'To' List

Select the people you want to receive the notification. Selecting any of these options populates the *To* field with the corresponding users from the list. Additionally, you can manually enter email addresses in the *To:* field.

---

**Note:** Addresses for the Cc: and Bcc: fields must be manually entered or copied and pasted from the To: field.

---

| | |
|---|---|
| **All Members** | Sends the notification to all members of the list. |
| **Assignee** | Sends the notification to the person to whom the action item has been assigned. |
| **Creator** | Sends the notification to the person who created the action item. |

| | |
|---|---|
| **Me** | Sends the notification to you. |
| **Add Selected to Email** | Populates the *To* field with email addresses of those people you have selected to receive the notification. |

### Email

Use this section of the page to enter additional address information as well as the text of the notification. The system displays the title of the action item as the subject of the notification.

| | |
|---|---|
| **To, Cc, or Bcc** | Manually enter additional email addresses in these fields. |
| **Subject** | Enter a subject for the email. A default subject is generated by the system. |
| **Message** | When sending an ad hoc notification, type the text of the message in this text box. The text appears in the email message along with a URL to the Action Item Detail page.<br><br>When the notification is created because notifications have been enabled on the List Properties page, the system populates the message text box with information stating who modified the item and what they changed. You can add any additional information by typing it after the system-generated text. |
| **Send** | Click to send the email notification. |

## Post Details Page

Use the Post Details page (EPPDF_VIEW_TOPIC) to post and view discussion topics for an action item.

**Navigation**

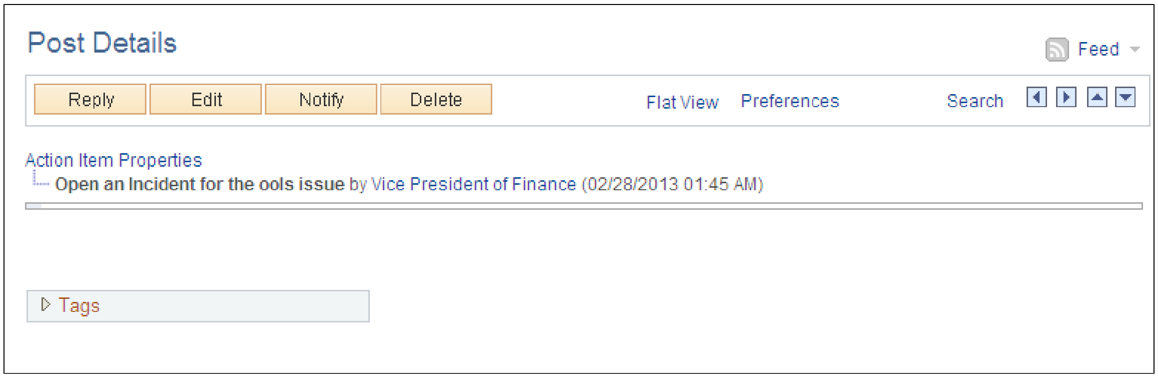
- Click the Start Discussion link on the Action Item Details page.

  Click Yes.

- Click the View Discussions link on the Action Item Details page.

**Image: Post Details page for an action item**

The following example illustrates the Post Details page for an action item.




The Post Details page starts a single-topic discussion forum for this action item. List members can edit the topic and post replies. If there is already a forum started for this item, the link on the Action Item Details page will display as View Discussion.

---

**Note:** Discussions started for an action item will not appear in the Discussion Forums pagelet.

---

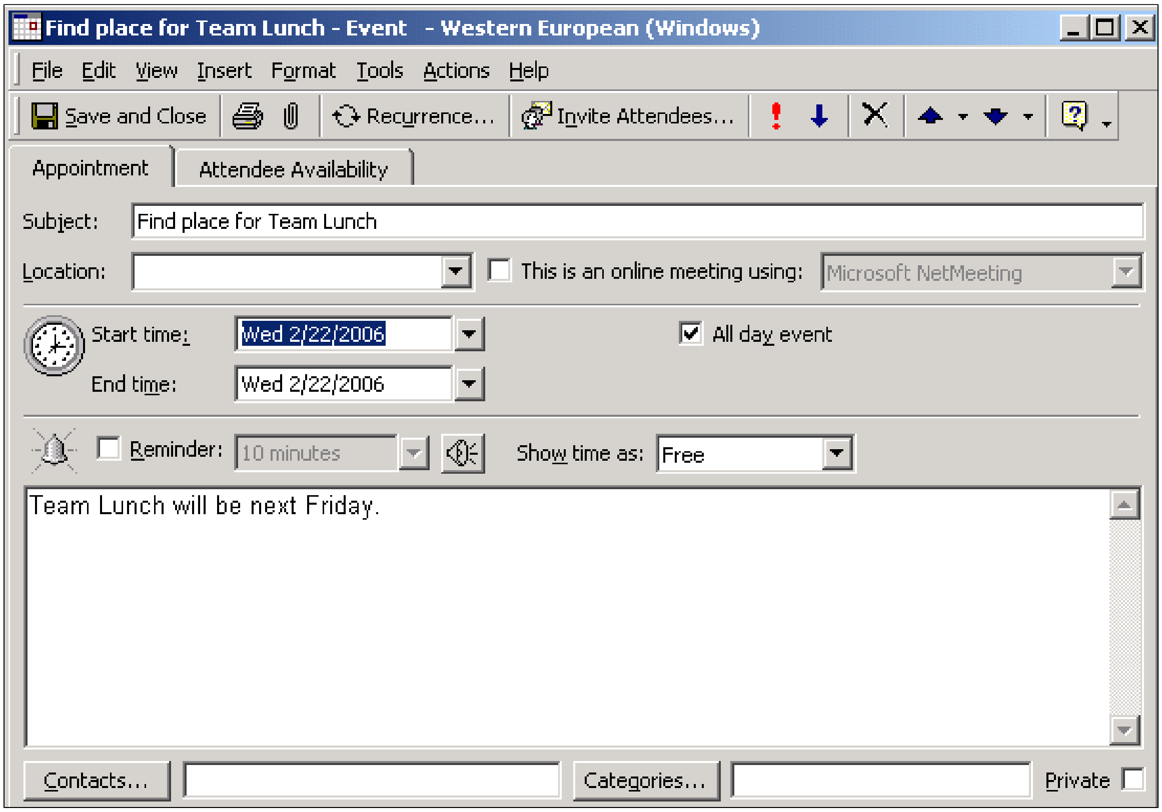
## Personal Calendar link Page

Click the Add to Personal Calendar link on the Action Item Details page.

Depending on the options defined in the Installation Options page, the system can either create a calendar event that you can save to your default calendar application or it can send you an email that you can add to your calendar. The remarks appear in the body of the calendar event and the title field is the subject of the calendar event.

**Image: Calendar entry generated for an action item**

The following example illustrates the Personal Calendar link page.




## Action Items Change Log Page

Use the Action Items Change Log page (EPPAI_CHANGE_LOG) to view the change log for the action item.

**Navigation**

Click the Change Log link on the Action Item Details page.

Use the Action Items Change Log page to review and audit all changes associated with the action item, including who made the change and when they made it.

## Search Action Items Page

Use the Search Action Items page (EPPAI_SEARCH) to search for action items.

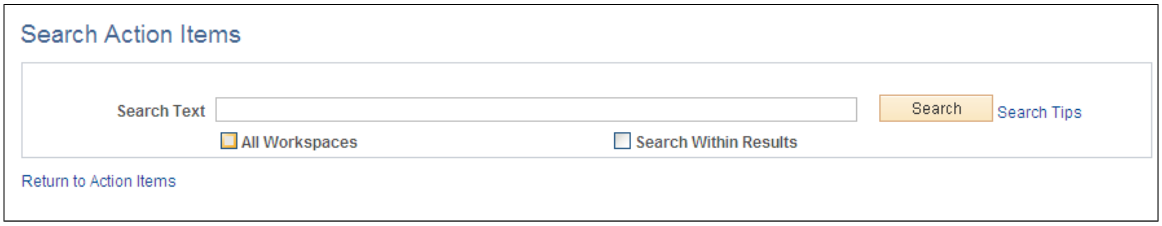
 

**Navigation**

- Click the Search link on the action item list homepage.
- Click the Search link on the My Action Item Lists page.

**Image: Search Action Items page**

The following example illustrates the Search Action Items page. Access the Search Action Items Page (click the Search link on the action item list homepage, or click the Search link on the My Action Item Lists page) as shown below.




Use the Search Action Items page to search for action items to which you have access.

**Search Text** — Enter the text query in the Search Text field.

**Search Tips** — Click Search Tips to get more information about searching action items.

**Search In** — Select a scope to search for action items. Available options are:

- *Current List* searches in the list you are currently in.
- *Current Site* searches all lists that you have access to in the site you are currently in.
- *All Lists and Sites* searches all the lists in all of the sites that you have access to.

# Reviewing Action Items

This topic discusses how to filter and review action items across all action item lists.

## Page Used to Review Action Items

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
| --- | --- | --- |
| Review Action Items Page | EPPAI_INQUIRY | Review action items from all lists of which you are a member |

## Review Action Items Page

Use the Review Action Items page (EPPAI_INQUIRY) to .

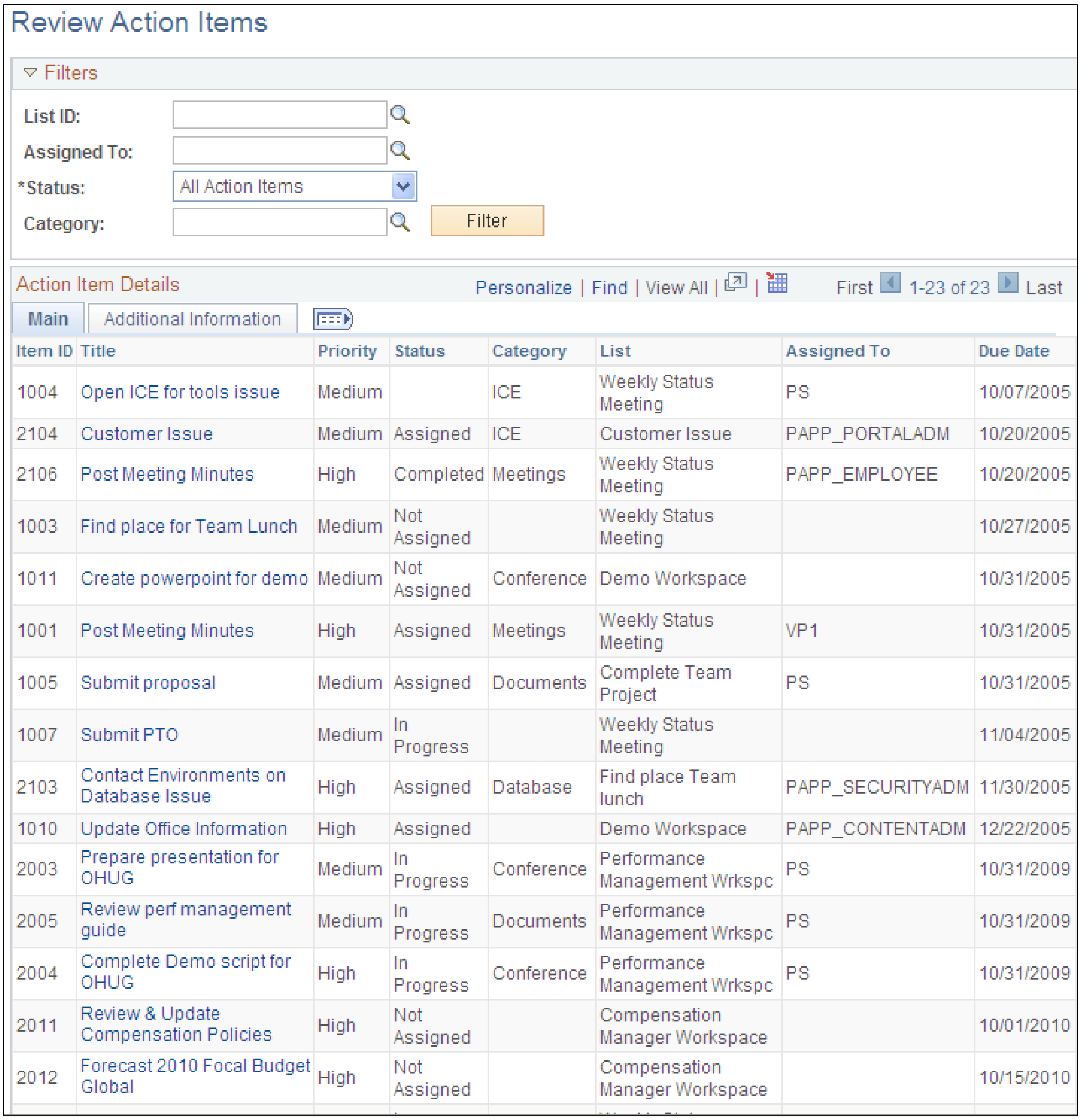
 

**Navigation**

My Content, Review Action Items

**Image: Review Action Items page - Main tab**

The following example illustrates the Review Action Items page - Main tab.




| Item ID | Title | Priority | Status | Category | List | Assigned To | Due Date |
|---|---|---|---|---|---|---|---|
| 1004 | Open ICE for tools issue | Medium | | ICE | Weekly Status Meeting | PS | 10/07/2005 |
| 2104 | Customer Issue | Medium | Assigned | ICE | Customer Issue | PAPP_PORTALADM | 10/20/2005 |
| 2106 | Post Meeting Minutes | High | Completed | Meetings | Weekly Status Meeting | PAPP_EMPLOYEE | 10/20/2005 |
| 1003 | Find place for Team Lunch | Medium | Not Assigned | | Weekly Status Meeting | | 10/27/2005 |
| 1011 | Create powerpoint for demo | Medium | Not Assigned | Conference | Demo Workspace | | 10/31/2005 |
| 1001 | Post Meeting Minutes | High | Assigned | Meetings | Weekly Status Meeting | VP1 | 10/31/2005 |
| 1005 | Submit proposal | Medium | Assigned | Documents | Complete Team Project | PS | 10/31/2005 |
| 1007 | Submit PTO | Medium | In Progress | | Weekly Status Meeting | | 11/04/2005 |
| 2103 | Contact Environments on Database Issue | High | Assigned | Database | Find place Team lunch | PAPP_SECURITYADM | 11/30/2005 |
| 1010 | Update Office Information | High | Assigned | | Demo Workspace | PAPP_CONTENTADM | 12/22/2005 |
| 2003 | Prepare presentation for OHUG | Medium | In Progress | Conference | Performance Management Wrkspc | PS | 10/31/2009 |
| 2005 | Review perf management guide | Medium | In Progress | Documents | Performance Management Wrkspc | PS | 10/31/2009 |
| 2004 | Complete Demo script for OHUG | High | In Progress | Conference | Performance Management Wrkspc | PS | 10/31/2009 |
| 2011 | Review & Update Compensation Policies | High | Not Assigned | | Compensation Manager Workspace | | 10/01/2010 |
| 2012 | Forecast 2010 Focal Budget Global | High | Not Assigned | | Compensation Manager Workspace | | 10/15/2010 |

Use the Review Action Items page to filter and review all action items to which you have access. The results include action items from all portals, sites, and workspaces.

## Filters

Select any combination of the available filters to narrow the list of action items. Available values are List ID, Assigned To, Status, and Category.

Click the Refresh button to execute the search.

---

**Note:** Action items with a status of completed or cancelled are considered inactive, and do not display when the filter is set for active action items.

---

## Main Tab

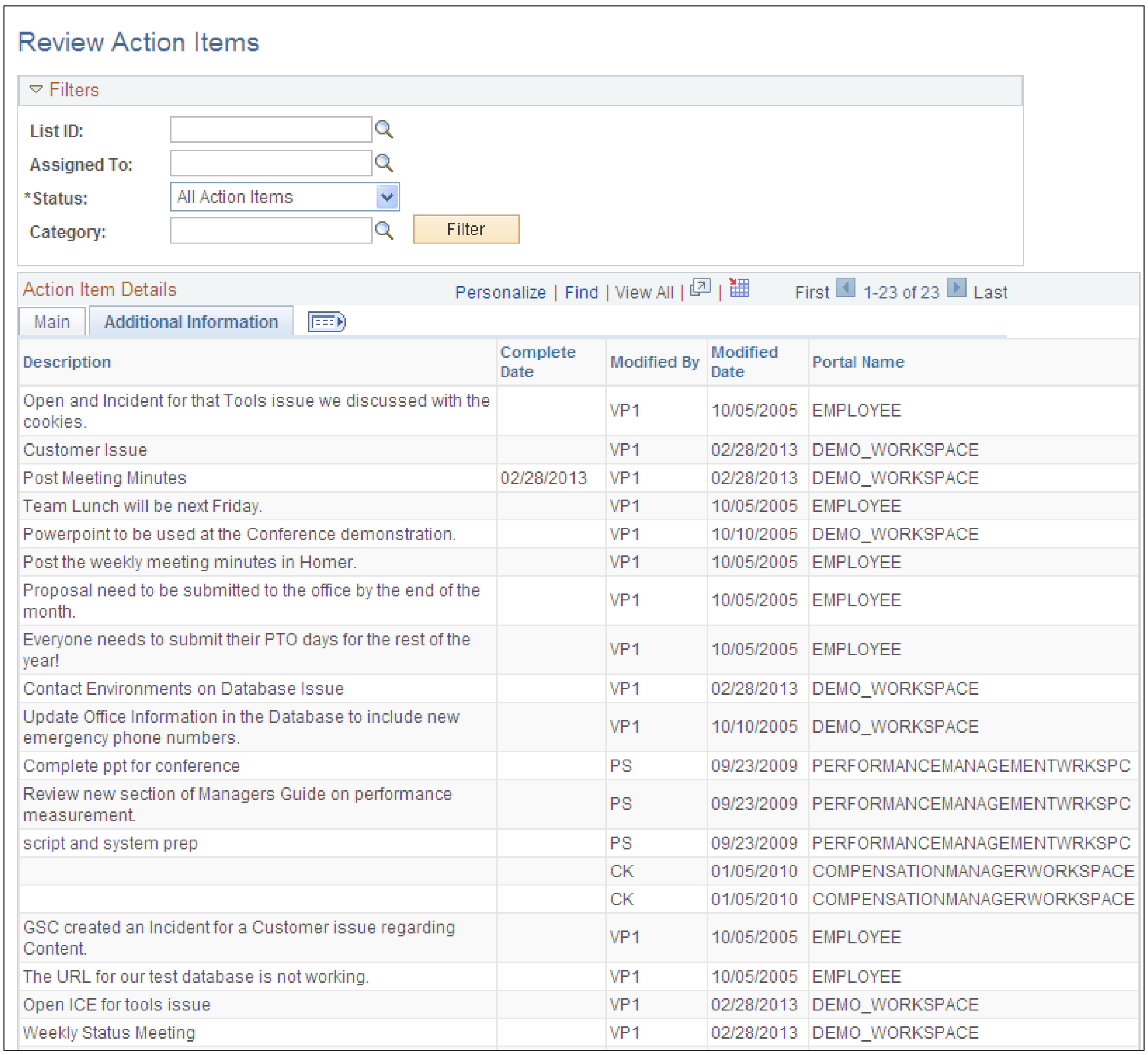
The Main tab displays the basic information about each action item. Click the title of the action item to view the Action Items Detail page.

## Additional Information Tab

Access the Additional Information tab (select Additional Information on the Main tab).

**Image: Review Action Items page - Additional Information tab**

The following example illustrates the Review Action Items page - Additional Information tab. Access the Additional Information tab (select Additional Information on the Main tab) as shown below.




| Description | Complete Date | Modified By | Modified Date | Portal Name |
|---|---|---|---|---|
| Open and Incident for that Tools issue we discussed with the cookies. | | VP1 | 10/05/2005 | EMPLOYEE |
| Customer Issue | | VP1 | 02/28/2013 | DEMO_WORKSPACE |
| Post Meeting Minutes | 02/28/2013 | VP1 | 02/28/2013 | DEMO_WORKSPACE |
| Team Lunch will be next Friday. | | VP1 | 10/05/2005 | EMPLOYEE |
| Powerpoint to be used at the Conference demonstration. | | VP1 | 10/10/2005 | DEMO_WORKSPACE |
| Post the weekly meeting minutes in Homer. | | VP1 | 10/05/2005 | EMPLOYEE |
| Proposal need to be submitted to the office by the end of the month. | | VP1 | 10/05/2005 | EMPLOYEE |
| Everyone needs to submit their PTO days for the rest of the year! | | VP1 | 10/05/2005 | EMPLOYEE |
| Contact Environments on Database Issue | | VP1 | 02/28/2013 | DEMO_WORKSPACE |
| Update Office Information in the Database to include new emergency phone numbers. | | VP1 | 10/10/2005 | DEMO_WORKSPACE |
| Complete ppt for conference | | PS | 09/23/2009 | PERFORMANCEMANAGEMENTWRKSPC |
| Review new section of Managers Guide on performance measurement. | | PS | 09/23/2009 | PERFORMANCEMANAGEMENTWRKSPC |
| script and system prep | | PS | 09/23/2009 | PERFORMANCEMANAGEMENTWRKSPC |
| | | CK | 01/05/2010 | COMPENSATIONMANAGERWORKSPACE |
| | | CK | 01/05/2010 | COMPENSATIONMANAGERWORKSPACE |
| GSC created an Incident for a Customer issue regarding Content. | | VP1 | 10/05/2005 | EMPLOYEE |
| The URL for our test database is not working. | | VP1 | 10/05/2005 | EMPLOYEE |
| Open ICE for tools issue | | VP1 | 02/28/2013 | DEMO_WORKSPACE |
| Weekly Status Meeting | | VP1 | 02/28/2013 | DEMO_WORKSPACE |

The Additional Information tab shows the description of the items including the portal name as well as the targeted completion date and the user ID and timestamp of the most recent modification to the item.

# Working With the Tasks and Tasks Pagelet

This discusses personalizing, using the Tasks pagelet and managing your tasks.

## Pages Used to Work With Tasks and the Tasks Pagelet

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| Personalize Tasks Page | EO_PE_TASK_PREF | Set display preferences for your Tasks pagelet. |
| Task Details Page | EO_PE_TASK_DTL | Add personal tasks to your Tasks pagelet. View and edit personal task details. |
| Tasks Page | EO_PE_TASK_LIST | Manage your personal tasks in a real-time view. Relevant worklist task updates display on this page after the Worklist Replicate process is run. |

## Understanding Tasks and the Tasks Pagelet

The Tasks pagelet is a delivered pagelet that displays a consolidated list of all of your action items and tasks based on the preferences that you specify for the pagelet. The Tasks pagelet and related pages provide you with access to personal tasks, worklist items, and action items that are assigned to you. *Personal tasks* are those tasks you add to your task list using the Task Details page. *Worklist items* are those tasks that have been routed to you by way of PeopleSoft Workflow. *Action items* are those assignments that are related to a PeopleSoft Interaction Hub action item list.

**Note:** The Tasks pagelet displays only items associated with the current user signed in to the system.

See the product documentation for *PeopleTools: Applications User's Guide*

## Personalize Tasks Page

Use the Personalize Tasks page (EO_PE_TASK_PREF) to set display preferences for your Tasks pagelet.

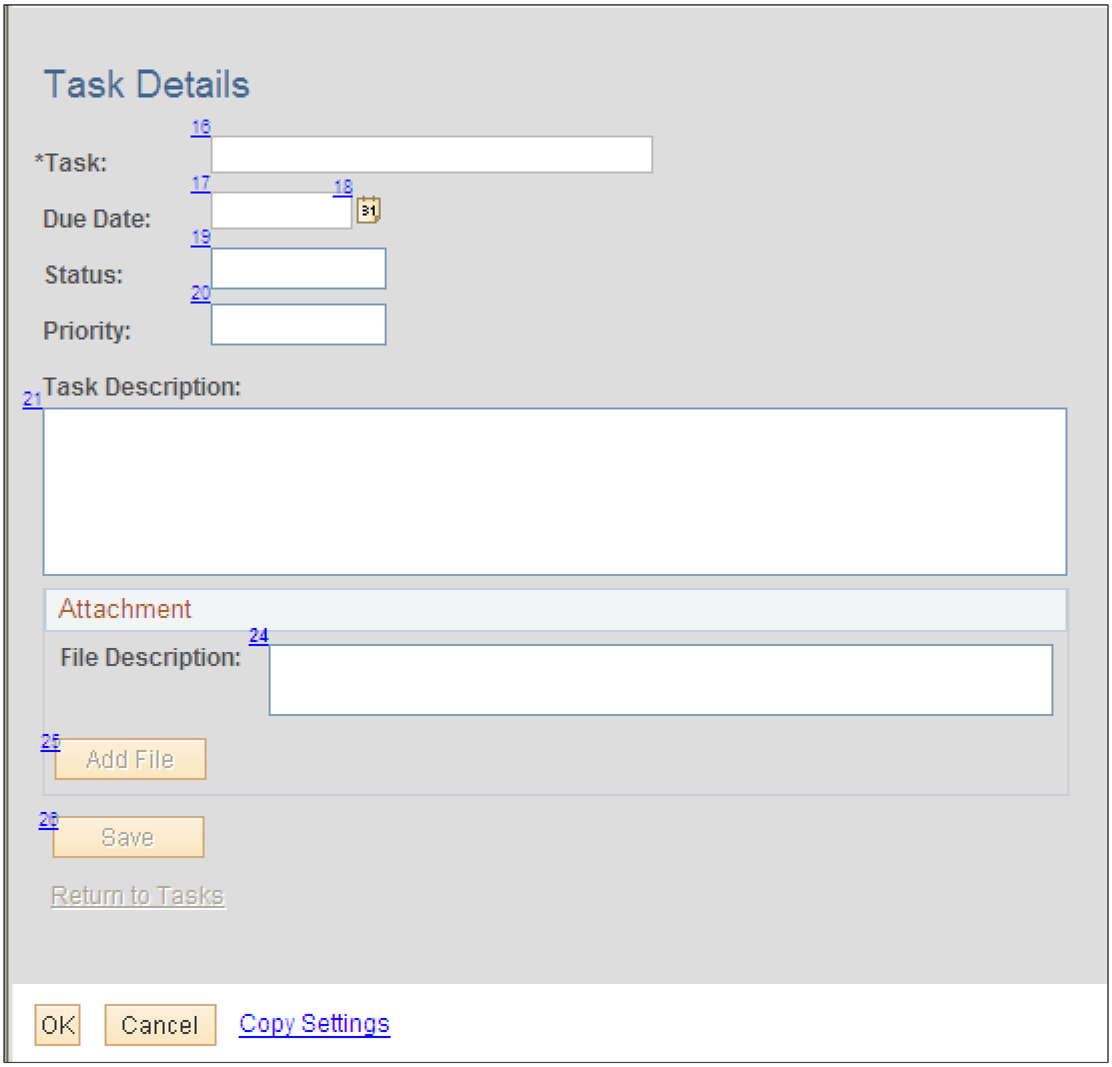
 

### Navigation

Click the Customize Tasks button on the Tasks pagelet.

**Image: Personalize Tasks Page**

The following example illustrates the Personalize Tasks page.




**Tasks Displayed**

Specify the type of tasks that display on your Tasks pagelet.

- *All Action Items* — Select to display all action items assigned to you.
- *All Personal Tasks* — Select to display all your personal tasks.
- *All Tasks* — Select to display all tasks, worklist items, and action items assigned to you.
- *All Worklist Items* — Select to display all worklist items assigned to you.

- *Open Action Items* — Select to display all action items that are open or active. Tasks with a status of complete or cancelled are not considered open, and therefore do not display.
- *Open Personal Tasks* — Select to display all personal tasks that are not complete.
- *Open Tasks* — display all tasks, worklist items, and action items that are open.
- *Open Worklist Items* — Select to display all worklist items that are not complete.

**Max Number of Displayed Rows (maximum number of displayed rows)**

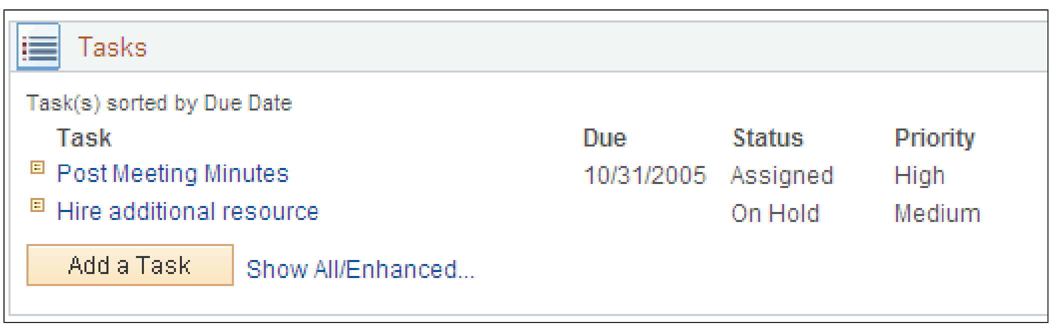
Specify the maximum number of tasks you want to display on your Tasks pagelet. If you do not select a value, all matching tasks display.

## Tasks pagelet on the portal homepage

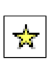
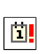
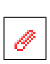
Access the Tasks pagelet on the portal homepage.

**Image: Tasks pagelet**

The following example illustrates the Tasks Pagelet. Access the Tasks pagelet on the portal homepage as shown below.




Use the Tasks pagelet to review your personal tasks, worklist items, and action items assigned to you.

| | |
|---|---|
|  | Indicates a worklist item. |
|  | Indicates an action item. |
|  | Indicates a personal task. |
|  | Appears for a worklist task that you have not yet accessed. |
|  | Appears for a personal task or worklist item that is overdue. |
|  | Appears for a task when it has an associated file attachment. |

| | |
|---|---|
| **Task** | Displays the name of the task:<br>• Click a personal task to access the Task Details page on which you can view and enter detailed task information.<br>• Click a worklist task to access the associated transaction page.<br>• Click an action item to access the Action Item Details page |
| **Due** | Displays the due date defined for the task. Tasks in the Task pagelet are sorted by due date. |
| **Status** | Displays the status of the task.<br>**Note:** The Status column does not display if your Tasks pagelet is in a narrow page column. If this column does not display, you may view it by accessing the Tasks page, which displays all available task description columns. |
| **Priority** | Displays the priority of the task.<br>**Note:** The Priority column does not display if your Tasks pagelet is in a narrow page column. If this column does not display, you may view it by accessing the Tasks page, which displays all available task description columns. |
| **Add a Task** | Click to access the Task Details page on which you can add a personal tasks to your task list. |
| **Show All/Enhanced... or More...** | Click to access the Tasks page on which you can view and access details about your personal tasks, worklist items, and action items. |

## Task Details Page

Use the Task Details page (EO_PE_TASK_DTL ) to add personal tasks to your Tasks pagelet.

View and edit personal task details.

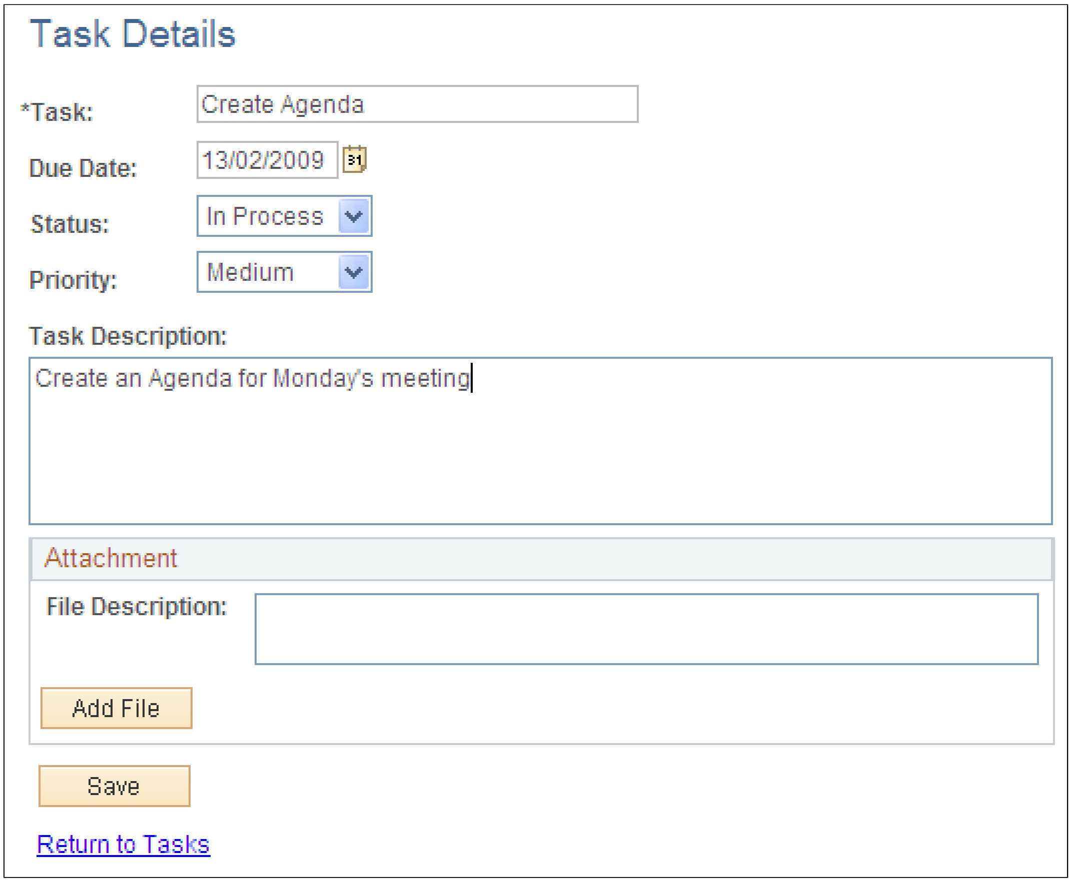
 

**Navigation**

- Click the Add a Task button on the Tasks pagelet.
- Click a task link on the Tasks page.

**Image: Task Details page**

The following example illustrates the Task Details page.




| | |
|---|---|
| **Task** | Enter the task name. |
| **Due Date** | Enter the due date of the task. |
| **Status** | Select a task status. |

- *Complete* — Select for a task that has been completed. Selecting this value makes the task inactive. Inactive tasks do not display in *open* status views on the Tasks pagelet and Tasks page.
- *In Process* — Select for a personal task that has been started, but not completed.
- *New* — Select for a new personal task.
- *On Hold* — Select to place a task on hold.

| | |
|---|---|
| **Priority** | Select a priority for the task: *High*, *Low*, or *Medium*. |
| **Task Description** | Enter a description of the task. |
| **File Name** | When an attachment is present, select the file name link to open the file. |
| **Delete** | If an attachment is present, click this Delete button to delete the attachment. |
| **File Description** | Enter a description of the attachment. |
| **Add File** | Click to add an attachment.<br><br>**Note:** Unlike action items, you can add one attachment only to tasks. |
| **Save** | Click to save the current task. |
| **Delete** | Click to delete the current task. You will are prompted to confirm the deletion. |

## Tasks Page

Use the Tasks page (EO_PE_TASK_LIST) to manage your personal tasks in a real-time view.

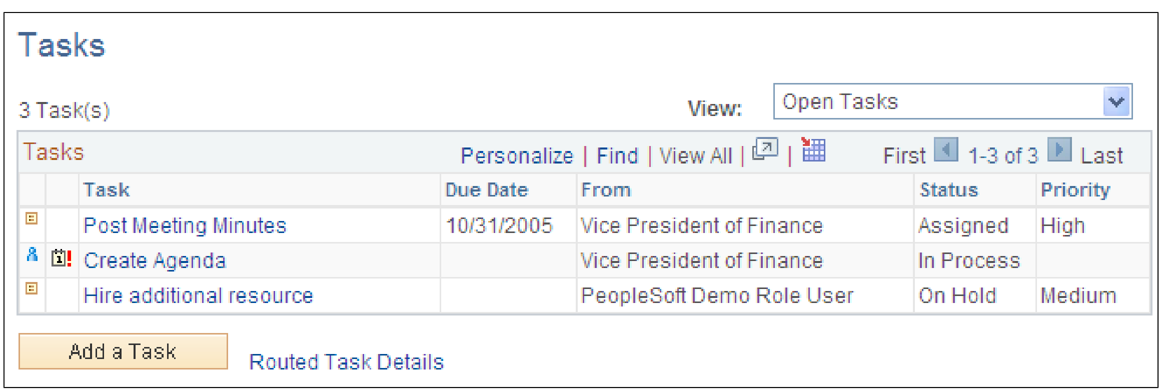
Relevant worklist task updates display on this page after the Worklist Replicate process is run.

**Navigation**

- Click the Show All/Enhanced... link or the More... link in the Tasks pagelet.
- Click the Return to Tasks link on the Task Details page.

**Image: Tasks page**

The following example illustrates the Tasks page. Access the Tasks page (click the Show All/Enhanced... link or More... link in the Tasks pagelet) as shown below.




Use the Tasks page to manage your personal tasks, worklist items, and action items assigned to you. The Tasks page displays the same items available to you in the Tasks pagelet.

**View**

Specify the type of tasks that display on the Tasks page:

- *All Action Items* — Select to display all action items assigned to you.
- *All Personal Tasks* — Select to display all your personal tasks.
- *All Tasks* — Select to display all tasks, worklist items, and action items assigned to you.
- *All Worklist Items* — Select to display all worklist items assigned to you.
- *Open Action Items* — Select to display all action items that are open or active. Tasks with a status of complete or cancelled are not considered open, and therefore do not display.
- *Open Personal Tasks* — Select to display all personal tasks that are not complete.
- *Open Tasks* — display all tasks, worklist items, and action items that are open.
- *Open Worklist Items* — Select to display all worklist items that are not complete.

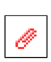
Indicates a worklist item.

Indicates an action item.

Indicates a personal task.

Appears for a worklist task that you have not yet accessed.

Appears for a personal task or worklist item that is overdue.



Appears for a task when it has an associated file attachment.

**Task**

Displays the name of the task:

- Click a personal task to access the Task Details page on which you can view and enter detailed task information.
- Click a worklist task to access the associated transaction page.
- Click an action item to access the Action Item Details page

**Due Date**

Displays the due date defined for the item.

**From**

Displays the user who created the item.

| | |
|---|---|
| **Status** | Displays the status of the item. |
| **Priority** | Displays the priority of the item. |
| **Add a Task** | Click to access the Task Details page on which you can add a personal tasks to your task list. |
| **Routed Task Details** | Click to access the Worklist page showing the details of your worklist items.<br><br>See the product documentation for *PeopleTools: Applications User's Guide*, “Using Workflow,” Sending and Receiving Notifications, Using Worklists to Receive Notifications. |

# Administering Action Item Lists

This topic discusses administering and modifying privileges for action item lists.

## Pages Used to Administer Action Item Lists

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| Administer Action Item Lists Page | EPPAI_ADMIN | Manage action item lists and member privileges. |
| Administer Action Item Lists - Edit Privileges Page | EPPAI_LIST_PRIV | Manage privileges for members of an action item list. |

## Administer Action Item Lists Page

Use the Administer Action Item Lists page (EPPAI_ADMIN) to manage action item lists and member privileges.

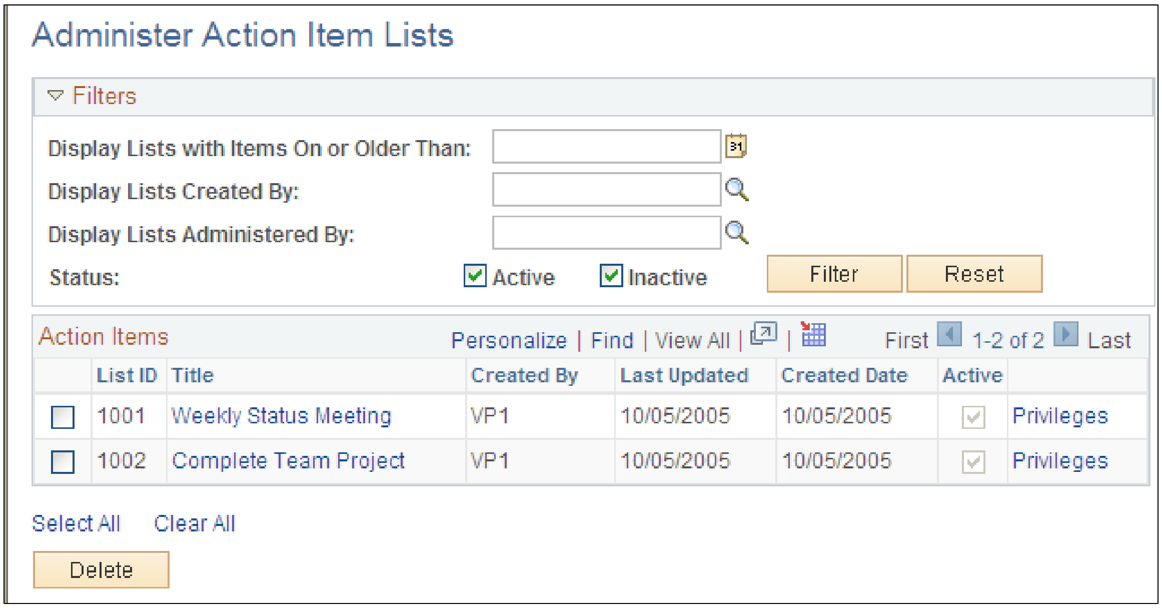
 

**Navigation**

Portal Administration, Administer Action Items

**Image: Administer Action Item Lists page**

The following example illustrates the Administer Action Item Lists page.




Use the Administer Action Item Lists page to manage action item lists and member privileges.

| | |
|---|---|
| **Display Lists with Items On or Older Than** | Select a date to find lists with items that were created on or before the date you specify. |
| **Display Lists Created By** | Select a user ID to return all lists that the user has created. |
| **Display Lists Administered By** | Select a user ID to return all lists where the specified user is an administrator. |
| **Status** | Select to search for active or inactive lists, or both. |
| **Filter** | Click to filter the list of action item lists. |
| **Reset** | Click to clear the filter criteria. |
| **List ID** | The system displays the ID of the action item list. |
| **Title** | Click the title of the list to access the action item list homepage. |
| **Privileges** | Click the Privileges link to access the Edit Privileges page. |
| **Select All or Clear All** | Click a link to select or clear the selection of all action item lists. |
| **Delete** | Click to delete the selected action item list or lists. |

## Administer Action Item Lists - Edit Privileges Page

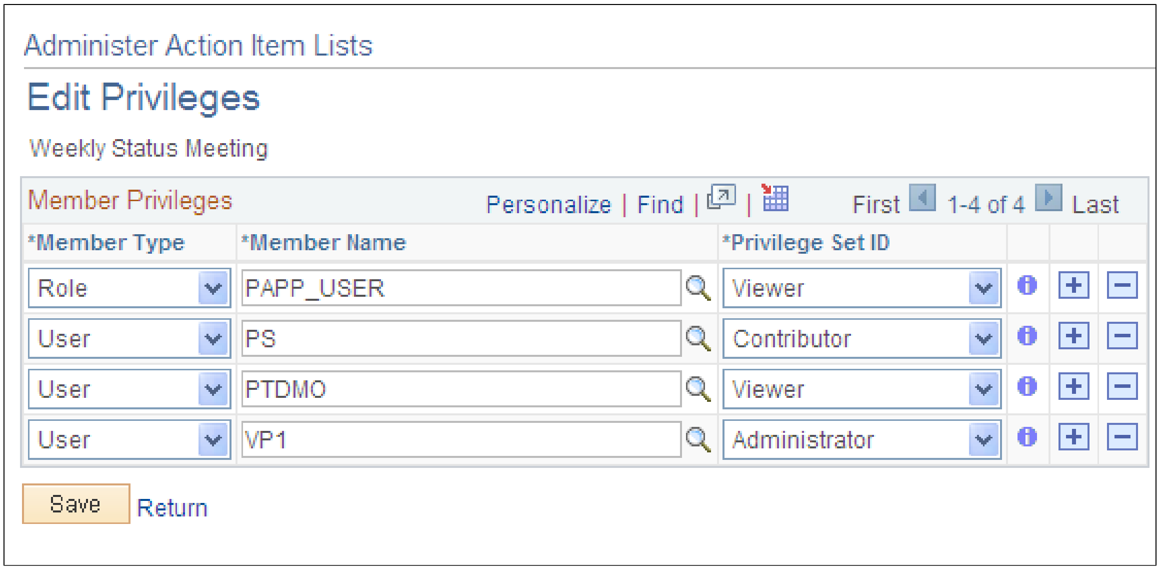
Use the Administer Action Item Lists - Edit Privileges page (EPPAI_LIST_PRIV) to manage privileges for members of an action item list.

**Navigation**

Click the  Privilegeslink on the Administer Action Item Lists page.

**Image: Administer Action Item Lists - Edit Privileges page**

The following example illustrates the Administer Action Item Lists - Edit Privileges page.




Use the Administer Action Item Lists - Edit Privileges page to assign list members and privileges similar to the List Privileges page.

See List Security Page .

# Publishing an Action Item List as a Pagelet

This topic discusses publishing a pagelet from action item list and publishing an action item ist from pagelet Wizard.

## Pages Used to Publish Action Item Lists as Pagelets

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| List Properties - Publish Pagelet Wizard Definition Page | EPPPB_PGLT_PUB | Create a pagelet definition for an action item list. |
| Pagelet Wizard - Specify Pagelet Information Page | PTPPB_WIZ_INFO | Provide information to identify and categorize a pagelet.<br><br>See Step 1 in Publishing Action Item Pagelet Using the Wizard. |

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| Pagelet Wizard - Select Data Source Page | PTPPB_WIZ_DATASRC | Select the type of data source for the pagelet.<br><br>See Step 2 in Publishing Action Item Pagelet Using the Wizard. |
| Pagelet Wizard - Specify Data Source Parameters Page | PTPPB_WIZ_DATAPRMS | Configure the data source parameters that are required for data to be displayed in the pagelet.<br><br>This page is accessible only when you are building a pagelet with a data source that allows modification of associated parameters.<br><br>See Step 3 in Publishing Action Item Pagelet Using the Wizard. |
| Pagelet Wizard - Specify Data Source Parameter Values Page | PTPPB_WIZ_PRMVALS | Specify prompt values for the end user to select from when personalizing the pagelet.<br><br>This page is accessible only for data source parameters for which you have selected the *User Specified* or *Admin Specified* usage types.<br><br>See Step 3 in Publishing Action Item Pagelet Using the Wizard. |
| Pagelet Wizard - Select Display Format Page | PTPPB_WIZ_DISPFRMT | Specify the data transformation method and display format for the pagelet.<br><br>See Step 4 in Publishing Action Item Pagelet Using the Wizard. |
| Pagelet Wizard - Specify Display Options Page | PTPPB_WIZ_DISP_CUS | Enter the custom formatting details for the pagelet as well as header and footer options. Preview the pagelet.<br><br>See Step 5 in Publishing Action Item Pagelet Using the Wizard. |
| Pagelet Wizard - Specify Publishing Options Page | PTPPB_WIZ_PUBOPT | Specify the manner in which the pagelet is published. Provide registration, caching, and security details, and register the pagelet.<br><br>See Step 6 in Publishing Action Item Pagelet Using the Wizard. |
| Pagelet Wizard - Pagelet Creation Confirmed Page | PTPPB_WIZ_FINISH | Confirm that the creation of the pagelet is complete.<br><br>See Step 6 in Publishing Action Item Pagelet Using the Wizard. |

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| List Properties - Publish as Pagelet Page | EPPPB_PGLT_LST | Administer pagelet definitions for an action item list. |
| Publish to Multiple Portals Page | PTPP_PMPUBPRTL | Publish the pagelet definition to additional portals and sites. |
| Publish Multiple Pagelets | PTPP_PMPUBPGLT | Publish multiple pagelet definitions to another portal or site.<br><br>See Publish to Multiple Portals Page. |

## List Properties - Publish Pagelet Wizard Definition Page

Use the List Properties - Publish Pagelet Wizard Definition page (EPPPB_PGLT_PUB) to create a pagelet definition for an action item list.

**Navigation**

- My Content, My Action Item Lists

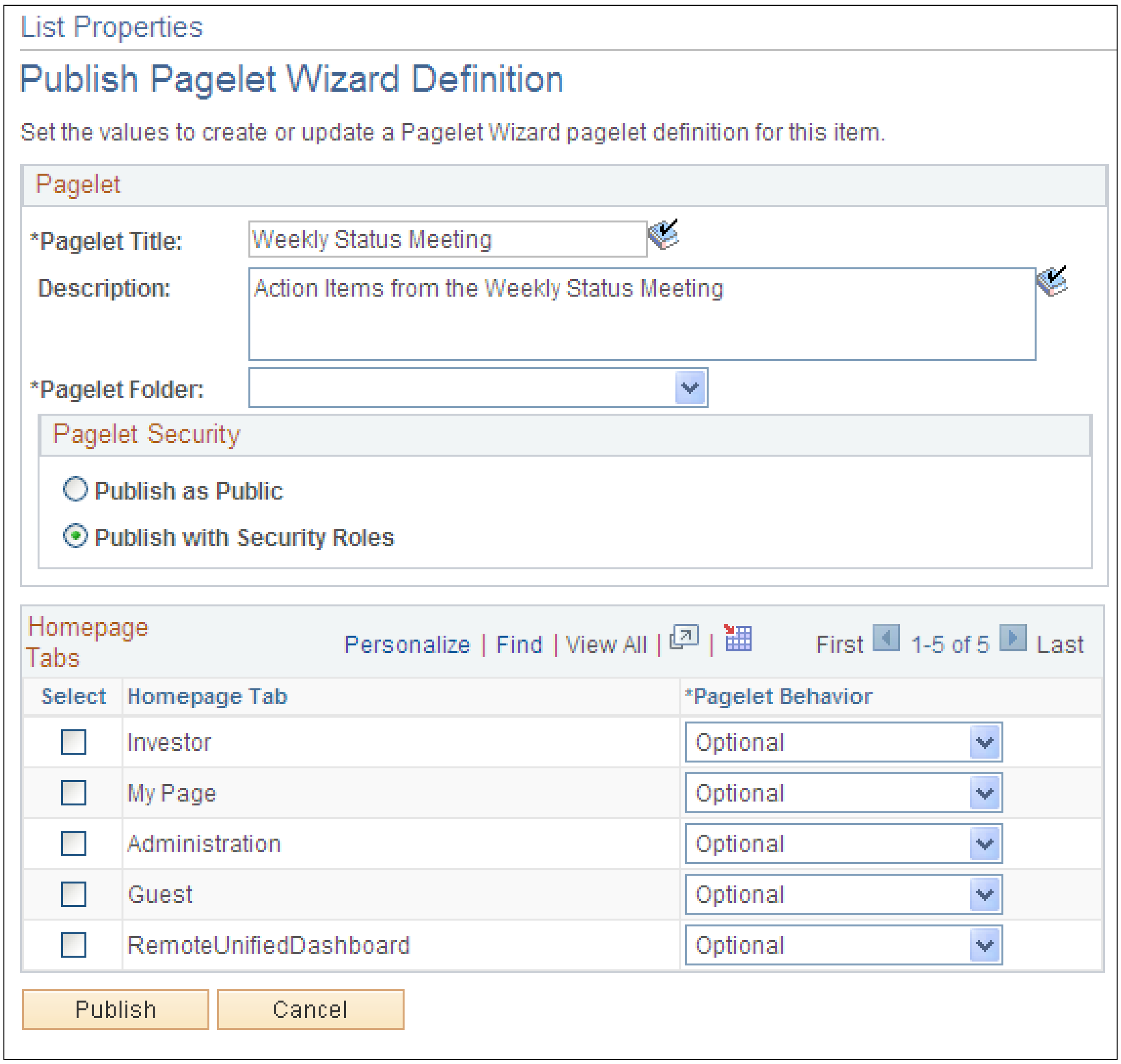
  Click the Properties link for the action item list.

  Click the Publish as Pagelet link on the List Properties page.

- Click the Add Pagelet button or the Edit button on the List Properties - Publish as Pagelet page.

**Image: List Properties - Publish Pagelet Wizard Definition Page**

The following example illustrates the List Properties - Publish Pagelet Wizard Definition page. Access the List Properties - Publish Pagelet Wizard Definition page (click the Publish as Pagelet link on the List Properties page) as shown below.




Use the List Properties - Publish Pagelet Wizard Definition page to create a pagelet definition for an action item list.

## Pagelet

The pagelet title and description from the List Properties page appear in the Pagelet group box. You can edit these two fields, if necessary.

**Pagelet Title**

Displays the title for the action item list, which can be edited as the title for the pagelet.

**Description**

Displays the description for the action item list, which can be edited as the description for the pagelet.

**Pagelet Folder**

Select a folder to publish to. Only folders from the current site are available to select.

**Pagelet Security**

Select the security options for viewing the pagelet. Available options are:

*Publish as Public*, which enables all users to view the pagelet.

*Publish with Security Roles*, which uses the roles defined on the List Security page when publishing the pagelet.

---

**Note:** If there are no roles defined on the List Security page, the system automatically selects to publish the pagelet as public.

---

## Homepage Tabs

Use this group box to define the homepage tab labels and behavior for the pagelet.

**Homepage Tab**

Select the tabs that will display the pagelet.

**Pagelet Behavior**

Select the behavior options for the pagelet.

*Optional*. The pagelet will not automatically appear on the homepage. However, it is available for selection when users personalize their homepages. This setting should not be used for guest homepage pagelets because guest users do not have personalization privileges.

*Optional-Default*. The pagelet will appear on all user homepages if they have access to the pagelet. The pagelet can be removed when users personalize their homepages. This setting should not be used for guest homepage pagelets because guest users do not have personalization privileges.

*Required-Fixed*. The pagelet will appear on all user homepages if they have access to the pagelet. The placement of the pagelet cannot be changed and the pagelet cannot be removed from the homepage.

*Required*. The pagelet will appear on all user homepages if they have access to the pagelet. The placement of the pagelet can be changed, but it cannot be removed from the homepage.

| | |
|---|---|
| **Publish** | Click the Publish button to publish this pagelet and display the List Properties - Publish as Pagelet page, on which you can review or edit the pagelet definition |

## Publishing Action Item Pagelet Using the Wizard

Pagelets for action item lists can be created and published using Pagelet Wizard and then managed from the List Properties page. This section provides an overview of how to use Pagelet Wizard to complete the following six steps:

- Step 1: Entering Pagelet Identifying Information.
- Step 2: Selecting a Pagelet Data Source.
- Step 3: Specifying Data Source Parameters.
- Step 4: Selecting a Pagelet Display Format.
- Step 5: Specifying Pagelet Display Options.
- Step 6: Specifying Pagelet Publication Options.

---

**Note:** If you access Pagelet Wizard from the Go to Pagelet Wizard link, you will be modifying an existing pagelet definition. If you want to create a new pagelet definition, start from the Portal Administration or PeopleTools navigation path.

---

Where appropriate, this section provides details specific to using Pagelet Wizard to publish an action item list as a pagelet.

See the product documentation for *PeopleTools: Portal Technology*, “Using Pagelet Wizard to Create and Manage Pagelets.”

### Step 1: Entering Pagelet Identifying Information

Access the Pagelet Wizard - Specify Pagelet Information page (click the Go to Pagelet Wizard link on the List Properties - Publish Pagelet Wizard Definition page; or Portal Administration, Pagelets, Pagelet Wizard, Pagelet Wizard).

Use the Pagelet Wizard - Specify Pagelet Information page to identify and categorize a pagelet.

See the product documentation for *PeopleTools: Portal Technology*, “Using Pagelet Wizard to Create and Manage Pagelets,” Step 1: Entering Pagelet Identifying Information.

### Step 2: Selecting a Pagelet Data Source

Use the Pagelet Wizard - Select Data Source page (PTPPB_WIZ_DATASRC) to select the type of data source for the pagelet.

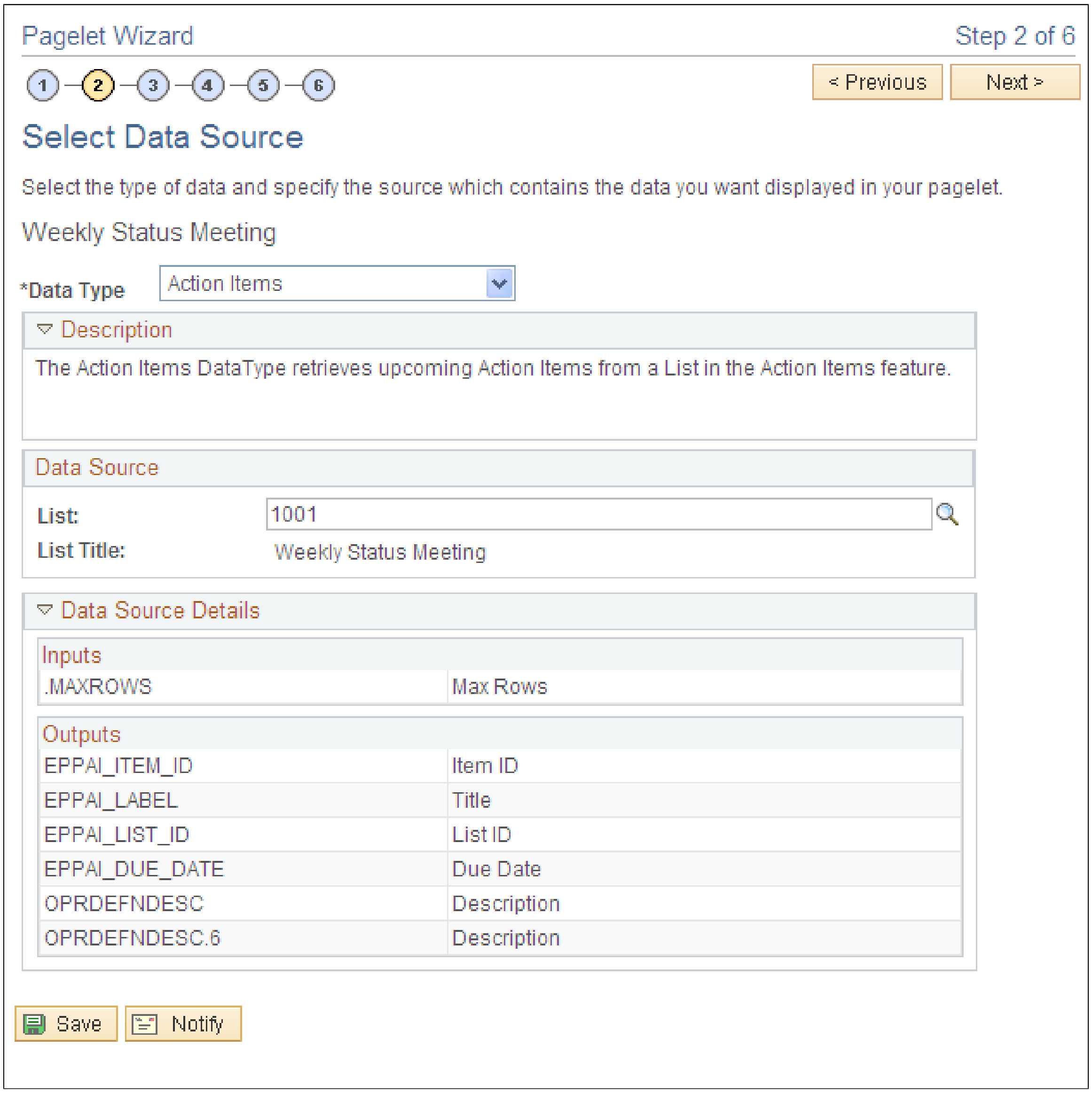
 

**Navigation**

- Click the Next button on the Pagelet Wizard - Specify Pagelet Information page.
- Click the Data Type button from any page in the wizard.

**Image: Pagelet Wizard - Select Data Source page (action items data type)**

The following example illustrates the Pagelet Wizard - Select Data Source page (action items data type).




Use the Pagelet Wizard - Select Data Source page to select the Pagelet Wizard data source type.

| | |
|---|---|
| **Data Type** | For action item lists, select *Action Items*. |
| **List** | Select the action item list to display in the pagelet. |
| **Inputs** | Displays the data source parameters that are used to retrieve data for the pagelet. |

**Outputs** Displays the data source parameter fields that are displayed as output in the pagelet.

## Step 3: Specifying Data Source Parameters

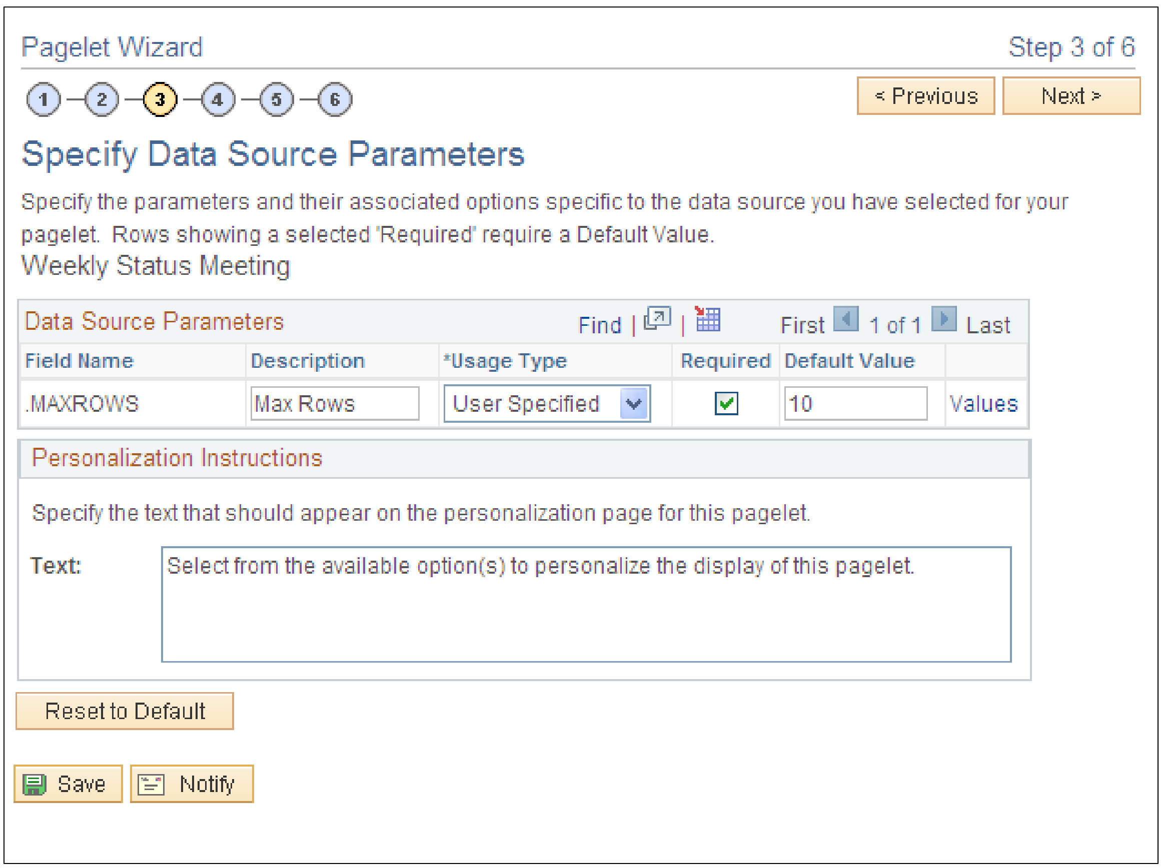
Use the Pagelet Wizard - Specify Data Source Parameters page (PTPPB_WIZ_DATAPRMS) to configure the data source parameters that are required for data to be displayed in the pagelet.

**Navigation**

- Click the Next button on the Pagelet Wizard - Select Data Source page.
- Click the Data Source Parameters button from any page in the wizard.

**Image: Pagelet Wizard - Specify Data Source Parameters page (action items data source)**

The following example illustrates the Pagelet Wizard - Specify Data Source Parameters page (action items data source).




Use the Pagelet Wizard - Specify Data Source Parameters page to configure the data source parameters that are required for data to be displayed in the pagelet.

---

**Note:** This page is accessible only when you are building a pagelet with a data source that allows modification of associated parameters.

---

**Field Name** Displays the name of the data source parameter.

| | |
|---|---|
| | For action item lists, the following data source parameters can be defined:<br><br>MAXROWS — Limits the number of entries displayed in the pagelet |
| **Description** | Displays a description of the data source parameter. |
| **Usage Type** | Select the type of accessibility that you want to grant for the data source parameter when it appears in the pagelet. Options are:<br><br>• *Admin Specified:* Select to enable those users with administrative privileges to specify variables for this field, as well as access the Configure link on the published pagelet and select from those parameters for users.<br><br>• *Context Sensitive:* Select to enable Context Manager to specify a data source parameter value for this field.<br><br>• *Fixed:* Select to enter a fixed value for the data source parameter that the end user cannot modify.<br><br>• *System Variable:* Select to assign a system variable as the data source parameter value. The value of the system variable is automatically inserted into the parameter when the pagelet appears. When you select this option, the pagelet end user cannot modify the data source parameter.<br><br>For example, suppose that you specify *%UserId* as the system variable for a parameter name User. When the pagelet appears on a user's homepage, the User field is populated by the *%UserId* system variable, which is the user ID used to access the pagelet.<br><br>• *User Specified:* Select to enable end users to specify a data source parameter value for this field. When a pagelet contains a user-specified parameter, the Customize button appears on the pagelet title bar.<br><br>End users can click this button to access a personalization page, on which they can select a data source parameter value that they want to use for the pagelet. Uers can select a value from a prompt, or they can manually enter their own value if no prompt values are available.<br><br>If you change the usage type from or to *User Specified* for a data source parameter on a published homepage pagelet, you must unpublish and then republish the pagelet. |
| **Required** | This check box is selected and disabled for parameters specified as administrator-specified, context-sensitive, fixed, and system variable; otherwise, it is selected but enabled for user-specified parameters. |

**Default Value**

You can enter a value that includes the % and * wildcards at the beginning or end of a value in the Default Value field.

Note the following about default values:

- If you select *User Specified* as the usage type and the data source parameter is a required value, you must enter the default value that should appear before a user enters a value. If the data source parameter is not a required value, you do not have to enter a default value.

  If you select a default value when defining prompt values on the Pagelet Wizard - Specify Data Source Parameter Values page, that default value populates this field.

  If you select *User Specified* as the usage type, you can also enter a system variable as the default value. For example, to make the current date the default value for a user-specified parameter, enter a default value of *%Date.*

- If you select *System Variable* as the usage type, you must enter a system variable to use as the data source parameter value. You can use the Look up Value button to access a list of valid system variables.

  See the product documentation for *PeopleTools: Portal Technology*, "Using Pagelet Wizard to Create and Manage Pagelets," Step 3: Specifying Pagelet Data Source Parameters, Understanding System Variables Supported as Data Source Parameters.

- If you select *Fixed* as the usage type, you must enter the fixed value.

**Values**

If you select *User Specified* or *Admin Specified* as the usage type, click Values to access the Pagelet Wizard - Specify Data Source Parameter Values page.

**Text**

Use the Personalization Instructions group box to enter custom personalization instructions for the pagelet. These personalization instructions appear on the personalization page of the pagelet.

**Note:** Personalization instructions must be translatable.

## Specifying Prompt Values for Data Source Parameters

Use the Pagelet Wizard - Specify Data Source Parameter Values page (PTPPB_WIZ_PRMVALS) to specify prompt values for the end user to select from when personalizing the pagelet.

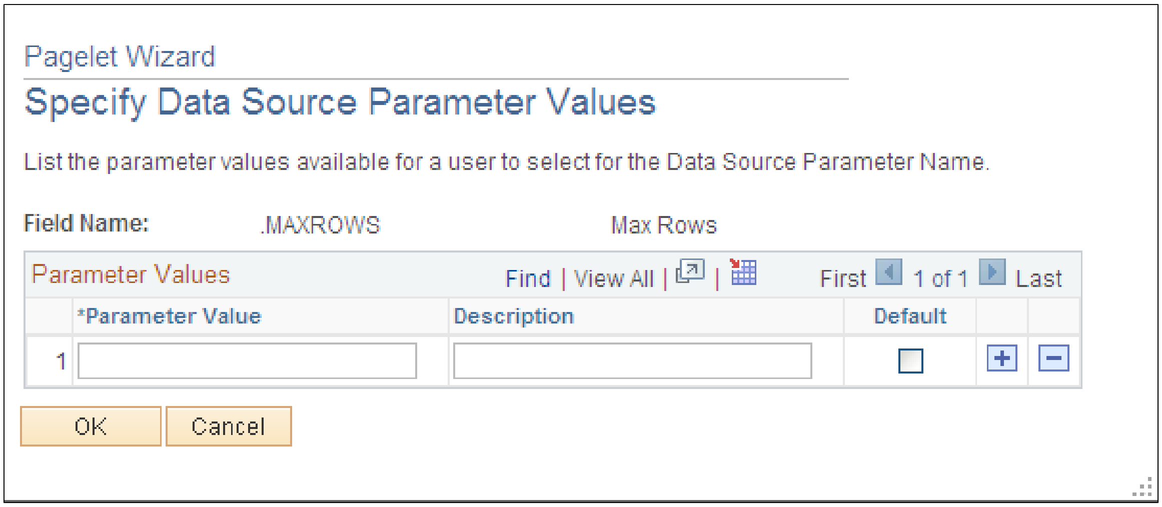
 

**Navigation**

Click the Values link on the Pagelet Wizard - Specify Data Source Parameters page.

**Image: Pagelet Wizard - Specify Data Source Parameter Values page (action items data source)**

The following example illustrates the Pagelet Wizard - Specify Data Source Parameter Values page (action items data source).




Use the Pagelet Wizard - Specify Data Source Parameter Values page to specify the prompt values, which are displayed to users when they personalize the pagelet. In addition, specify the default value for the parameter.

| | |
|---|---|
| **Parameter Value** | Specify the parameter value. |
| **Description** | Provide an optional description of the parameter value. |
| **Default** | Select one value as the default value. If the parameter is required, then a default value is required; otherwise, it is optional. |

## Step 4: Selecting a Pagelet Display Format

Use the Pagelet Wizard - Select Display Format page (PTPPB_WIZ_DISPFRMT) to specify the data transformation method and display format for the pagelet.

- Click the Next button on the Pagelet Wizard - Specify Data Source Parameters page.
- Click the Display Format button from any page in the wizard.

Use the Pagelet Wizard - Select Display Format page to specify the data transformation method and display format for the pagelet.

See the product documentation for *PeopleTools: Portal Technology*, "Using Pagelet Wizard to Create and Manage Pagelets ," Step 4: Selecting a Pagelet Display Format.

### Step 5: Specifying Pagelet Display Options

**Navigation**

- Select *Custom* as the display format and click the Next button on the Pagelet Wizard - Select Display Format page.
- Click the Transformation button from any page in the wizard.

Use the Pagelet Wizard - Specify Display Options page (PTPPB_WIZ_DISP_CUS) to enter the custom formatting details for the pagelet as well as header and footer options.

Preview the pagelet.

**Navigation**

- Select *Custom* as the display format and click the Next button on the Pagelet Wizard - Select Display Format page.
- Click the Transformation button from any page in the wizard.

Use the Pagelet Wizard - Specify Display Options page to enter the custom formatting details for the pagelet as well as header and footer options, and to preview the pagelet.

---

**Note:** If you are modifying an existing pagelet definition or if you modify data source parameter definitions, you might need to reselect the XSL template, regenerate the XSL, or both to have the modified pagelet display actual data.

---

See the product documentation for *PeopleTools: Portal Technology*, “Using Pagelet Wizard to Create and Manage Pagelets,” Step 5: Specifying Pagelet Display Options.

### Step 6: Specifying Pagelet Publication Options

Use the Pagelet Wizard - Specify Publishing Options page (PTPPB_WIZ_PUBOPT) to specify the manner in which the pagelet is published.

Provide registration, caching, and security details, and register the pagelet.

**Navigation**

- Click the Next button on the Pagelet Wizard - Specify Display Options page.
- Click the Register Pagelet icon from any page in the wizard.

Use the Pagelet Wizard - Specify Publishing Options page to specify the type of pagelet that you want to publish. In addition, provide registration, caching, and security details, and register the pagelet.

See the product documentation for *PeopleTools: Portal Technology*, “Using Pagelet Wizard to Create and Manage Pagelets,” Step 6: Specifying Pagelet Publication Options.

## List Properties - Publish as Pagelet Page

Use the List Properties - Publish as Pagelet page (EPPPB_PGLT_LST) to administer pagelet definitions for an action item list.

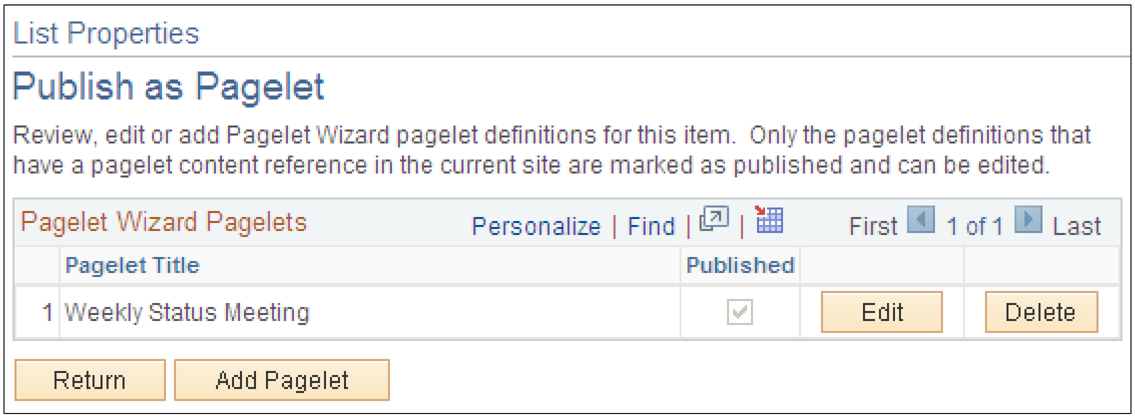
 

**Navigation**

- Click the Publish button on the List Properties - Publish Pagelet Wizard Definition page.
- If this action item list has already been published as a pagelet, click the Publish as Pagelet link on the List Properties page.

**Image: List Properties - Publish as Pagelet page**

The following example illustrates the List Properties - Publish as Pagelet page.




Use the List Properties - Publish as Pagelet page to review, edit, or add Pagelet Wizard pagelet definitions for this action item list. To edit a pagelet definition, it must be marked as published and have a content reference in the current site.

---

**Note:** Pagelets for this action item list published directly from Pagelet Wizard also appear in this list.

---

| | |
|---|---|
| **Edit** | Displays the List Properties - Publish Pagelet Wizard Definition page on which you can make changes to the pagelet definition. |
| **Delete** | Deletes this pagelet definition and the published pagelet content references in all sites. |
| **Add Pagelet** | Adds a new pagelet definition based on the current action item list. |

## Publish to Multiple Portals Page

Access the Publish to Multiple Portals Page (click the Publish Pagelet in Other Sites link on the List Properties - Publish Pagelet Wizard Definition page; or Portal Administration, Pagelets, Publish Pagelets).

Two pages are available for you to publish pagelets to multiple portals:

- Use the Publish to Multiple Portals page to publish the pagelet definition to additional portals and sites.
- Use the Publish Multiple Pagelets page to publish multiple pagelet definitions to another portal or site.

See the product documentation for *PeopleTools: Portal Technology*, “Working With Navigation Pages,” Publishing Pagelets.

Chapter 7

# Working With Blogs

## Understanding Blogs

Blogs in Oracle's PeopleSoft Interaction Hub enable individual authors or teams to maintain blogs (or "web logs"). In PeopleSoft Interaction Hub, blogs provide these features:

- Rich text editing and image support.
- Multi-threaded comments that can be moderated or unmoderated.
- Tagging.
- Feeds.
- Ability to search blog content.
- Multi-language support.
- Public or PeopleSoft role-based security.

A blog is a site, maintained by an individual or group, with regular posts of commentary, descriptions of events, or other material. Individuals post articles on their blogs to let a community of interested parties read about and comment on items and ideas expressed.

Many blogs provide commentary or news on a particular subject, and this is most common in an enterprise blog. A typical blog combines text, images, and links to other blogs, web pages, and other media related to its topic. The ability for readers to leave comments in an interactive format is an important part of the blog.

Corporate or enterprise blogs can be used either internally, to enhance communication and culture in a corporation, or externally, for marketing or public relations. External blogs can also be used to disseminate information to customers and user groups, suppliers, partners, and so on.

In PeopleSoft Interaction Hub, blogs can be created as "standalone" in portals and sites, or as an integrated module of a collaborative workspace. Standalone blogs can be accessed through the My Blogs page and the Blogs homepage pagelet.

When portal system administrators create a standalone blog, they can then assign an administrator to manage each blog. The blog administrator determines the membership and privileges for the blog, and has the option to manage the blog as moderated or unmoderated. Blog moderation is applied to all comments or replies. If moderation is set, the administrator has to approve each comment or reply before it can be viewed by the blog participants. The approval or rejection of a post causes an email notification to be sent to the participant who posted to the blog.

---

**Note:** Comments and replies posted by an author to his or her own post are not moderated.

---

This section also provides an overview of:

- Blog privileges.
- Blogs module in collaborative workspaces.

## Understanding Blog Privileges

The following table summarizes blog privileges granted by portal role or privilege set ID. Privilege set IDs are defined on the Define Privilege Sets page. Privileges are assigned to blog participants on the Blog Security page.

| ***Role ID or Privilege Set ID*** | ***Description*** | ***Privileges*** |
|---|---|---|
| PAPP_SYSTEM_ADMIN | Interaction Hub System Admin role. | A portal administrator can:<br>• Create new blogs.<br>• Assign administrators to manage blogs.<br>• Manage blogs.<br>• Delete blogs.<br>• Approve or reject blog comments or replies (when moderation of the blog is enabled).<br>In addition, as a participant of blog a portal administrator can:<br>• View blog posts and replies.<br>• Add posts to blogs.<br>• Add replies to blogs. |
| EPPBL_ADMINISTRATOR | Administrator privilege set. | • Manage the blog.<br>• Approve or reject blog comments or replies (when moderation of the blog is enabled).<br>• Add posts.<br>• Edit any post or reply.<br>• Delete any post or reply.<br>• Edit own posts or replies.<br>• Delete own posts or replies.<br>• View blog posts and replies. |

| Role ID or Privilege Set ID | Description | Privileges |
|---|---|---|
| EPPBL_AUTHOR | Author privilege set. | • Add posts.<br>• Edit own posts or replies.<br>• Delete own posts or replies (if no replies have been posted to that post or reply).<br>• View blog posts and replies. |
| EPPBL_READER | Reader privilege set. | View blog posts and replies. |

## Understanding the Blogs Module in Collaborative Workspaces

The Blogs module provides a platform that workspace members can use to discuss posts of interest. The blog can be configured as moderated or unmoderated, and members can post blog posts and replies. The pages used to participate in blogs in the Blogs module are the same pages used for standalone blogs.

See "Using the Blogs Module" (PeopleSoft Interaction Hub 9.1: Collaborative Workspaces).

# Creating Blogs

This topic discusses steps to create a blog and add blog members.

**Note:** Portal system administrators can create standalone blogs and then assign an administrator to manage each blog.

## Pages Used to Create Blogs

| Page Name | Definition Name | Usage |
|---|---|---|
| Create Blog Page | EPPBL_BLOG_NEW | Set the properties for a new blog. |
| Blog Security Page | EPPBL_BLOG_MEM | Maintain blog members. |
| Set Members Privileges Page | EPPBL_BLOG_PRIV | Assign blog participants by user or role. Assign privileges to the participants. |
| About Page | EPPBL_BLOG_POLICY | Create a policy statement for the blog. |

## Create Blog Page

Use the Create Blog page (EPPBL_BLOG_NEW) to set the properties for a new blog.

### Navigation

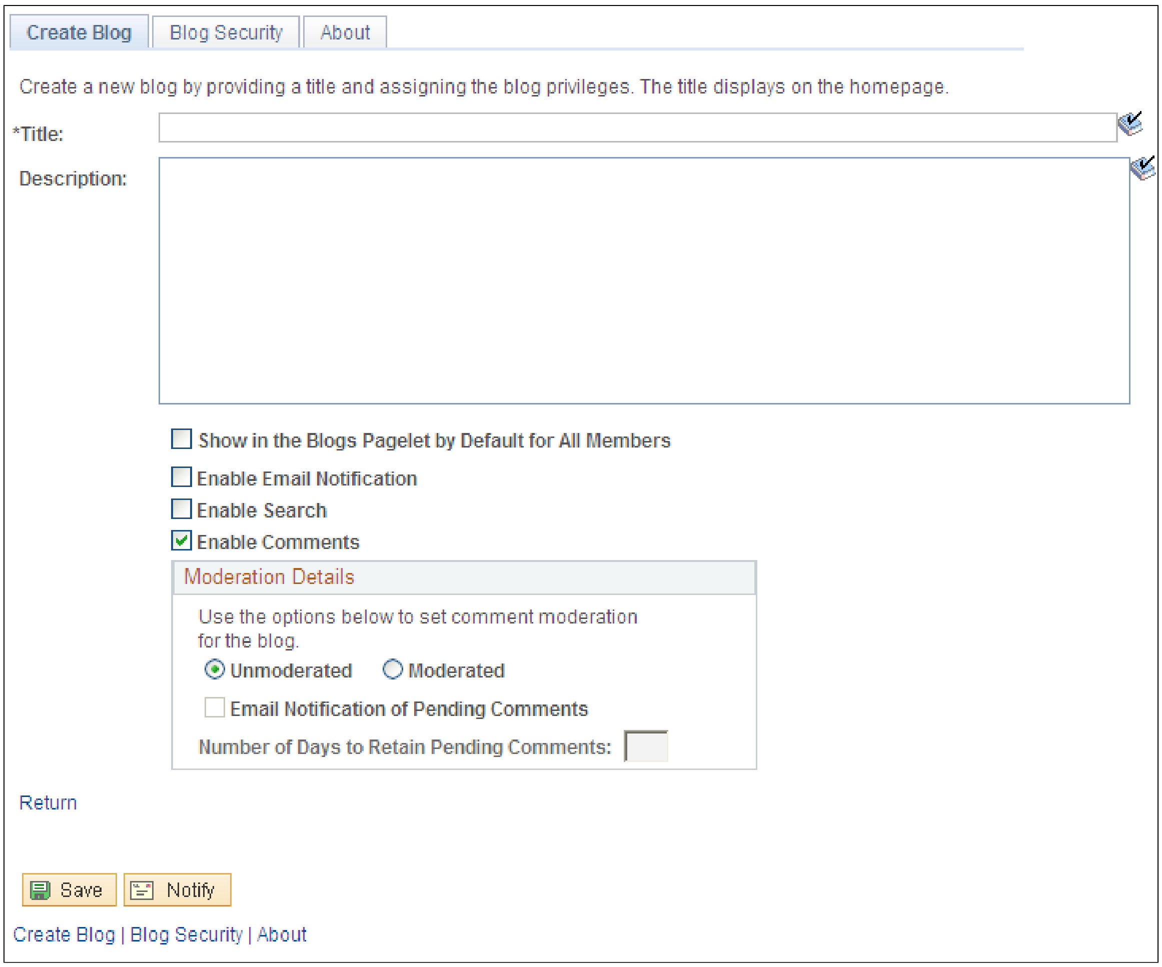
- My Content, My Blogs

  Click the Create Blog button.

- Click the Create Blog link on the Blogs pagelet.

### Image: Create Blog page

The following example illustrates the Create Blog page.




Use the Create Blog page to set the properties for a new blog.

| | |
|---|---|
| **Title** | Enter a title for the blog. This text appears on the Blogs pagelet as the link to access the blog. |
| **Description** | Enter a description of the goal of the blog. This text appears on the Blogs pagelet as hover text for the link used to access the blog. |
| **Show in the Blogs Pagelet by Default for All Members** | Select to display this blog in the Blogs pagelet by default for all users who are included in the users and roles assigned on the Blog Security page. |

| | |
|---|---|
| **Enable Email Notification** | Select to allow members to send email notifications. |
| **Enable Search** | Select to allow members to search within the blog. |
| **Enable Comments** | **Note:** Blog moderation applies to comments and replies. Comments and replies posted by an author to his or her own post are not moderated.<br><br>Select the moderation option for this blog:<br><br>• *Unmoderated* — Comments and replies to this blog are not moderated.<br><br>• *Moderated* — All comments and replies to this blog are moderated.<br><br>The blog administrator must review and approve or reject each comment and reply to this blog. |
| **Email Notification For Pending Comments** | Select this option to send an email notification to the blog administrator for each comment or reply that requires approval. |
| **Number of Days to Retain Pending Comments** | Set the number of days to retain a pending comment or reply.<br><br>After the set number of days has passed, a pending comment or reply is rejected. Set this field to *0* to retain pending comments and replies indefinitely. |

## Blog Security Page

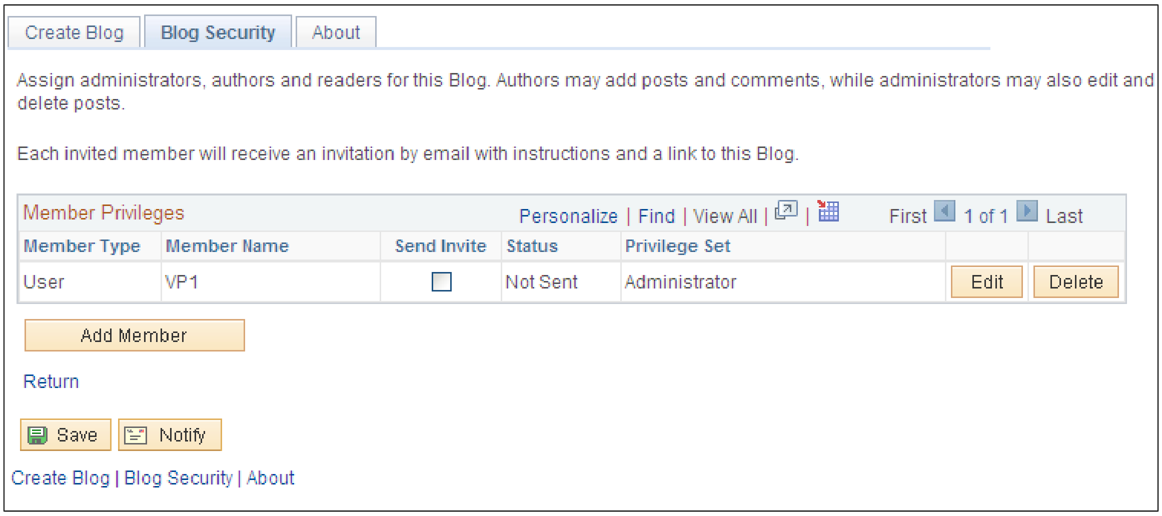
Use the Blog Security page (EPPBL_BLOG_MEM) to maintain blog members.

### Navigation

Select the Blog Security page from the Create Blog page.

### Image: Blog Security page

The following example illustrates the Blog Security page.




**Edit** Click the Edit button to access the Set Members Privileges page to modify the privileges for this member.

**Delete** Click the Delete button to delete this member.

**Add Member** Click the Add Member button to access the Set Members Privileges page to add a new member to the blog.

## Set Members Privileges Page

Use the Set Members Privileges page (EPPBL_BLOG_PRIV) to assign blog participants by user or role.

Assign privileges to the participants.

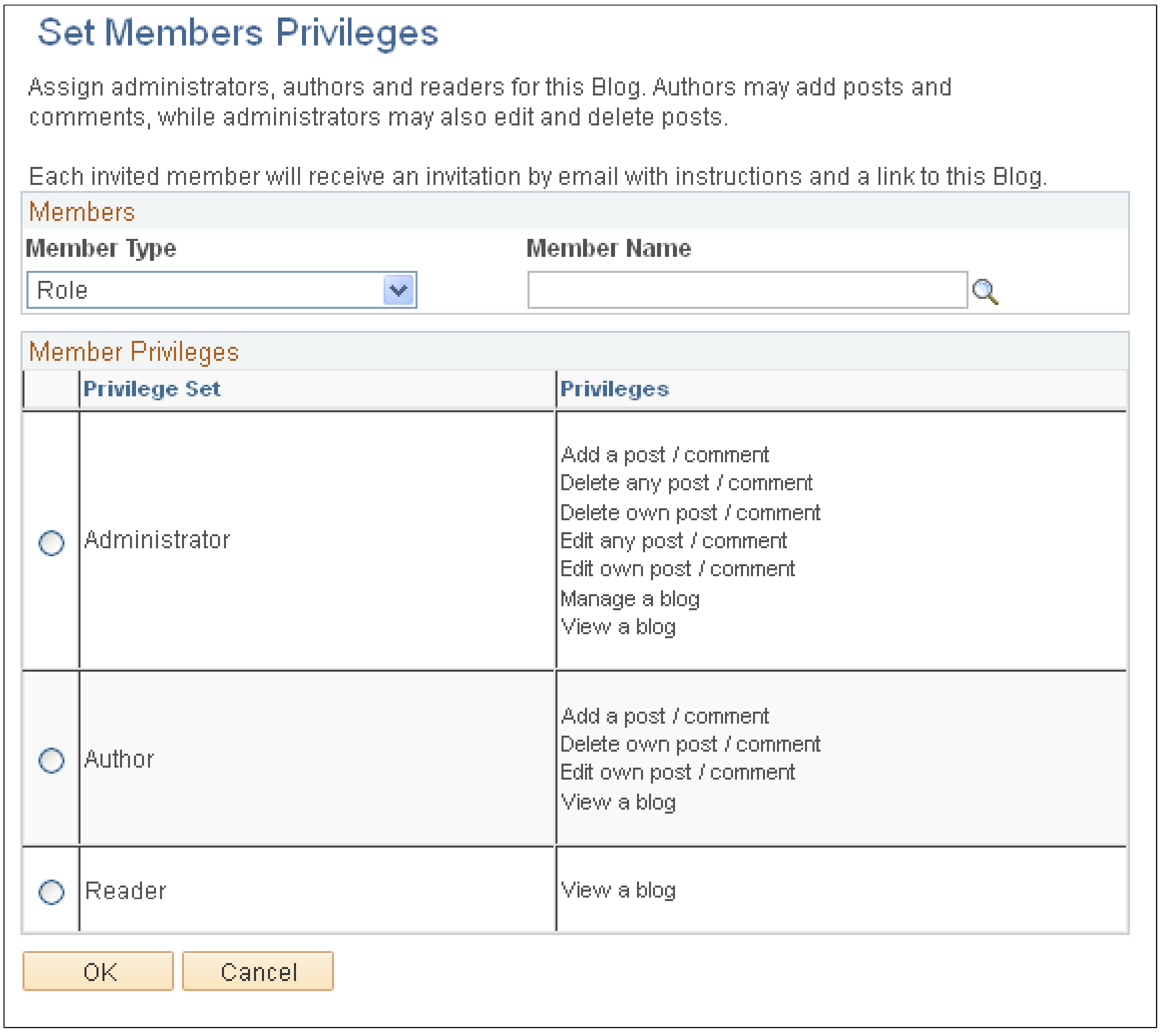
 

**Navigation**

- Click the Add Member button on the Blog Security page.
- Click the Edit button on the Blog Security page.

**Image: Set Members Privileges page**

The following example illustrates the Set Members Privileges page. .




**Member Type**

Select the type of participant you want to add to the blog:

1. *Role* — Select to add blog participants by role.

   See the product documentation for *PeopleTools: Security Administration*, "Setting Up Roles."

2. *User* — Select to add blog participants by user ID.

   See the product documentation for *PeopleTools: Security Administration*, "Administering User Profiles."

**Member Name**

Select the role or user ID.

**Privilege Set**

Select the privilege level you want to assign to the member:

*Administrator*

*Author*

*Reader*

---

**Note:** At a minimum, every blog requires an administrator.

---

See Understanding Blog Privileges.

## About Page

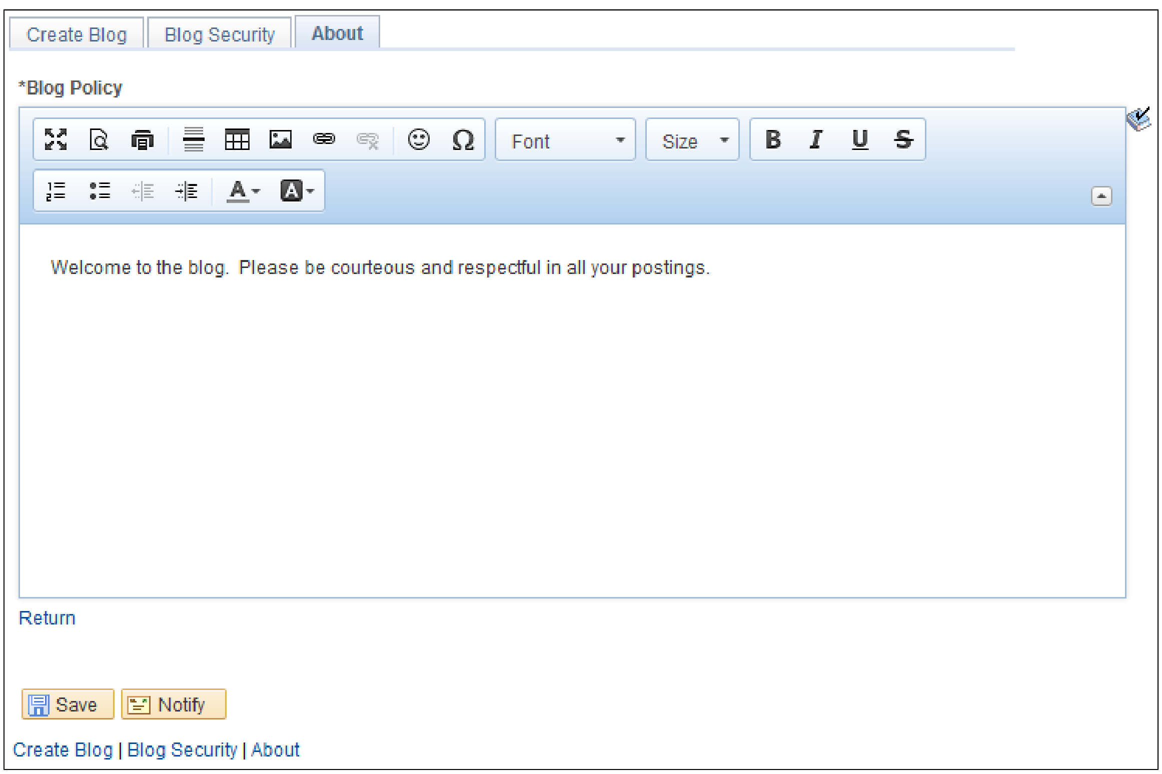
Use the About page (EPPBL_BLOG_POLICY) to create a policy statement for the blog.

**Navigation**

Select the Blog Security page from the Create Blog page.

**Image: About page**

The following example illustrates the About page.




Use the rich text editor to enter any policies that apply to the blog.

# Participating in Blogs

This section discusses participating in blogs to add or edit a blog post, view post details, blog feeds and comments, use tags and delete a post.

## Pages Used to Participate in Blogs

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| My Blogs Page | EPPDF_MYFORUMS | Provides access to all of the blogs of which you are a participant.<br><br>See Using My Blogs Page and <Blog Title> Homepage for more information on My Blogs page. |
| <Blog Title> Homepage | EPPBL_VIEW_POSTS | Serves as the homepage for a blog listing all blog posts and providing features to participate in the blog.<br><br>See Using My Blogs Page and <Blog Title> Homepage. |
| Create New Post Page | EPPDF_REPLY_TOPIC | Add a post to a blog.<br><br>See Creating New Post Page for more information on adding a new post to the blog. |
| Post a comment Page | EPPDF_REPLY_TOPIC | Add a comment to a blog post.<br><br>The fields on this page are the same as those on the Create New Post page.<br><br>See Creating New Post Page for more information on posting a comment. |
| Edit a Post Page | EPPDF_REPLY_TOPIC | Edit a blog post (post, comment, or reply).<br><br>The fields on this page are the same as those on the Create New Post page.<br><br>See Creating New Post Page for more information on editing a post. |
| Add a Reply Page | EPPDF_REPLY_TOPIC | Add a reply to a blog comment.<br><br>The fields on this page are the same as those on the Create New Post page.<br><br>See Creating New Post Page for more information on replying to a blog comment. |

| *Page Name* | *Definition Name* | *Usage* |
|---|---|---|
| View Pending Comments Page | EPPBL_MY_PEND_SEC | Review comments and replies that you submitted that have not been accepted yet by the blog administrator.<br><br>See Viewing Pending Comments Page for more information on pending comments. |
| View Rejected Comments Page | EPPBL_MY_PEND_SEC | Review comments and replies that you submitted that have been rejected by the blog administrator.<br><br>See Viewing Pending Comments Page for more information on rejected comments. |
| Blog Post Details Page | EPPBL_VIEW_COMMENT | View the details of a blog post. |

## Using My Blogs Page and <Blog Title> Homepage

Use the My Blogs page (EPPDF_MYFORUMS) to provides access to all of the blogs of which you are a participant.

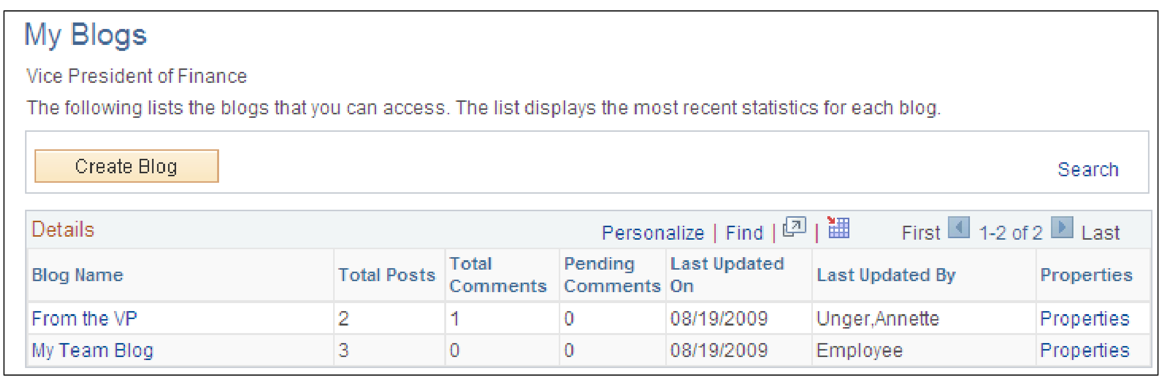
**Navigation**

- My Content, My Blogs
- Click the My Blogs link on the Blogs pagelet.

1. Select My Content, My Blogs to access the My Blogs Page

   **Image: My Blogs page**

   The following example illustrates the My Blogs page.

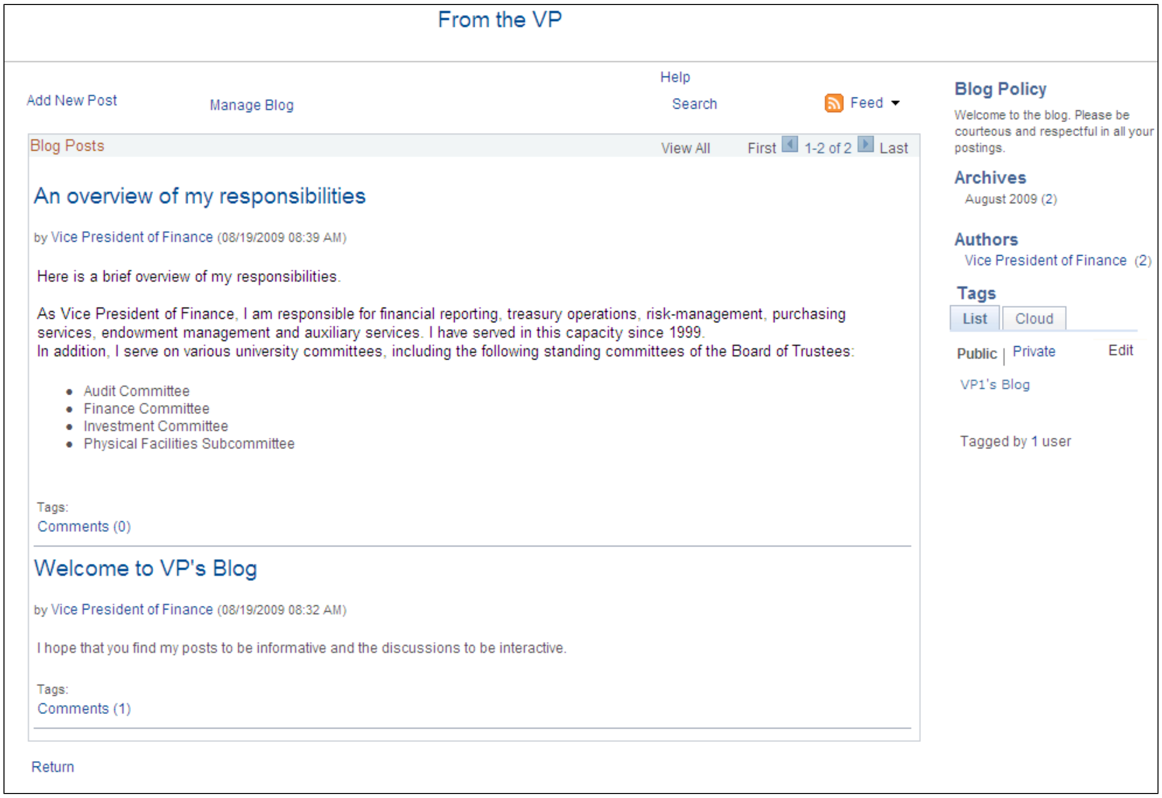
   
   

   Use the My Blogs page to access to all of the blogs of which you are a participant. The My Blogs page provides an overview of the activity in each of these blogs.

2. Click the link for a blog on the My Blogs page to access the homepage for a blog.

**Image: <Blog Title> homepage (administrator view)**

The following example illustrates the <Blog Title> homepage (administrator view).




Use the blog homepage to participate in the blog.

**Note:** Certain functions are available on this page only if you have been granted author or administrator privilege for this blog.

| | |
|---|---|
| **<Blog Title>** | Click the blog title at the top of the page to return to the blog homepage displaying *all posts.* |
| **Add New Post** | Click to access the Create New Post page.<br><br>**Note:** This link appears only for authors or administrators of the blog. |
| **Manage Blog** | Click to access the Manage Blog page.<br><br>**Note:** This link appears only if you are an administrator of the blog. |
| **Search** | Click to access the Search Blogs page to search in the current blog or other blogs. |
|  | Hover over any of these to view the list of feeds published for this blog. 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.<br><br>Click the Open menu button to toggle the list of feeds between frozen open and closed.<br><br>See Viewing and Subscribing to Feeds. |
| **<Post Title>** | Click a post title link to view the post details page. |
| **Comments (#)** | Click a Comments(#) link to view the post details page. |
| **Blog Policy** | Displays the blog policy as defined by the blog administrator. |
| **Archives** | Click the number to the right of a month in the Archives section to display posts for that month only. |
| **Authors** | • Click the author's name to display that user's system profile in a new browser window.<br><br>• Click the number to the right of an author's name to display posts for that author only. |
| **Tags** | Use the List tab to manage tags at the blog level; use the Cloud tab to view a tag cloud encompassing the blog and all posts. |

## Creating New Post Page

Access the Create New Post page (click the Add New Post link on the blog homepage).

Access the Post a comment page (click the Comment link on the post details page).

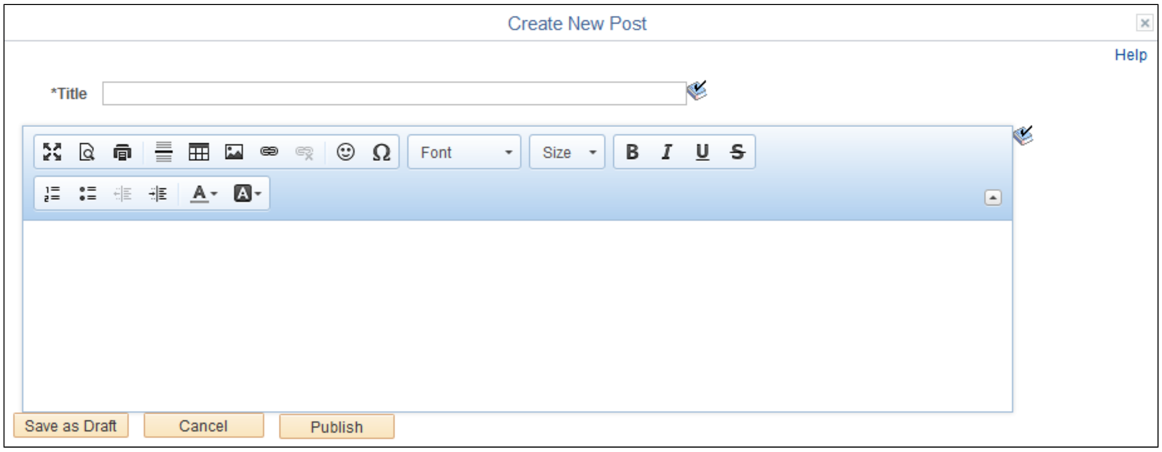
Access the Edit a Post page (click the Edit link on the post details page).

Access the Add a Reply page (click the Reply link on the post details page).

**Image: Create New Post page**

The following example illustrates the Create New Post page.




Use the Create New Post page to add a new post to a blog.

Use the Post a comment page to add a comment to a blog post.

Use the Edit a Post page to edit a blog post (post, comment, or reply).

Use the Add a Reply page to add a reply to a blog comment.

**Title**

Enter a title for your blog post.

**<edit field>**

Use the editor to enter the text of the post.

**Save as Draft**

Click to save your post in a draft state. The post, or modifications, are not visible until you publish it.

**Note:** The Save as Draft button appears on the Create New Post page and the Edit a Post page. If you edit an existing post and save it as a draft, the post (even the original content) is no longer visible in the blog until the draft is published.

**Save**

Click to save your comment or reply so that it can be viewed in the blog or reviewed by the blog administrator.

**Note:** The Save button appears on the Post a comment page and the Add a Reply page.

**Cancel**

Click to cancel any changes without saving or publishing and return to the post details page.

**Publish**

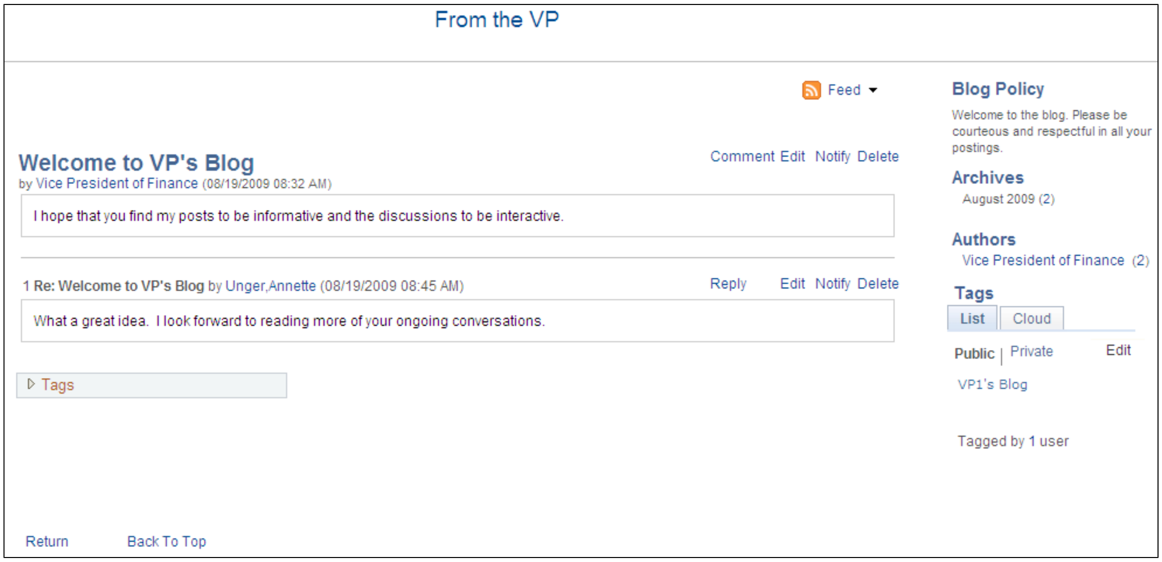
Click to publish your post so that it can be viewed in the blog.

**Note:** The Save as Draft button appears on the Create New Post page and the Edit a Post page.

## Post Details Page

**Image: Post details page (author view)**

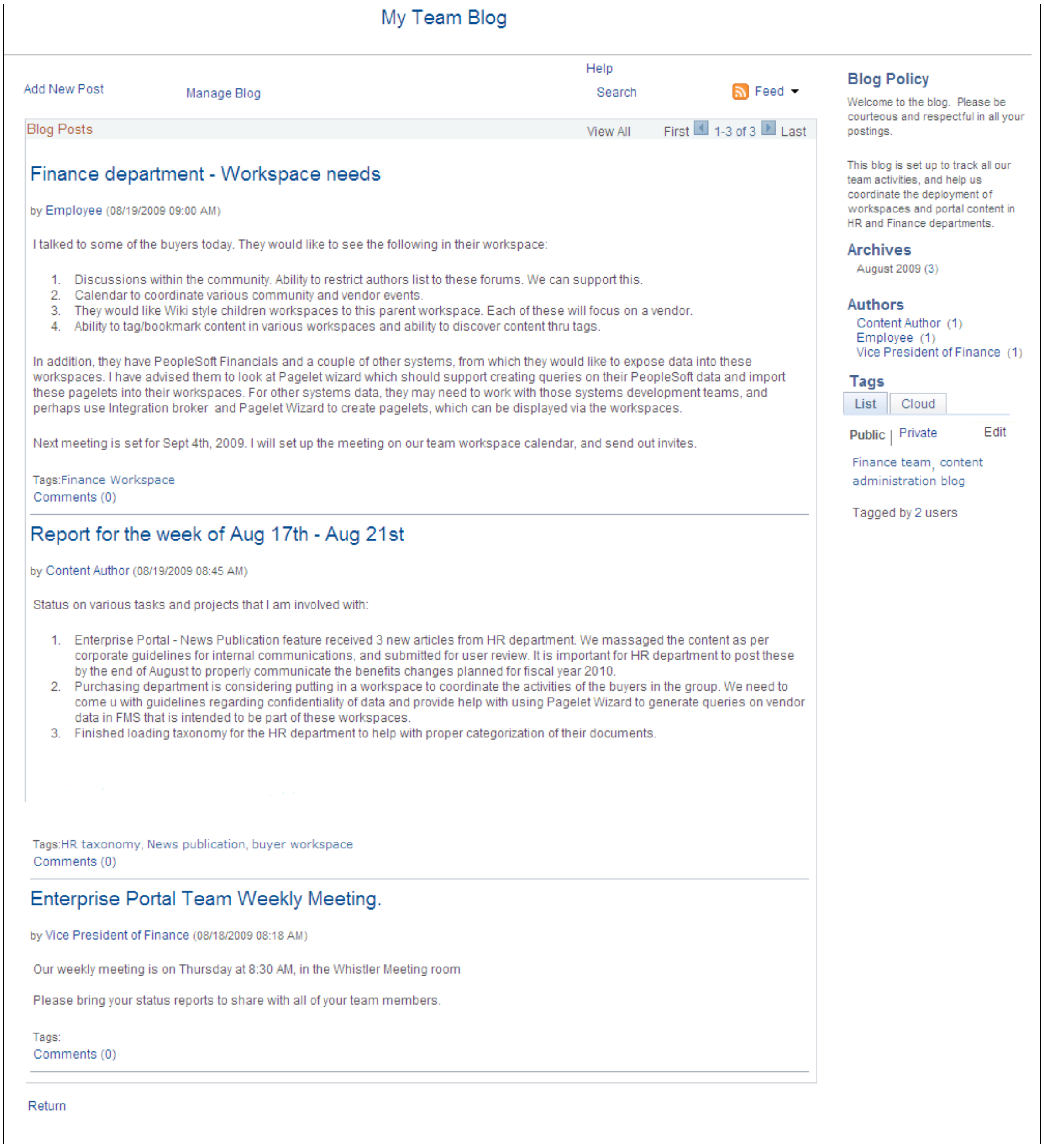
The following example illustrates the Post Details page (author view). Access the Post Details Page (click the link for a post on the blog homepage) a shown below.



### Image: Post details page (reader view)

The following example illustrates the Post details page (reader view).




Use the post details page to view the details for a blog post.

| | |
|---|---|
| **<Blog Title>** | Click the blog title at the top of the page to return to the blog homepage. |
| **View Pending Comments** | Click to access the View Pending Comments page to view which of your new blog comments and replies are pending acceptance by the blog administrator. |

| | |
|---|---|
| **View Rejected Comments** | Click to access the View Rejected Comments page to view which of your new blog comments and replies were rejected by the blog administrator. |
| | Hover over any of these to view the list of feeds published for this blog. Click any list item to open that feed document.<br><br>Click the Feed button or Feed link to open the first feed document in the list.<br><br>Click the Open menu button to toggle the list of feeds between frozen open and closed.<br><br>See Viewing and Subscribing to Feeds. |
| **Reply** | Click to access the Add a Reply page to reply to a comment or reply. |
| **Comment** | Click to access the Post a comment page to comment on this post. |
| **Edit** | Click to access the Edit a Post page to edit this post. |
| **Notify** | Click to access the Notify Members page to send a notification to blog participants. |
| **Delete** | Click to delete this post. Any comments and replies to this post will also be deleted. |
| **<Author>** | Click to view the system profile for the author of the post, comment, or reply in a separate browser window. |
| **or Tags** | Click to view the expandable Tags section for the blog post. |

## Viewing Pending Comments Page

Use the View Pending Comments page (EPPBL_MY_PEND_SEC) to review comments and replies that you submitted that have not been accepted yet by the blog administrator.

**Navigation**

Click the View Pending Comments link on the post details page.

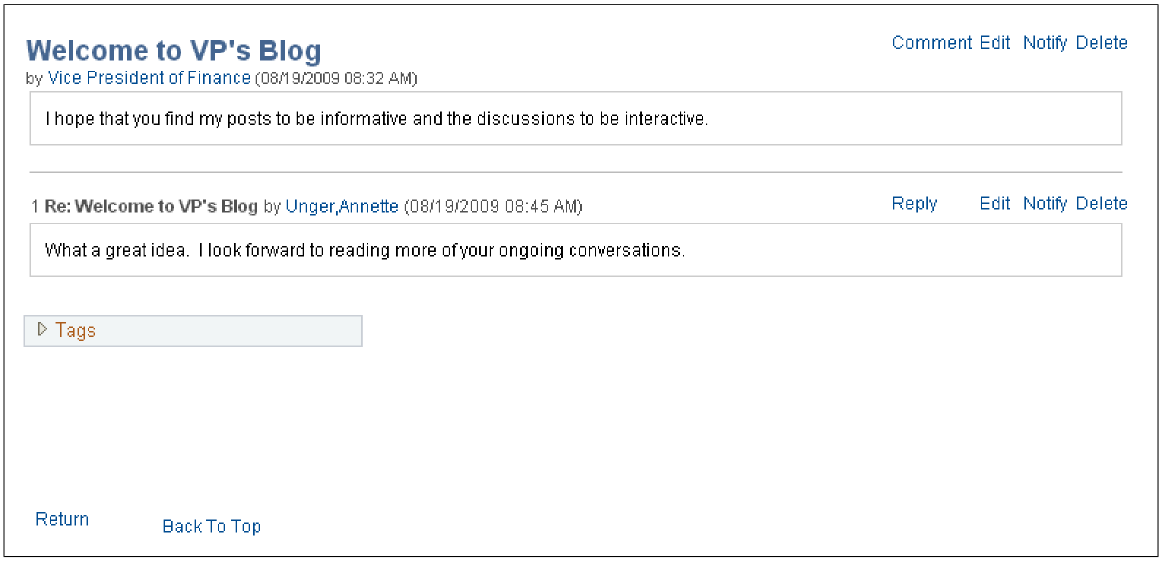
Access the View Pending Comments page (click the View Pending Comments link on the blog homepage).

Access the View Rejected Comments page (click the View Rejected Comments link on the blog homepage).

**Image: View Pending Comments page**

The following example illustrates the View Pending Comments page.




Use these pages to view your pending or rejected comments and replies for this blog. The links and buttons are the same for each page. In the preceding example, the View Pending Comments page is shown.

| | |
|---|---|
| **Find** | Click to pop up a dialog box allowing you to search the page contents for a specific comment or reply. |
| **Return** | Click to return to the previous page. |

## Deleting a Post

To delete a post from a blog:

1. Go to the post details page for the post that you want to delete.

   **Note:** You are able to delete a post if you are the author of the post or the blog administrator.

2. Click the Delete button.
3. Click OK to confirm that you want to delete that post and any associated comments and replies.

## Viewing Blog Feeds

Once a blog is published as a feed, the link to the blog's feed is available on the blog homepage, the post details page, the Blogs pagelet, and in other pages and pagelets in the PeopleSoft Interaction Hub system.

See Viewing and Subscribing to Feeds.

## Blog Post Details Page

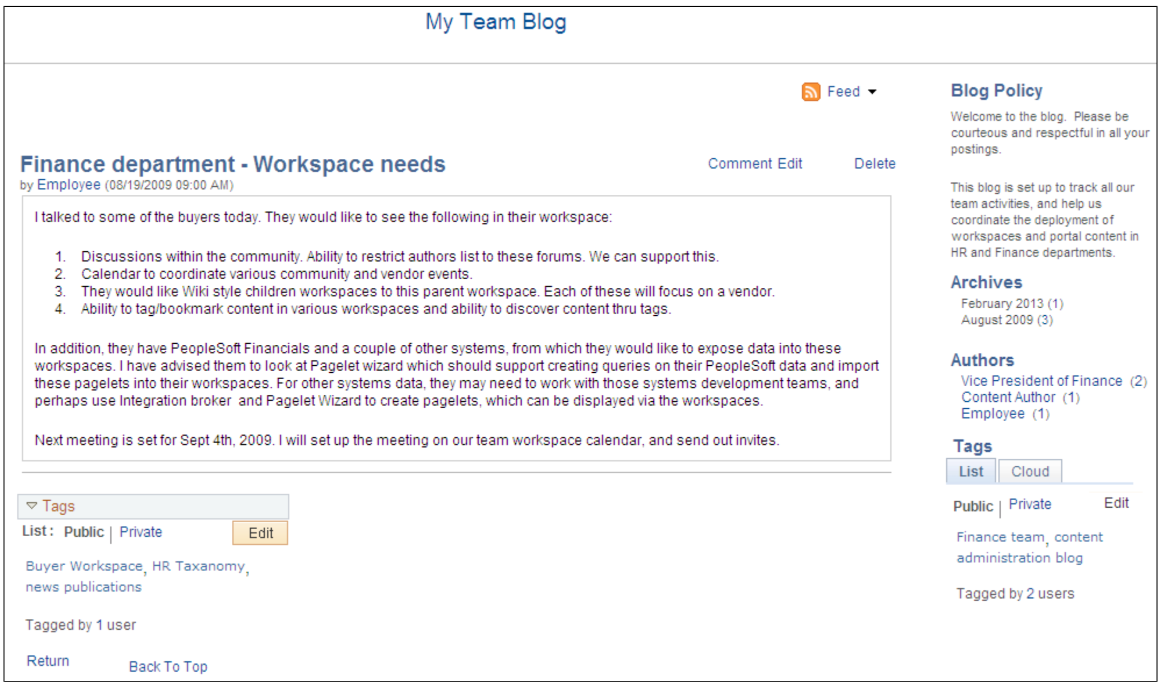
In a blog, tags can be added and managed in the Tags section at two levels:

- At the blog level on the blog homepage.
- At the post level on the post details page.

In addition, the Tags section on the blog homepage includes a tag cloud showing all tags (blog level and post level) added to this blog.

**Image: A blog post details page showing tags**

The following example illustrates the blog post details page showing Tags section from a blog homepage:




In this example, *buyer workspace, HR taxonomy* and *news publications* are tags at the post level as shown in the expandable Tags section. The Tags Cloud tab shows all tags in use throughout this blog.

Creating, managing, and using tags is discussed in this PeopleBook.

See "Understanding the Tagging Framework" (PeopleSoft Interaction Hub 9.1: Portal and Site Administration).

# Managing Blogs

This topic discusses procedures to approve or reject pending comments, publish a blog as feed and administer a blog.

## Pages Used to Manage Blogs

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| Manage Blog Page | EPPBL_BLOG_MANAGE | Set the properties for a blog.<br><br>See Manage Blog Page for more information to manage a blog page. |
| Blog Security Page | EPPBL_BLOG_MEM | Maintain blog members.<br><br>See Manage Blog Page for more information on blog security. |
| Set Members Privileges Page | EPPBL_BLOG_PRIV | Assign blog participants by user or role. Assign privileges to the participants.<br><br>See Manage Blog Page for more information to set privileges to blog members. |
| Set Invitation Message Page | EPPBL_ADMIN_INVITE | Set the invitation message and send invitations to blog members.<br><br>See Manage Blog Page for more information on Set Invitation Message page. |
| About Page | EPPBL_BLOG_POLICY | Enter a policy statement for the blog.<br><br>See Manage Blog Page for more information on blog policy statement. |
| Pending Messages Page | EPPDF_PENDING_POST | Approve or reject pending comments and replies to the blog.<br><br>See Approving or Rejecting Pending Comments for more information on Pending Messages page. |
| View a Post Page | EPPDF_POST_SEC | Review the comment or reply text prior to approving or rejecting it.<br><br>See Approving or Rejecting Pending Comments for more information on View a Post page. |
| Reject Expired Pending Forum Posts/ Blog Comments Page | EPPDF_PSTRJT_RUN | Run the EPPDF_PSTRJT Application Engine program to reject pending comments and replies that have expired.<br><br>See Approving or Rejecting Pending Comments. |
| Administer Blogs Page | EPPDF_MYFORUMS | Delete blogs. Also, access the Manage Blog page for each blog.<br><br>See Administer Blogs Page. |

| Page Name | Definition Name | Usage |
|---|---|---|
| Administer Blogs - Delete Confirmation Page | EO_PE_YESNOCONFIRM | Confirm deletion of the blog.<br><br>See Administer Blogs Page. |

## Manage Blog Page

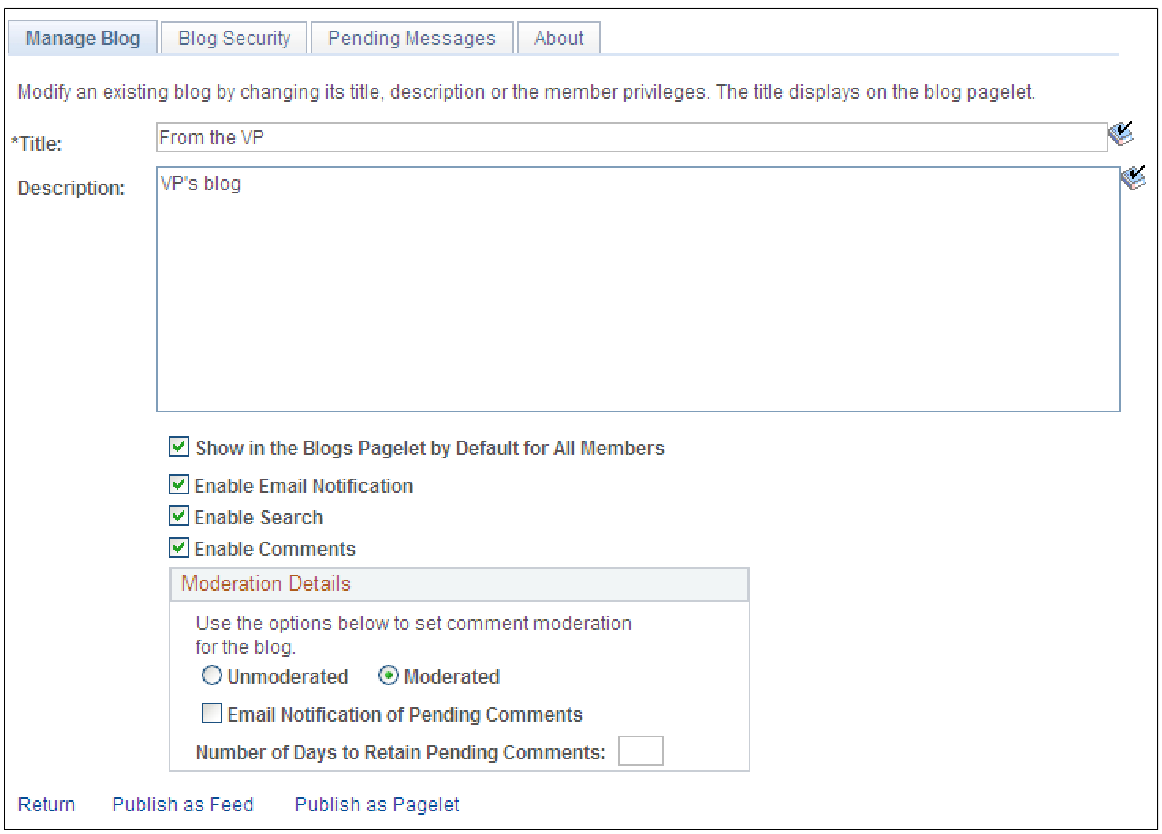
Use the Manage Blog page (EPPBL_BLOG_MANAGE) to set the properties for a blog.

### Navigation

- Click the Manage Blog button on the blog homepage.
- Click the link for a blog on the Administer Blogs page.

### Image: Manage Blog page

This example illustrates the fields and controls on the Manage Blog page. You can find definitions for the fields and controls later on this page.




Use the Manage Blog page to set the properties for a blog.

| | |
|---|---|
| **Title** | Enter a title for the blog. This text appears on the Blogs pagelet as the link to access the blog. |

| | |
|---|---|
| **Description** | Enter a description of the goal of the blog. This text appears on the Blogs pagelet as hover text for the link used to access the blog. |
| **Show in the Blogs Pagelet by Default for All Members** | Select to display this blog in the Blogs pagelet by default for all users who are included in the users and roles assigned on the Blog Security page. |
| **Enable Email Notification** | Select to allow members to send email notifications. |
| **Enable Search** | Select to allow members to search within the blog. |
| **Enable Comments** | **Note:** Blog moderation applies to comments and replies. Comments and replies posted by an author to his or her own post are not moderated.<br><br>Select the moderation option for this blog:<br><br>• *Unmoderated* — Comments and replies to this blog are not moderated.<br><br>• *Moderated* — All comments and replies to this blog are moderated.<br><br>The blog administrator must review and approve or reject each comment and reply to this blog. |
| **Email Notification For Pending Comments** | Select this option to send an email notification to the blog administrator for each comment or reply that requires approval. |
| **Number of Days to Retain Pending Comments** | Set the number of days to retain a pending comment or reply.<br><br>After the set number of days has passed, a pending comment or reply is rejected. Set this field to *0* to retain pending comments and replies indefinitely. |
| **Publish as Feed** | Click to access the Manage Blog - Publish Feed Definition page to publish this blog as a feed. |
| **Publish as Pagelet** | Click to access the Manage Blog Publish Pagelet Wizard Definition page to publish this blog as a pagelet. |
| **Return** | Click to return to the previous page. |

This section also discusses how to:

- Manage blog participants and privileges.
- Send invitations to the blog.
- Manage the blog policy statement.

## Managing Blog Participants and Privileges

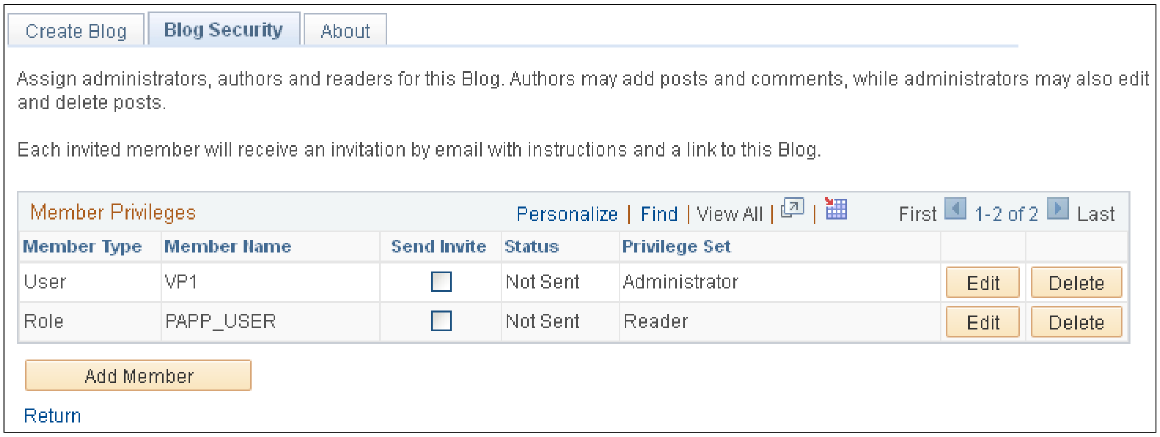
Use the Blog Security page (EPPBL_BLOG_MEM) to maintain blog members.

**Navigation**

Select the Blog Security page from the Create Blog page.

**Image: Blog Security page**

The following example illustrates the Blog Security page. Use the Blog Security page to assign blog participants and privileges.



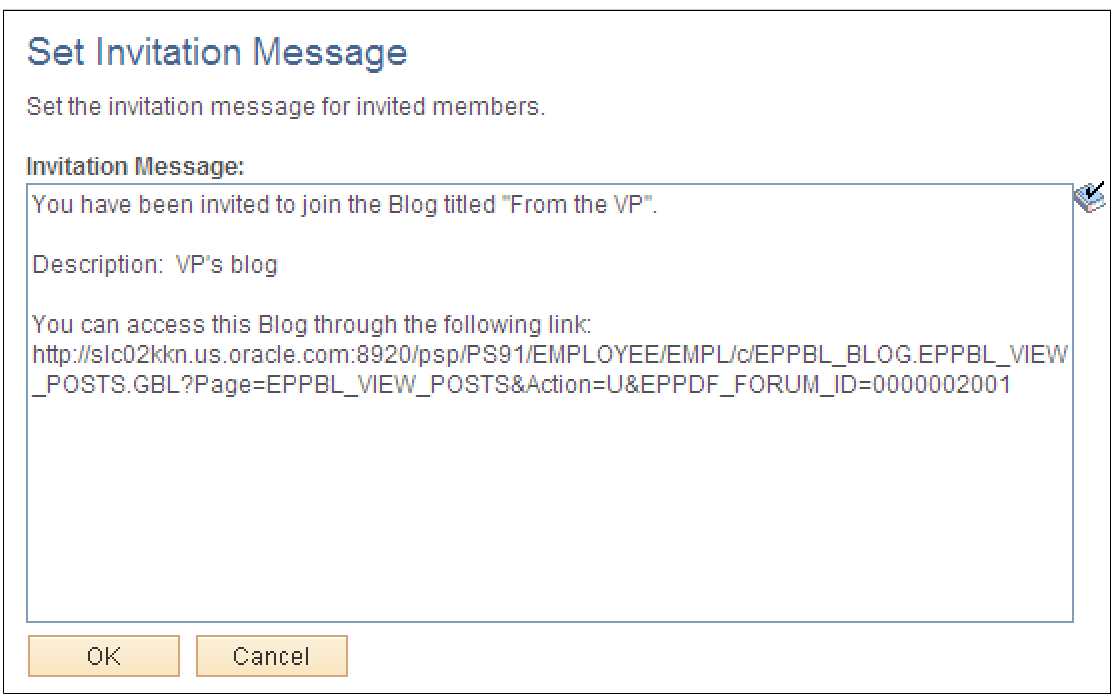

See Blog Security Page.

## Sending Invitations to the Blog

Access the Set Invitation Message page (click the Send Invitations button on the Blog Security page) as shown below.

**Image: Set Invitation Message page**

The following example illustrates the Set Invitation Message page.



### Managing the Blog Policy Statement

Access the About page (select About on the Manage Blog page). Use the About page to edit the blog policy statement.

See About Page.

## Approving or Rejecting Pending Comments

This section discusses how to:

- Approve or reject comments and replies manually.
- Review a comment or reply.
- Reject expired comments and replies automatically.

---

**Note:** The approval or rejection of a comment or reply causes an email notification to be sent to the participant who posted to the blog.

---

### Pending Messages Page

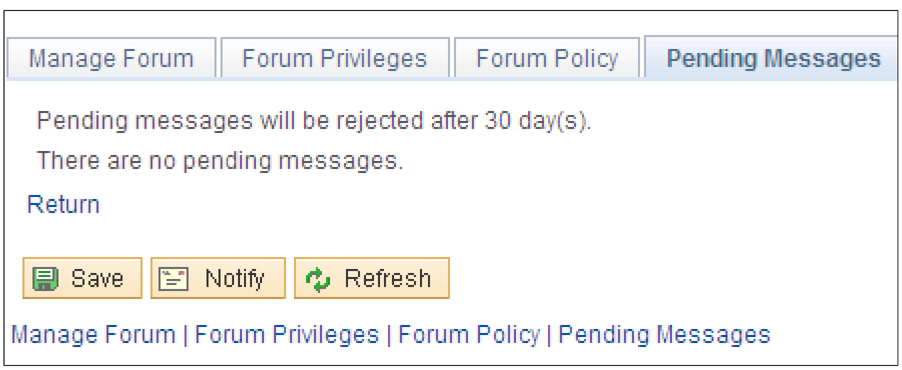
Use the View a Post page (EPPDF_POST_SEC) to Review the comment or reply text prior to approving or rejecting it.

**Navigation**

Click the title for a comment or reply on the Pending Messages page.

**Image: Pending Messages page**

This example illustrates the fields and controls on the Pending Messages page. You can find definitions for the fields and controls later on this page.




Use the Pending Messages page to approve or reject comments and replies to the blog.

| | |
|---|---|
| **Select** | Select one or more comments or replies to update in bulk. |
| **Title** | Click a comment title to access the View a Post page to review the posted text. |
| **Post Status and Change Selected To** | Select one of the following statuses:<br>• *Approved* |

- *Pending*
- *Rejected*

**Select All** Click to select all listed comments and replies.

**Clear All** Click to clear the selection of all listed comments and replies.

**Return** Click to return to the previous page.

## Reviewing a Comment or Reply

Access the View a Post page (click the link for a post on the Pending Messages page).

**Image: View a Post page**

This example illustrates the fields and controls on the View a Post page.


Use the View a Post page to review the comment or reply text prior to approving or rejecting it. Click Return to return to the Pending Messages page.

## Rejecting Expired Comments and Replies Automatically

Access the Reject Expired Pending Forum Posts/Blog Comments page (select Portal Administration, Blogs, Reject Expired Posts/Comments).

Run the EPPDF_PSTRJT Application Engine program to reject pending comments and replies that have expired. This program searches for all pending comments and replies and checks the authored date for each. If the difference between the current date and the authored date is equal to or greater than the number of days set on the Manage Blog page for that blog, then the message status is set to rejected.

Set the process recurrence for the EPPDF_PSTRJT program to a frequency suitable for your system—for example, *M-F at 5pm.*

## Publishing a Blog as a Feed

Blogs can be published as feeds. Once published, the link to a blog's feed is available on the blog homepage, the post details page, the Blogs pagelet, and in other pages and pagelets in the PeopleSoft Interaction Hub system.

There are no special advanced options for blog feeds. Therefore, the standard feed publishing process can be followed.

See Publishing PeopleSoft Interaction Hub Content as a Feed.

## Administer Blogs Page

Use the Administer Blogs page (EPPDF_MYFORUMS) to delete blogs.

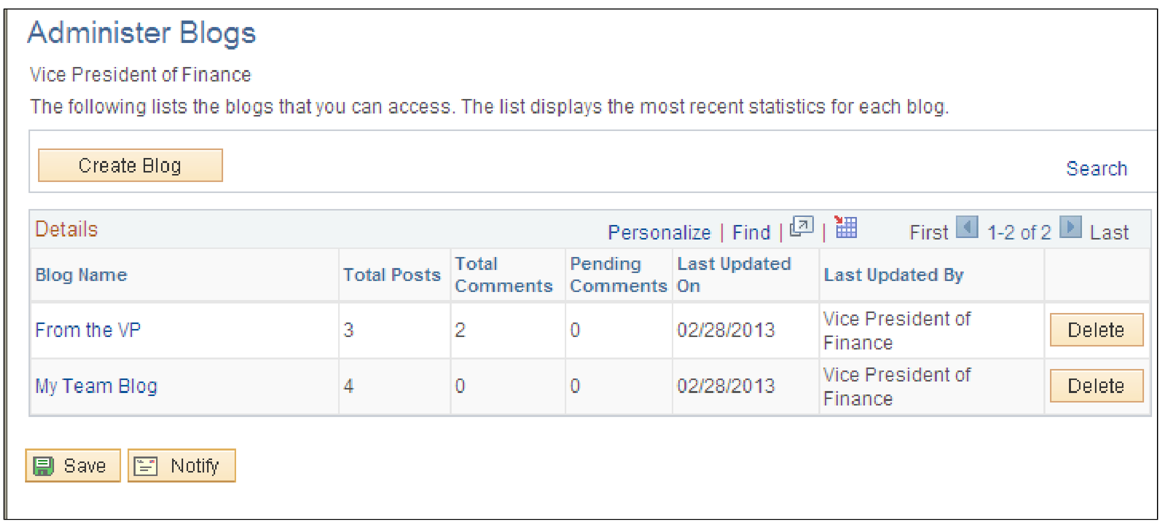
Also, access the Manage Blog page for each blog.

**Navigation**

Portal Administration, Blogs, Administer Blogs

**Image: Administer Blogs page**

This example illustrates the fields and controls on the Administer Blogs page. You can find definitions for the fields and controls later on this page.




Use the Administer Blogs page to delete blogs and to access the Manage Blog page for each blog.

| | |
|---|---|
| **Blog Name** | Click the title for a blog to access its Manage Blog page. |
| **Delete** | Click to delete the blog. |

# Publishing a Blog as a Pagelet

This topic discusses publishing a blog from pagelet Wizard and publishing a pagelet from a blog.

## Pages Used to Publish a Blog as a Pagelet

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| Manage Blog - Publish Pagelet Wizard Definition Page | EPPPB_PGLT_PUB | Create a pagelet definition for a blog. |
| Pagelet Wizard - Specify Pagelet Information Page | PTPPB_WIZ_INFO | Provide information to identify and categorize a pagelet.<br><br>Publishing a Blog from Pagelet Wizard |
| Pagelet Wizard - Select Data Source Page | PTPPB_WIZ_DATASRC | Select the type of data source for the pagelet.<br><br>Publishing a Blog from Pagelet Wizard |
| Pagelet Wizard - Specify Data Source Parameters Page | PTPPB_WIZ_DATAPRMS | Configure the data source parameters that are required for data to be displayed in the pagelet.<br><br>This page is accessible only when you are building a pagelet with a data source that allows modification of associated parameters.<br><br>Publishing a Blog from Pagelet Wizard |
| Pagelet Wizard - Specify Data Source Parameter Values Page | PTPPB_WIZ_PRMVALS | Specify prompt values for the end user to select from when personalizing the pagelet.<br><br>This page is accessible only for data source parameters for which you have selected the *User Specified* or *Admin Specified* usage types.<br><br>Publishing a Blog from Pagelet Wizard |
| Pagelet Wizard - Select Display Format Page | PTPPB_WIZ_DISPFRMT | Specify the data transformation method and display format for the pagelet.<br><br>Publishing a Blog from Pagelet Wizard |
| Pagelet Wizard - Specify Display Options Page | PTPPB_WIZ_DISP_CUS | Enter the custom formatting details for the pagelet as well as header and footer options. Preview the pagelet.<br><br>Publishing a Blog from Pagelet Wizard |
| Pagelet Wizard - Specify Publishing Options Page | PTPPB_WIZ_PUBOPT | Specify the manner in which the pagelet is published. Provide registration, caching, and security details, and register the pagelet.<br><br>Publishing a Blog from Pagelet Wizard |

| Page Name | Definition Name | Usage |
|---|---|---|
| Pagelet Wizard - Pagelet Creation Confirmed Page | PTPPB_WIZ_FINISH | Confirm that the creation of the pagelet is complete.<br><br>Publishing a Blog from Pagelet Wizard |
| Manage Blog - Publish as Pagelet Page | EPPPB_PGLT_LST | Administer pagelet definitions for a blog. |
| Publish to Multiple Portals Page | PTPP_PMPUBPRTL | Publish the pagelet definition to additional portals and sites. |

## Manage Blog - Publish Pagelet Wizard Definition Page

Use the Manage Blog - Publish Pagelet Wizard Definition page (EPPPB_PGLT_PUB) to create a pagelet definition for a blog.

**Navigation**

- My Content, My Blogs

  Click the link for the blog on the My Blogs page.

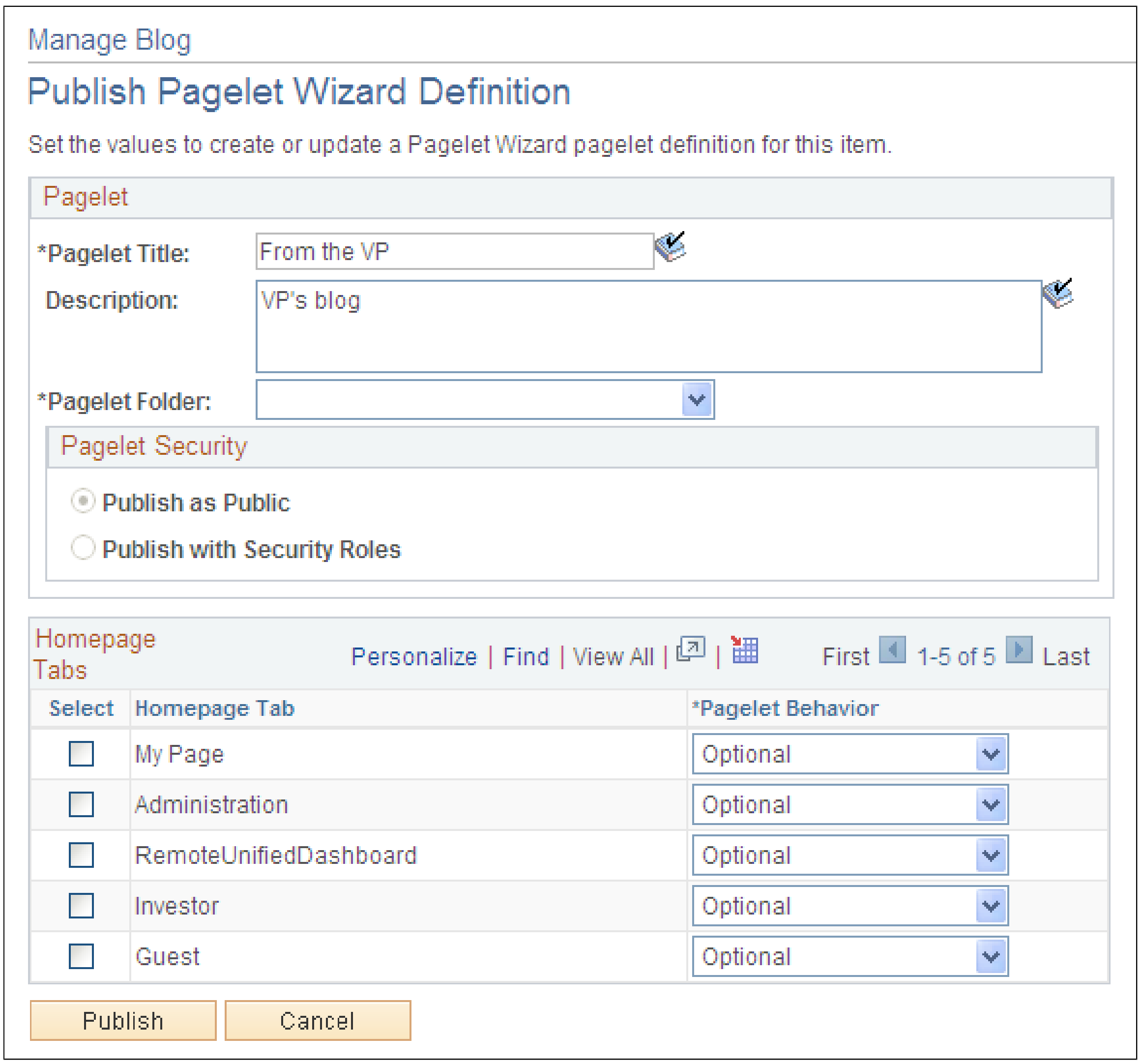
  Click the Manage Blog link on the blog homepage.

  Click the Publish as Pagelet link on the Manage Blog page.

- Click the Add Pagelet button or the Edit button on the Manage Blog - Publish as Pagelet page.

**Image: Manage Blog - Publish Pagelet Wizard Definition page**

The following example illustrates the Manage Blog - Publish Pagelet Wizard Definition page.




## Pagelet

The pagelet title and description from the Manage Blog page appear in the Pagelet group box. You can edit these two fields, if necessary.

| | |
|---|---|
| **Pagelet Title** | Displays the title for the blog, which can be edited as the title for the pagelet. |
| **Description** | Displays the description for the blog, which can be edited as the description for the pagelet. |
| **Pagelet Folder** | Select a folder to publish to. Only folders from the current site are available to select. |
| **Pagelet Security** | Select the security options for viewing the pagelet. Available options are:<br>*Publish as Public*, which enables all users to view the pagelet.<br>*Publish with Security Roles*, which uses the roles defined on the Blog Security page when publishing the pagelet.<br>**Note:** If there are no roles defined on the Blog Security page, the system automatically selects to publish the pagelet as public. |

### Homepage Tabs

Use this group box to define the homepage tab labels and behavior for the pagelet.

| | |
|---|---|
| **Homepage Tab** | Select the tabs that will display the pagelet. |
| **Pagelet Behavior** | Select the behavior options for the pagelet.<br>*Optional*. The pagelet will not automatically appear on the homepage. However, it is available for selection when users personalize their homepages. This setting should not be used for guest homepage pagelets because guest users do not have personalization privileges.<br>*Optional-Default*. The pagelet will appear on all user homepages if they have access to the pagelet. The pagelet can be removed when users personalize their homepages. This setting should not be used for guest homepage pagelets because guest users do not have personalization privileges.<br>*Required-Fixed*. The pagelet will appear on all user homepages if they have access to the pagelet. The placement of the pagelet cannot be changed and the pagelet cannot be removed from the homepage.<br>*Required*. The pagelet will appear on all user homepages if they have access to the pagelet. The placement of the pagelet can be changed, but it cannot be removed from the homepage. |
| **Publish** | Click the Publish button to publish this pagelet and display the Manage Blog - Publish as Pagelet page, on which you can review or edit the pagelet definition |

## Publishing a Blog from Pagelet Wizard

A pagelet for a blog can be created and published using Pagelet Wizard and then managed from the Manage Blog page. This section provides an overview of how to use Pagelet Wizard to complete the following six steps:

- Step 1: Entering Pagelet Identifying Information.
- Step 2: Selecting a Pagelet Data Source.
- Step 3: Specifying Data Source Parameters.

  Step 3 also includes "Specifying Prompt Values for Data Source Parameters."
- Step 4: Selecting a Pagelet Display Format.
- Step 5: Specifying Pagelet Display Options.
- Step 6: Specifying Pagelet Publication Options.

---

**Note:** If you access Pagelet Wizard from the Go to Pagelet Wizard link, you will be modifying an existing pagelet definition. If you want to create a new pagelet definition, start from the Portal Administration or PeopleTools navigation path.

---

Where appropriate, this section provides details specific to using Pagelet Wizard to publish a blog as a pagelet.

See the product documentation for *PeopleTools: Portal Technology*, "Using Pagelet Wizard to Create and Manage Pagelets."

### Step 1: Entering Pagelet Identifying Information

Use the Pagelet Wizard - Specify Pagelet Information page (PTPPB_WIZ_INFO) to provide information to identify and categorize a pagelet.

**Navigation**

- Click the Go to Pagelet Wizard link on the Manage Blog - Publish Pagelet Wizard Definition page.
- Portal Administration, Pagelets, Pagelet Wizard, Pagelet Wizard
- PeopleTools, Portal, Pagelet Wizard, Pagelet Wizard
- Click the Pagelet Information button from any page in the wizard.

Access the Pagelet Wizard - Specify Pagelet Information page (click the Go to Pagelet Wizard link on the Manage Blog - Publish Pagelet Wizard Definition page; or Portal Administration, Pagelets, Pagelet Wizard, Pagelet Wizard).

Use the Pagelet Wizard - Specify Pagelet Information page to identify and categorize a pagelet.

See the product documentation for *PeopleTools: Portal Technology*, "Using Pagelet Wizard to Create and Manage Pagelets," Step 1: Entering Pagelet Identifying Information.

## Step 2: Selecting a Pagelet Data Source

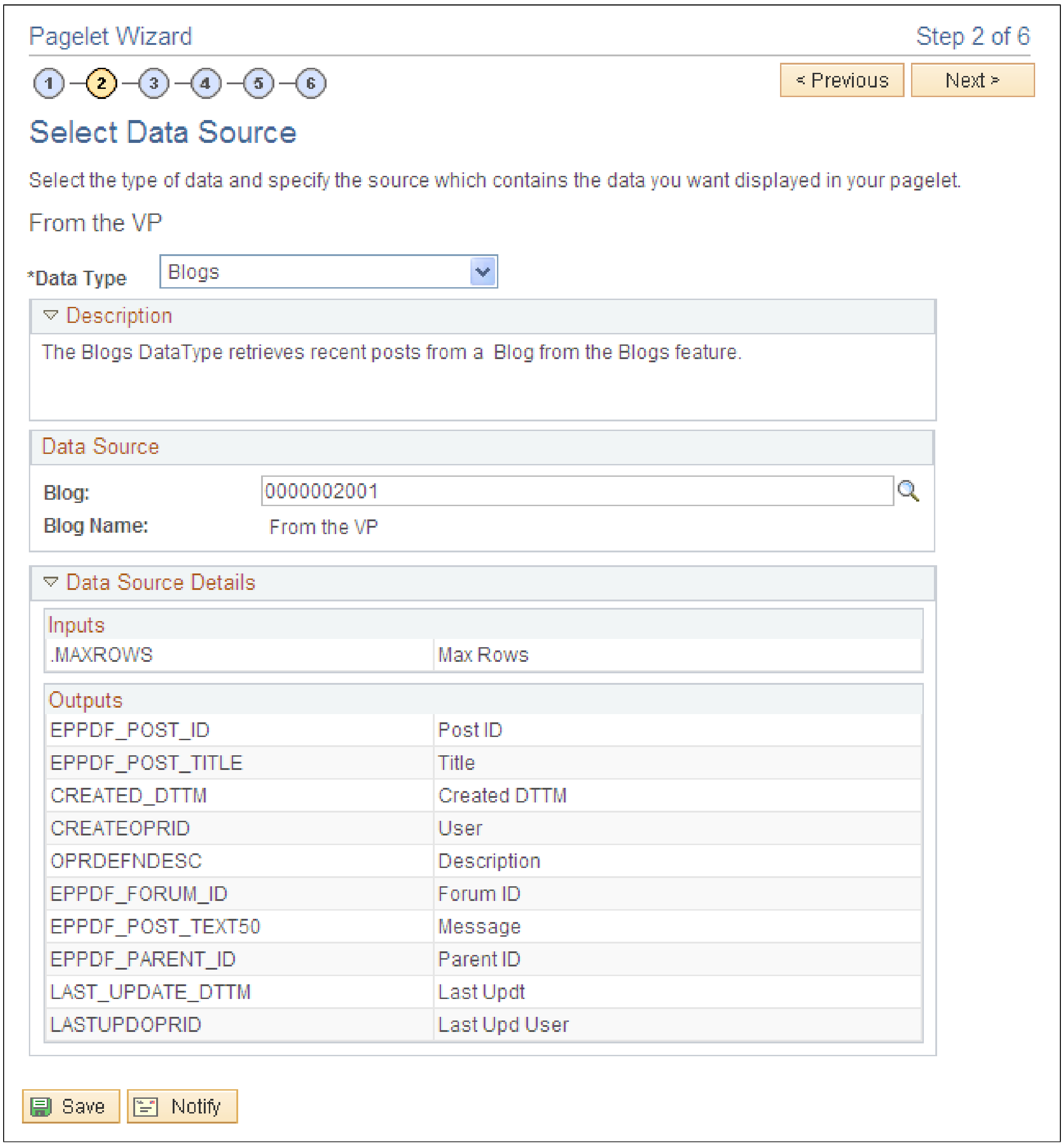
Use the Pagelet Wizard - Select Data Source page (PTPPB_WIZ_DATASRC) to select the type of data source for the pagelet.

**Navigation**

- Click the Next button on the Pagelet Wizard - Specify Pagelet Information page.
- Click the Data Type button from any page in the wizard.

**Image: Pagelet Wizard - Select Data Source page (blogs data type)**

The following example illustrates the Pagelet Wizard - Select Data Source page (blogs data type).




Use the Pagelet Wizard - Select Data Source page to select the Pagelet Wizard data source type.

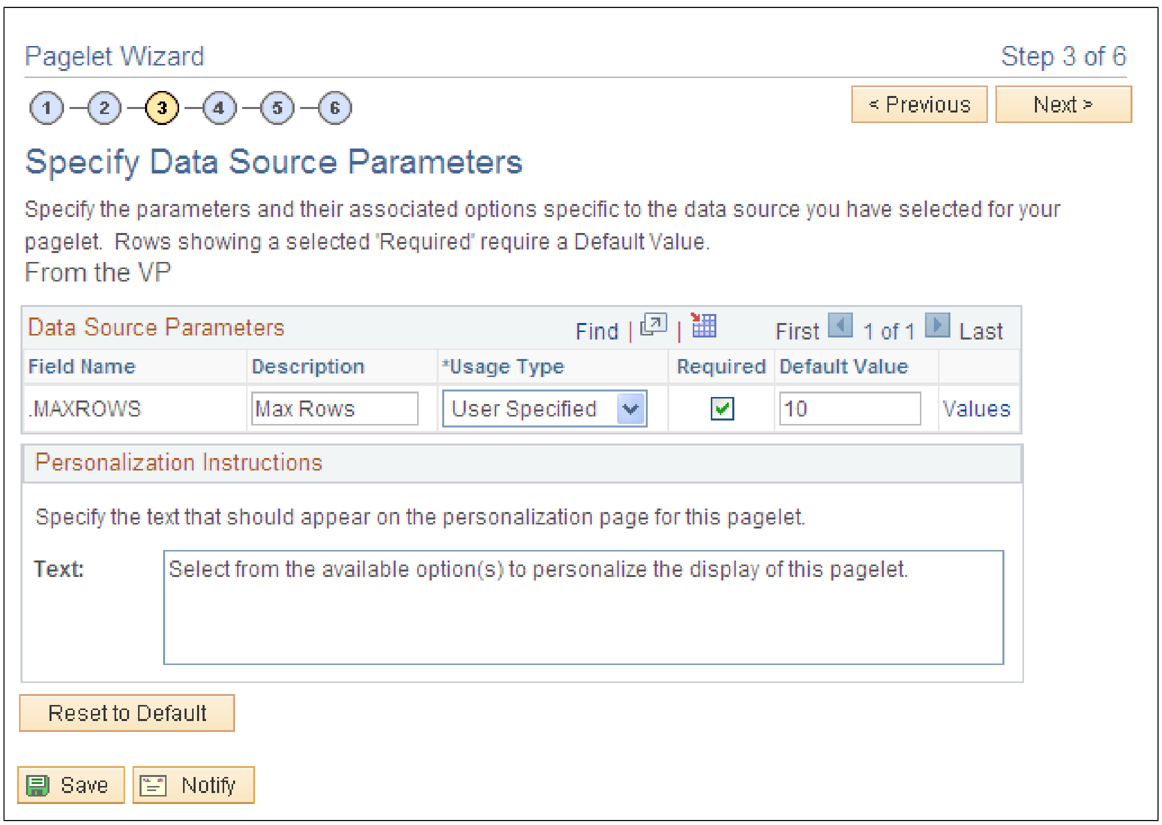
| | |
|---|---|
| **Data Type** | For blogs, select *Blogs*. |
| **Blog** | Select the blog to display in the pagelet. |
| **Inputs** | Displays the data source parameters that are used to retrieve data for the pagelet. |
| **Outputs** | Displays the data source parameter fields that are displayed as output in the pagelet. |

## Step 3: Specifying Data Source Parameters

Access the Pagelet Wizard - Specify Data Source Parameters page (select *Blogs* as the data type on the Pagelet Wizard - Select Data Source page, then click the Next button).

**Image: Pagelet Wizard - Specify Data Source Parameters page (blogs data source)**

The following example illustrates the Pagelet Wizard - Specify Data Source Parameters page (blogs data source).




Use the Pagelet Wizard - Specify Data Source Parameters page to configure the data source parameters that are required for data to be displayed in the pagelet.

---

**Note:** This page is accessible only when you are building a pagelet with a data source that allows modification of associated parameters.

---

| | |
|---|---|
| **Field Name** | Displays the name of the data source parameter.<br><br>For blogs, the following data source parameters can be defined: |

| | |
|---|---|
| | MAXROWS — Limits the number of entries displayed in the pagelet |
| **Description** | Displays a description of the data source parameter. |
| **Usage Type** | Select the type of accessibility that you want to grant for the data source parameter when it appears in the pagelet. Options are:<br>• *Admin Specified:* Select to enable those users with administrative privileges to specify variables for this field, as well as access the Configure link on the published pagelet and select from those parameters for users.<br>• *Context Sensitive:* Select to enable Context Manager to specify a data source parameter value for this field.<br>• *Fixed:* Select to enter a fixed value for the data source parameter that the end user cannot modify.<br>• *System Variable:* Select to assign a system variable as the data source parameter value. The value of the system variable is automatically inserted into the parameter when the pagelet appears. When you select this option, the pagelet end user cannot modify the data source parameter.<br>For example, suppose that you specify *%UserId* as the system variable for a parameter name User. When the pagelet appears on a user's homepage, the User field is populated by the *%UserId* system variable, which is the user ID used to access the pagelet.<br>• *User Specified:* Select to enable end users to specify a data source parameter value for this field. When a pagelet contains a user-specified parameter, the Customize button appears on the pagelet title bar.<br>End users can click this button to access a personalization page, on which they can select a data source parameter value that they want to use for the pagelet. Users can select a value from a prompt, or they can manually enter their own value if no prompt values are available.<br>If you change the usage type from or to *User Specified* for a data source parameter on a published homepage pagelet, you must unpublish and then republish the pagelet. |
| **Required** | This check box is selected and disabled for parameters specified as administrator-specified, context-sensitive, fixed, and system variable; otherwise, it is selected but enabled for user-specified parameters. |
| **Default Value** | You can enter a value that includes the % and * wildcards at the beginning or end of a value in the Default Value field. |

| | |
|---|---|
| | Note the following about default values:<br><br>• If you select *User Specified* as the usage type and the data source parameter is a required value, you must enter the default value that should appear before a user enters a value. If the data source parameter is not a required value, you do not have to enter a default value.<br><br>If you select a default value when defining prompt values on the Pagelet Wizard - Specify Data Source Parameter Values page, that default value populates this field.<br><br>If you select *User Specified* as the usage type, you can also enter a system variable as the default value. For example, to make the current date the default value for a user-specified parameter, enter a default value of *%Date.*<br><br>• If you select *System Variable* as the usage type, you must enter a system variable to use as the data source parameter value. You can use the Look up Value button to access a list of valid system variables.<br><br>See the product documentation for *PeopleTools: Portal Technology*, "Using Pagelet Wizard to Create and Manage Pagelets," Step 3: Specifying Pagelet Data Source Parameters, Understanding System Variables Supported as Data Source Parameters.<br><br>• If you select *Fixed* as the usage type, you must enter the fixed value. |
| **Values** | If you select *User Specified* or *Admin Specified* as the usage type, click Values to access the Pagelet Wizard - Specify Data Source Parameter Values page. |
| **Text** | Use the Personalization Instructions group box to enter custom personalization instructions for the pagelet. These personalization instructions appear on the personalization page of the pagelet.<br><br>**Note:** Personalization instructions must be translatable. |

### Specifying Prompt Values for Data Source Parameters

Use the Pagelet Wizard - Specify Data Source Parameter Values page (PTPPB_WIZ_PRMVALS) to specify prompt values for the end user to select from when personalizing the pagelet.

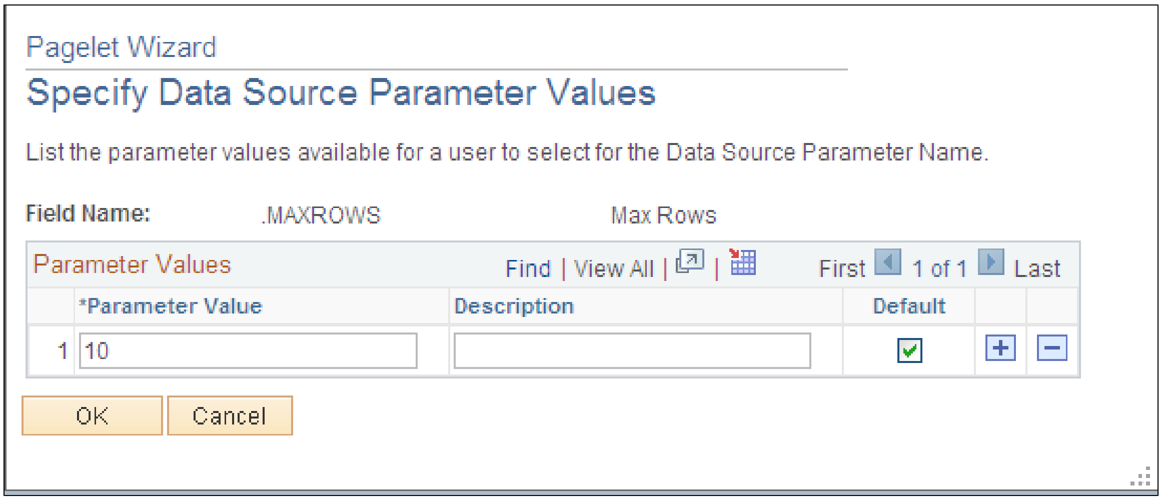
 

### Navigation

Click the Values link on the Pagelet Wizard - Specify Data Source Parameters page.

**Image: Specify Data Source Parameter Values page (blogs data type)**

The following example illustrates thef Specify Data Source Parameter Values page (blogs data type).




Use the Pagelet Wizard - Specify Data Source Parameter Values page to specify the prompt values, which are displayed to users when they personalize the pagelet. In addition, specify the default value for the parameter.

| | |
|---|---|
| **Parameter Value** | Specify the parameter value. |
| **Description** | Provide an optional description of the parameter value. |
| **Default** | Select one value as the default value. If the parameter is required, then a default value is required; otherwise, it is optional. |

## Step 4: Selecting a Pagelet Display Format

Use the Pagelet Wizard - Select Display Format page (PTPPB_WIZ_DISPFRMT) to specify the data transformation method and display format for the pagelet.

### Navigation

- Click the Next button on the Pagelet Wizard - Specify Data Source Parameters page.
- Click the Display Format button from any page in the wizard.

Use the Pagelet Wizard - Select Display Format page to specify the data transformation method and display format for the pagelet.

See the product documentation for *PeopleTools: Portal Technology*, “Using Pagelet Wizard to Create and Manage Pagelets,” Step 4: Selecting a Pagelet Display Format.

## Step 5: Specifying Pagelet Display Options

Use the Pagelet Wizard - Specify Display Options page (PTPPB_WIZ_DISP_CUS) to enter the custom formatting details for the pagelet as well as header and footer options.

Preview the pagelet.

**Navigation**

- Select *Custom* as the display format and click the Next button on the Pagelet Wizard - Select Display Format page.
- Click the Transformation button from any page in the wizard.

Use the Pagelet Wizard - Specify Display Options page to enter the custom formatting details for the pagelet as well as header and footer options, and to preview the pagelet.

---

**Note:** If you are modifying an existing pagelet definition or if you modify data source parameter definitions, you might need to reselect the XSL template, regenerate the XSL, or both to have the modified pagelet display actual data.

---

See the product documentation for *PeopleTools: Portal Technology*, “Using Pagelet Wizard to Create and Manage Pagelets,” Step 5: Specifying Pagelet Display Options.

## Step 6: Specifying Pagelet Publication Options

Use the Pagelet Wizard - Specify Publishing Options page (PTPPB_WIZ_PUBOPT) to specify the manner in which the pagelet is published.

Provide registration, caching, and security details, and register the pagelet.

**Navigation**

- Click the Next button on the Pagelet Wizard - Specify Display Options page.
- Click the Register Pagelet icon from any page in the wizard.

Use the Pagelet Wizard - Pagelet Creation Confirmed page (PTPPB_WIZ_FINISH) to confirm that the creation of the pagelet is complete.

**Navigation**

Click the Finish button on the Pagelet Wizard - Specify Publishing Options page.

Use the Pagelet Wizard - Specify Publishing Options page to specify the type of pagelet that you want to publish. In addition, provide registration, caching, and security details, and register the pagelet.

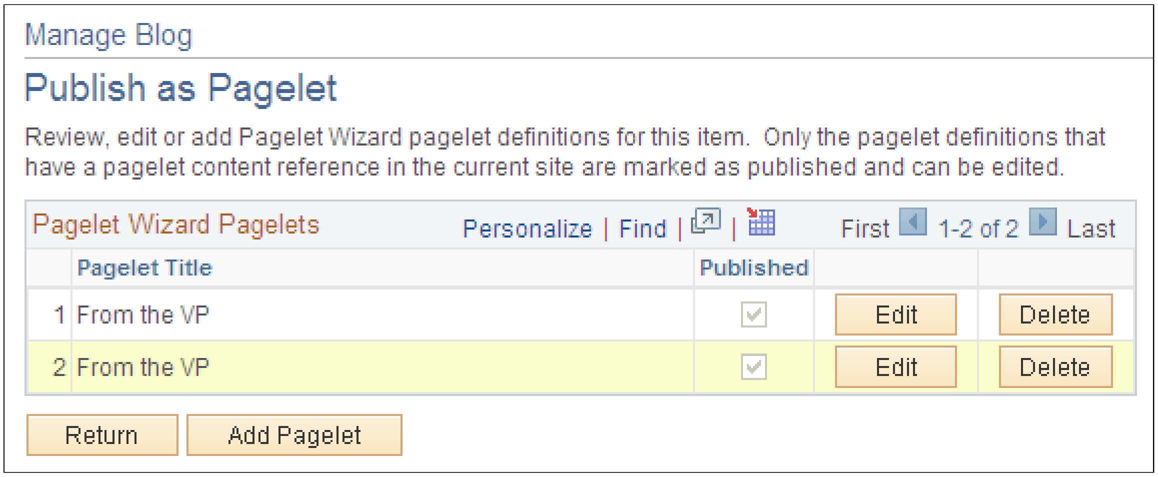
See the product documentation for *PeopleTools: Portal Technology*, “Using Pagelet Wizard to Create and Manage Pagelets,” Step 6: Specifying Pagelet Publication Options.

## Manage Blog - Publish as Pagelet Page

**Image: Manage Blog - Publish as Pagelet page**

The following example illustrates the Manage Blog - Publish as Pagelet page.




Use the Manage Blog - Publish as Pagelet page to review, edit, or add Pagelet Wizard pagelet definitions for this blog. To edit a pagelet definition, it must be marked as published and have a content reference in the current site.

---

**Note:** Pagelets for this blog published directly from Pagelet Wizard also appear in this list.

---

**Edit**

Displays the Manage Blog - Publish Pagelet Wizard Definition page on which you can make changes to the pagelet definition.

**Delete**

Deletes this pagelet definition and the published pagelet content references in all sites.

**Add Pagelet**

Adds a new pagelet definition based on the current blog.

## Publish to Multiple Portals Page

Use the Publish Multiple Pagelets page (PTPP_PMPUBPGLT) to publish multiple pagelet definitions to another portal or site.

**Navigation**

- On the Publish to Multiple Portals page, select Publish Multiple Pagelets.
- Portal Administration, Pagelets, Publish Pagelets, Publish Multiple Pagelets
- PeopleTools, Portal, Portal Utilities, Publish Pagelets, Publish Multiple Pagelets

Two pages are available for you to publish pagelets to multiple portals:

- Use the Publish to Multiple Portals page to publish the pagelet definition to additional portals and sites.
- Use the Publish Multiple Pagelets page to publish multiple pagelet definitions to another portal or site.

See the product documentation for *PeopleTools: Portal Technology*.

# Using Blog Notifications

This topic discusses how to send email notifications to blog participants.

## Pages Used for Blog Notifications

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| Notify Members Page | EPPCW_MBNOTIFY | Compose and send an email message to the blog participants. |

## Notify Members Page

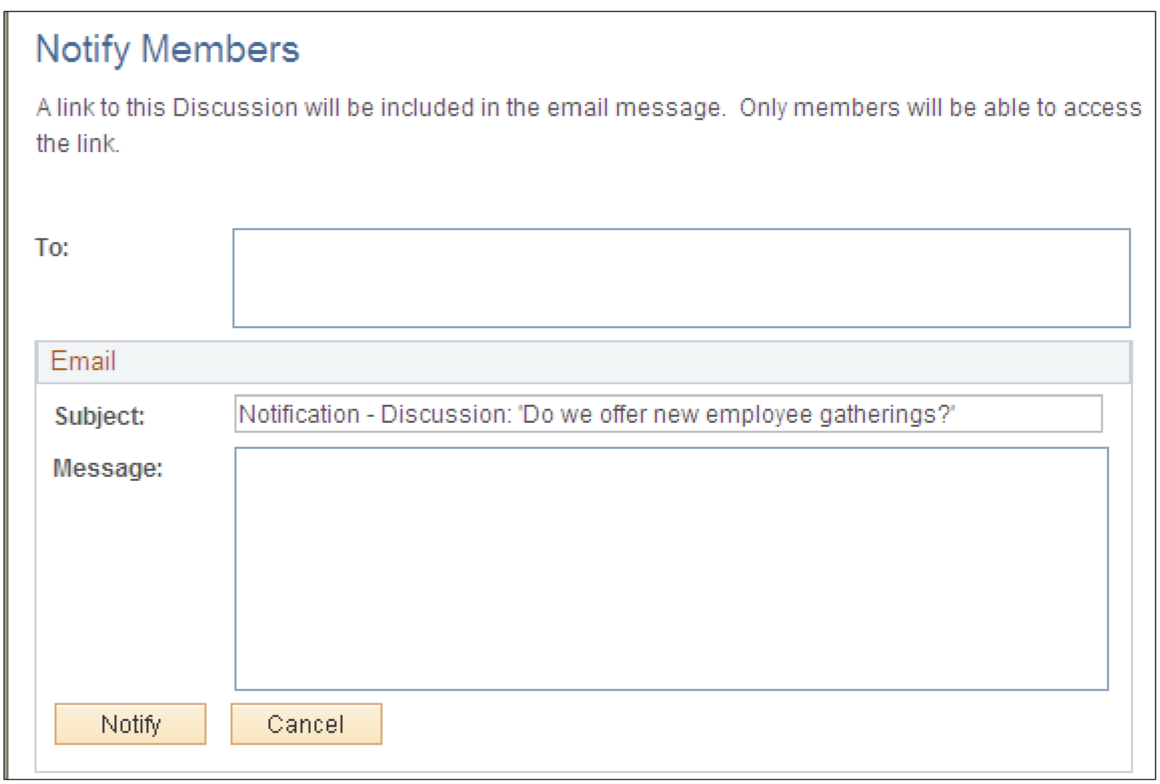
Use the Notify Members page (EPPCW_MBNOTIFY) to compose and send an email message to the blog participants.

**Navigation**

Click the Notify link on the post details page.

**Image: Notify Members page**

This example illustrates the fields and controls on the Notify Members page. You can find definitions for the fields and controls later on this page.



Use the Notify Members page to compose and send an email message to blog participants. The To field is automatically populated with addresses for all members of the blog who have defined an email address in their system profile.

---

**Note:** The email will contain a link to the blog. Only members of the blog will be able to access the blog through the link.

---

| | |
|---|---|
| **To** | Enter additional email addresses for blog participants separated by commas. |
| **Subject** | Enter a subject for the email. |
| **Message** | Enter the message text for your email. |
| **Notify** | Click to send the notification. |

# Performing Searches Within Blogs

This topic provides an overview of searching within blog and describes how to search within blogs.

## Pages Used to Search Within Blogs

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| Search Blogs Page | EPPSR_SEARCH | Perform a search across all blogs and portals. |
| Global Search Page | PTSF_GLOBAL_SEARCH | Perform a search across all blogs and portals.<br><br>See Global Search. |

## Understanding Searching Within Blogs

You can search for items within a blog in two ways:

- Using the Search link on pages within the blog.

  The Search Blogs page allows you to search across all blogs and portals.

- Using the Search field in Global Search in the portal header.

  The *Blogs* search group allows you to search across all blogs and portals.

## Search Blogs Page

Use the Search Blogs page (EPPSR_SEARCH) to perform a search across all blogs and portals.

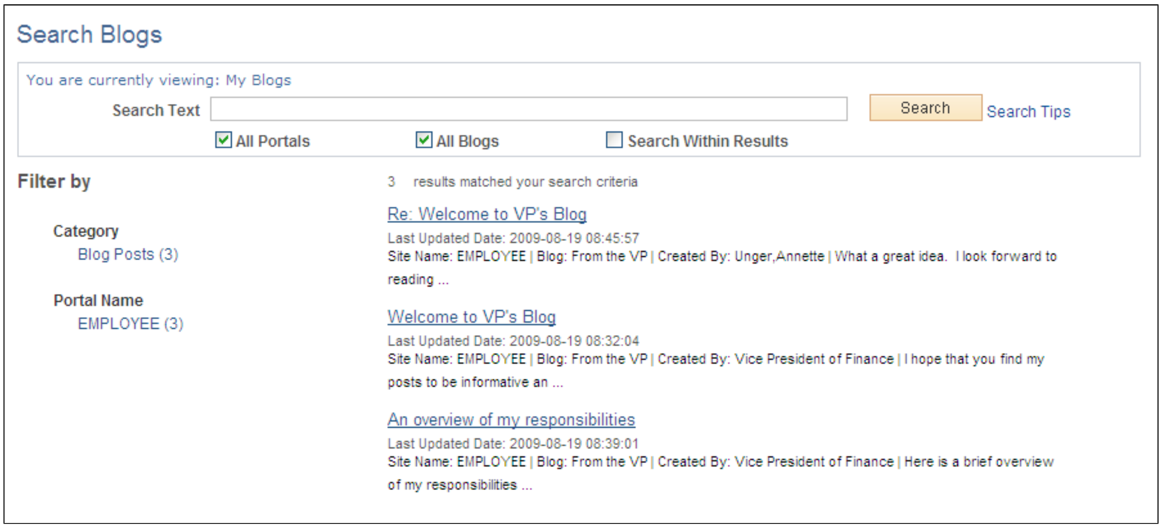
 

**Navigation**

- Click the Search link on the blog homepage.
- Click the Search link on the post details page.
- Click the Search Blogs link in the Blogs pagelet.

**Image: Search Blogs page**

This example illustrates the fields and controls on the Search Blogs page. You can find definitions for the fields and controls later on this page.




Use the Search Blogs page to perform a search across all blogs and portals.

---

**Note:** When a search is initiated without selecting any blog, the search scope defaults to All Blogs. When you select a blog and then click the Search link on the selected blog page, the search scope defaults to the current blog.

---

**Search Text**

Enter the search criteria.

> **Note:** Do not use blank or * (asterisk); these are not valid search criteria.

**Search Tips**

Click to display search syntax and examples on the Search Tips page.

**All Portals**

Select to search within all portals.

**All Blogs**

Select to search within all blogs of which you are a member.

**Search Within Results**

Select to search within the search results.

**Search**

Click to perform the search.

**Filter by**

This is the facet pane, which is the area to the left of the search results. Use the facets to filter the search results and drill down closer to the desired information.

| | |
|---|---|
| | *Category* — Select a category to filter the search by the selected category.<br><br>*Portal Name* — Select a portal to filter the search by the selected portal. |
| **Return to <Blog Title>** | If the search originated from a particular blog, click to return to that blog or post. |

# Working With the Blogs Pagelet

This topic discusses personalizing and using Blogs pagelet.

## Page Used to Personalize the Blogs Pagelet

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| Personalize Blogs Page | EPPDF_USER_PREF | Select the blogs and options for display in your Blogs pagelet. |

## Understanding the Blogs Pagelet

The Blogs pagelet lists blogs, posts, and replies. If you do not personalize the Blogs pagelet, the pagelet displays the first 10 blogs to which you have access, including those blogs created with the *Show in the Blogs Pagelet by Default for All Members* option selected, with three posts per blog and three replies per post. When it appears in the right (wide) column of a two-column layout, the pagelet also provides identification of the author of a post or reply, as well as the date of the post. In any other column, the pagelet does not provide this additional information.

## Personalize Blogs Page

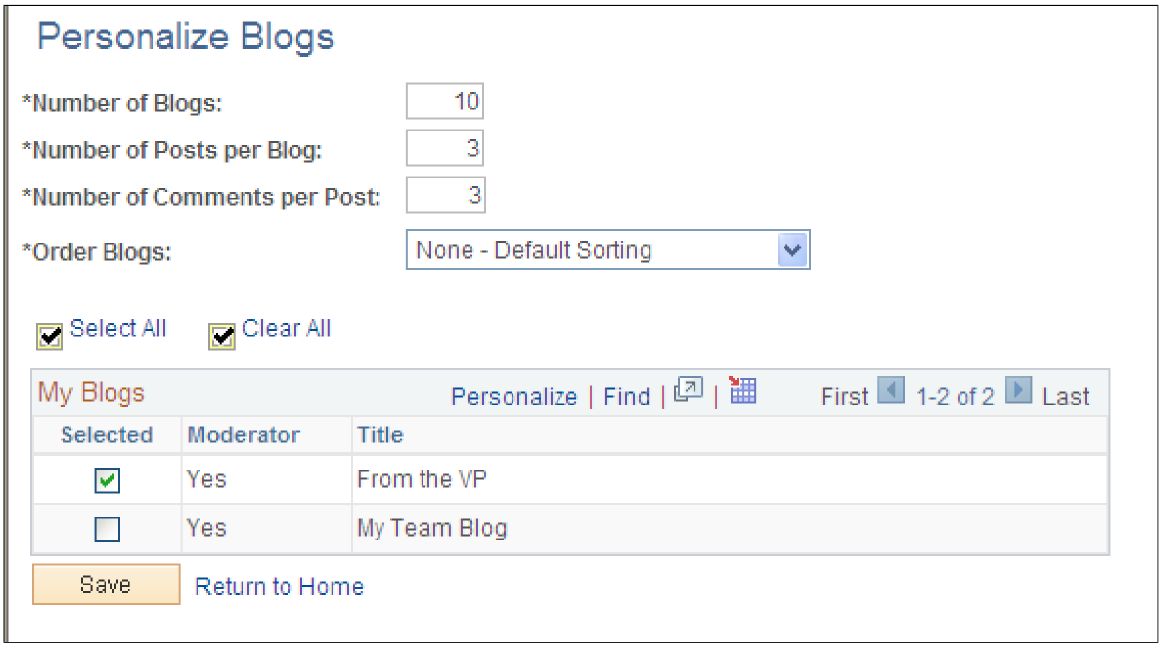
Use the Personalize Blogs page (EPPDF_USER_PREF) to select the blogs and options for display in your Blogs pagelet.

**Navigation**

Click the Customize button in the Blogs pagelet.

**Image: Personalize Blogs page**

The following example illustrates the Personalize Blogs page.




Use the Personalize Blogs page to select the blogs and options for display in your Blogs pagelet.

**Number of Blogs**

Enter the maximum number of blogs you want to display in the pagelet. The default value is 10. The maximum number is 99.

**Number of Posts per blog**

Enter the maximum number of posts that you want to display per blog in the pagelet. The default value is 3. The maximum number is 99.

**Number of Comments per Post**

Enter the maximum number of comments you want to display per post in the pagelet. The default value is 3. The maximum number is 99,999.

**Order Blogs**

Select one of the following:

- *Alphabetically - Ascending* — Select to sort by blog title in ascending order.
- *None - Default Sorting* — Select to have no sort order. This is the default.
- *Time Ascending* — Select to sort by date and time of creation in ascending order.
- *Time Descending* — Select to sort by date and time of creation in descending order.

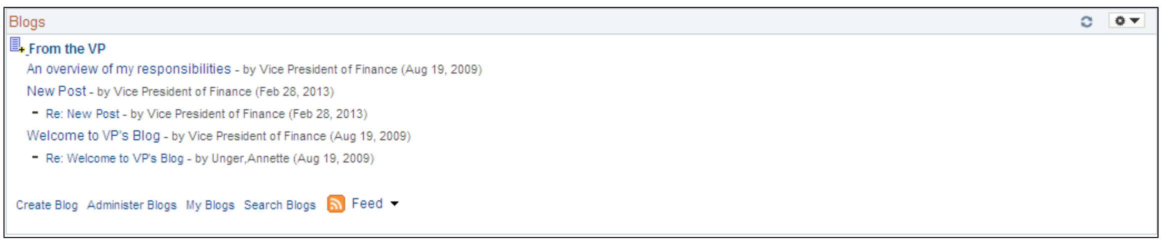
- *User Defined* — Select to order explicitly by number. An Order of Appearance column appears in the My Blogs grid.

| | |
|---|---|
| **Select All** | Select to select all blogs. |
| **Clear All** | Select to clear all selected blogs. |
| **Selected** | Select the blogs you want to display on the pagelet. |

## Blogs Pagelet

**Image: Blogs pagelet**

The following example illustrates the Blogs pagelet. Access the Blogs pagelet on the portal homepage.




Use the Blogs pagelet to access and manage blogs, posts, and comments.

Click the Add New Post button to access the Create New Post page within the corresponding blog.

**<Blog Title>** — Click a blog link to access the blog's homepage on which you can view details about the blog.

The hover text of the blog link displays the description of the blog.

**<Post Title>** — Click a post link to access the post details page on which you can view details about the post.

**<Comment Title>** — Click a comment link to access the post details page on which you can view details about the post and comment.

**Create Blog** — Click to access the Create Blog page from which you can create a new blog. This link displays for users with blog creation privileges.

**Administer Blogs** — Click to access to the Administer Blogs page for all blogs. This link displays for portal administrators only.

**My Blogs** — Click to access to the My Blogs page.

**Search Blogs** — Click to access the Search Blogs page on which you can perform a search of text in the blogs to which you belong.


Hover over any of these to view the list of feeds published for this blog. 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.

See Viewing and Subscribing to Feeds.

## Chapter 8

# Working With Community Calendars

## Understanding Community Calendars

Community calendars provide a way for groups to share, organize, and communicate about events that pertain to their organization or group. Calendar membership can be assigned for users or roles and have different privileges including the ability to view, create, and edit the events for a calendar. Users can view calendars online in pagelets or in the full-page view accessible from the pagelet or the menu navigation.

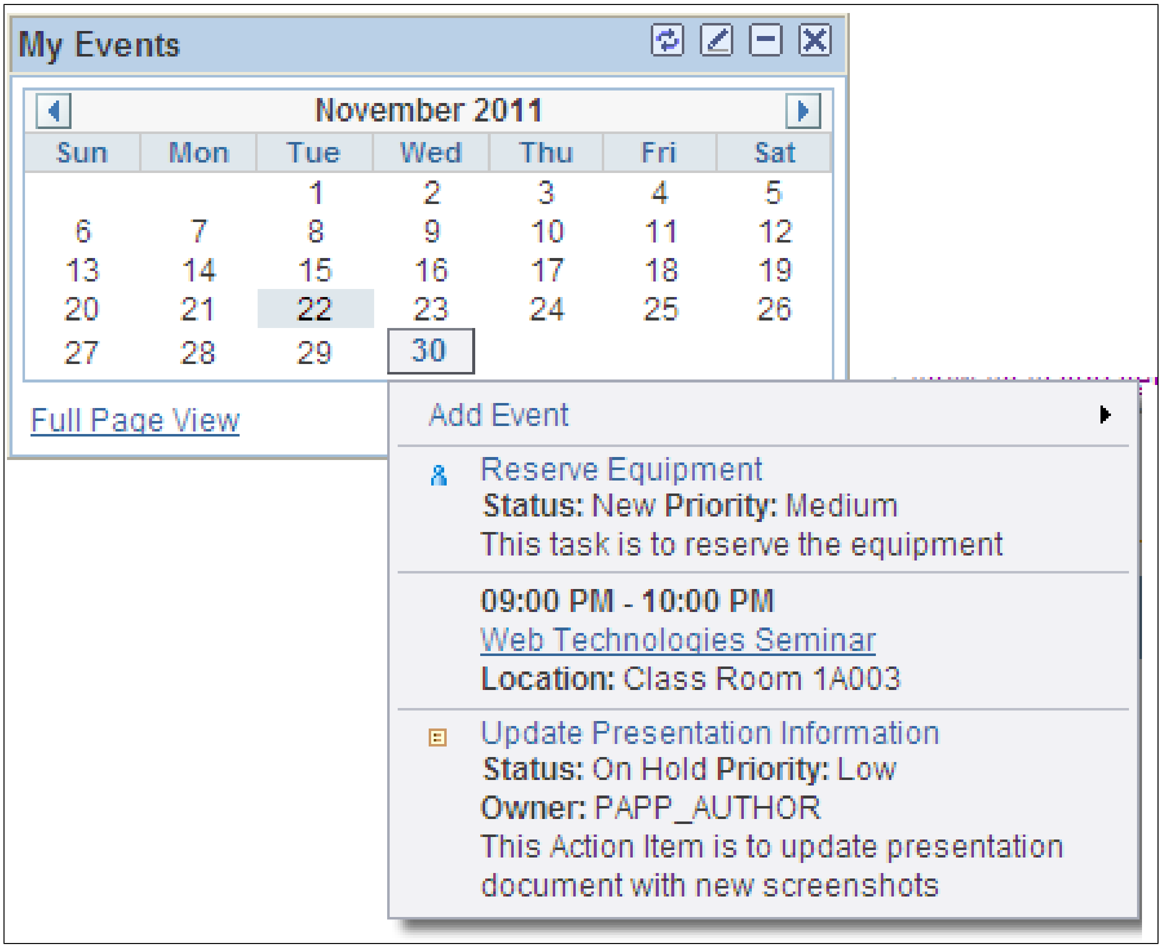
Calendars can be accessed from portals, sites, and workspaces. Calendars exist in a *standalone* form in portals and sites. Standalone calendars are accessible in portals and sites through the My Community Calendars page under the My Content menu. In workspaces, a calendar is available in the Calendar module that is part of the workspace.

### Understanding the My Events Pagelet

The My Events pagelet is a delivered homepage pagelet that shows all of the events, action items, and tasks a user has access to across portals and sites (if personalized to do so). Users can personalize the appearance of this pagelet to show a monthly, weekly, or daily view and to select one or more calendars from which to retrieve events and one or more action item lists from which to retrieve action items.

**Image: My Events pagelet (monthly view)**

The following example illustrates the My Events pagelet (monthly view) which shows the My Events pagelet in a monthly view displaying events from a calendar, action item list, and task list:




The calendar in the My Events pagelet allows you to view the following items:

| | |
|---|---|
| **Calendar events** | Maintained on one or more calendars configured to display in the pagelet. |
| **Action items** | Maintained on one or more action item lists configured to display in the pagelet. |
| **Tasks** | Personal tasks created and maintained by you. |

See Working With the My Events Pagelet.

## Understanding the Calendar Module in Collaborative Workspaces

In a workspace, the Calendar module enables 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 workspace events in the Calendar pagelet and in the Upcoming Events pagelet on the workspace homepage or in the full-page view in the Calendar module. Similar to the My Events pagelet, the Calendar pagelet can simultaneously display the workspace calendar, workspace action items, and a user's tasks.

---

**Note:** Action items and tasks are not be displayed in the full-page view of a workspace calendar.

---

See "Using the Calendar Module" (PeopleSoft Interaction Hub 9.1: Collaborative Workspaces).

# Creating Community Calendars

This topic discusses creating, accessing community calendars and assigning community calendar participants and privileges.

Use the Calendar Properties page (EPPCA_CAL_DETAIL) to maintain the properties for the calendar.

**Navigation**

- Click the Add Calendar  button on the My Community Calendars page.
- Click a Properties link on the My Community Calendars page.

## Pages Used to Create Community Calendars

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
| --- | --- | --- |
| My Community Calendars Page | EPPCA_BROWSE | View and manage community calendars. |
| Calendar Properties Page | EPPCA_CAL_DETAIL | Maintain the properties for the calendar. |
| Calendar Security Page | EPPCA_CAL_MEM | Manage calendar members and privileges. |

## My Community Calendars Page

Use the My Community Calendars page (EPPCA_BROWSE) to view and manage community calendars.

**Navigation**

My Content, My Community Calendars

**Image: My Community Calendars page**

This example illustrates the fields and controls on the My Community Calendars page. You can find definitions for the fields and controls later on this page.


Use the My Community Calendars page to browse through the list of calendars in the current portal that you are a member of and have permission to view. If you have permission to create a calendar, the Add Calendar button appears on the page.

**Add Calendar**

Click to create a new calendar.

**Note:** The Add Calendar button only appears for those users who have permission to create a calendar.

**Display Active Calendars or Display Inactive Calendars**

If you have created calendars that have been set to a status of *inactive,* the system displays a drop-down list box on the page the enables you to display either active calendars or all inactive calendars that you have created.

**Search**

Click to access the Search Community Calendars page on which you can search for calendar events.

**Title**

Click the calendar title to access the calendar.

**Properties**

Click to view the Calendar Properties page on which you can modify calendar properties.

**Note:** The Properties link appears only for administrators of the calendar.

**Delete**

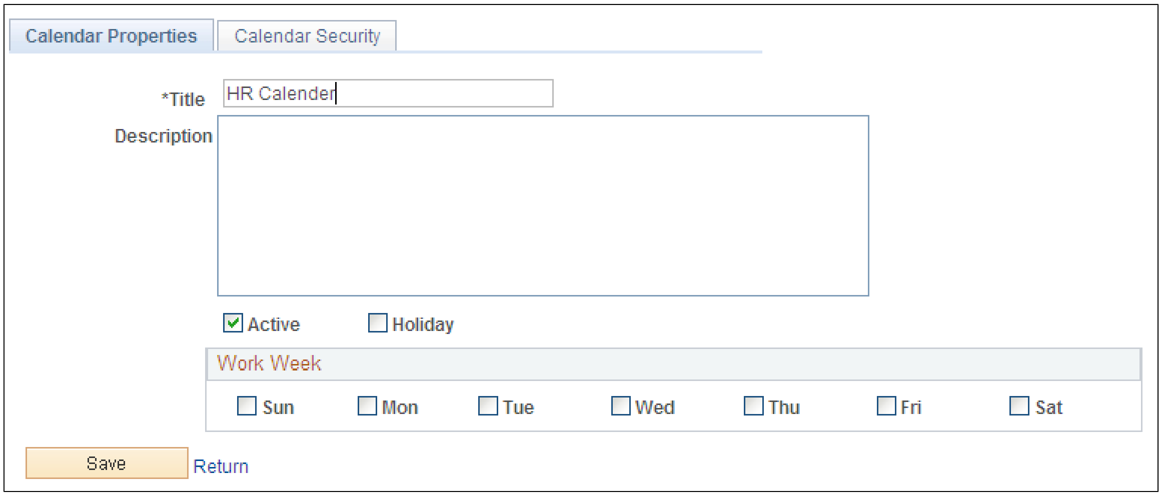
Click to delete the calendar.

**Note:** The Delete button appears only for administrators of the calendar.

## Calendar Properties Page

**Image: Calendar Properties page**

This example illustrates the fields and controls on the Calendar Properties page. You can find definitions for the fields and controls later on this page.




Enter a name for the calendar in the Title field as well as descriptive information about the calendar.

**Title**

Enter the name of the calendar. The text you enter in this field becomes the title of the calendar.

**Description**

Enter a description for the calendar.

**Active**

Select this option to make the calendar active and have the calendar appear in the portal or site. If this option is not selected, the calendar is not be available to users.

**Holiday**

Select this option to specify this calendar as a holiday calendar. If this option is not selected, this calendar is considered a regular calendar.

**Work Week**

Select the days of the work week for this calendar to override the work week defined at the system level on the Installation Options page.

See "Defining Installation Options" (PeopleSoft Interaction Hub 9.1: Portal and Site Administration).

**Publish as Pagelet**

Displays the List Properties - Publish Pagelet Wizard Definition page on which you can publish the calendar pagelet to the homepage.

## Calendar Security Page

Use the Calendar Security page (EPPCA_CAL_MEM) to manage calendar members and privileges.

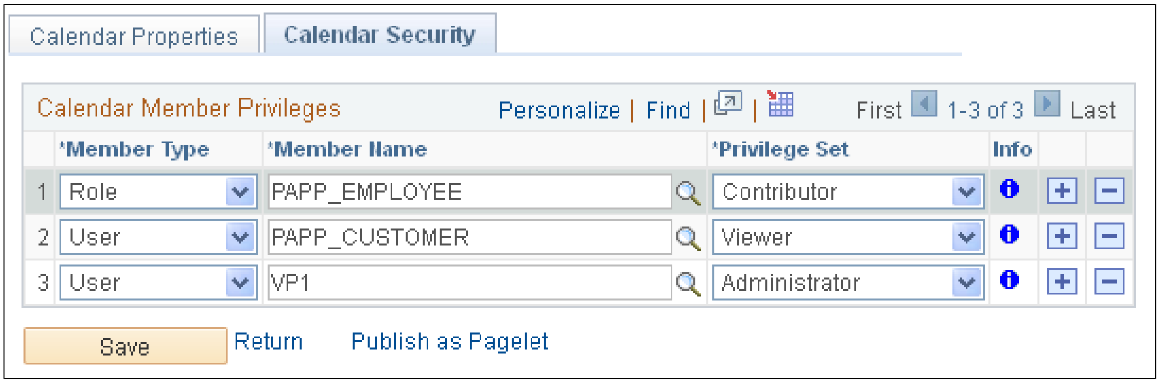
 

### Navigation

Select Calendar Security on the Calendar Properties page.

### Image: Calendar Security page

This example illustrates the fields and controls on the Calendar Security page. You can find definitions for the fields and controls later on this page.




Use the Calendar Security page to assign calendar members and privileges.

**Member Type**

Select the type of participant you want to add to the calendar:

- *Role* — Select to be able to select a role in the Member Name field. Available group names are derived from PeopleSoft roles defined in the Roles component.

  See the product documentation for *PeopleTools: Security Administration*, “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 in the User Profiles component.

  See the product documentation for *PeopleTools: Security Administration*, “Administering User Profiles.”

**Member Name**

Select the role or user ID.

**Privilege Set ID**

Select a privilege level you want to assign to the member:

*Administrator*. Administrators can add, edit, or delete calendar events. In addition, they can add and delete calendar members.

*Contributor*. Contributors can add or edit calendar events. They can delete their own calendar events, but not those belonging to others.

*Viewer*. Viewers have read-only access to the calendar and calendar events.

Click to view additional information about the actions that the privilege set enables the member to use.

| | |
|---|---|
| **Publish as Pagelet** | Displays the List Properties - Publish Pagelet Wizard Definition page on which you can publish the calendar pagelet to the homepage. |

# Using Community Calendars

This topic discusses common elements in working with community calendars

## Pages Used with a Community Calendars

| *Page Name* | *Definition Name* | *Usage* |
|---|---|---|
| My Community Calendars Page | EPPCA_BROWSE | Use to select a calendar. |
| <Calendar> homepage (monthly view) | EPPCA_MONTHLY | View calendar events for the current month.<br><br>Monthly is the default view for calendars.<br><br>See Selecting Calendar Views. |
| <Calendar> homepage (daily view) | EPPCA_DAILY | View calendar events for a specific day.<br><br>See Selecting Calendar Views. |
| <Calendar> homepage (weekly view) | EPPCA_WEEKLY | View calendar events for a specific week.<br><br>The start date for a week is specified on the Regional Settings page.<br><br>See Selecting Calendar Views. |
| <Calendar> homepage (yearly view) | EPPCA_YEARLY | View calendar events for an entire year.<br><br>See Selecting Calendar Views. |
| Community Calendar Page | EPPCA_MONTHLY<br><br>EPPCA_DAILY<br><br>EPPCA_WEEKLY<br><br>EPPCA_YEARLY | View events from all of your calendars or for a specific calendar.<br><br>The default view for this page is the same as the view specified for the My Events pagelet. The default scope is all calendars, regardless of which calendars were selected for the My Events pagelet.<br><br>See Selecting Calendar Views. |
| Event View Page | EPPCA_EVENT_VIEW | View the information for an event.<br><br>This page is referred to as the event view page. |
| Search Community Calendars Page | EPPCA_SEARCH | Search for events in calendars across all portals and sites. |

| Page Name | Definition Name | Usage |
|---|---|---|
| Add/Remove Holiday Calendars Page | EPPCA_HOLIDAY_SEL | Add or remove a holiday calendar to this calendar. |

## Common Elements Used in This Section

**Add Event**

Click this button to add an event to the calendar. This button appears on all calendar views if you have contributor or administrator privileges for the calendar.

See Creating Calendar Events.

 **Alerts**

Click the Alerts link or this icon to access the Add Alert Subscription page on which you can subscribe to email alerts that keep you informed of updates to the selected calendar.

See Using Calendar Alerts and Notifications.

**Search**

Click to access the Search Community Calendars page on which you can search for events in calendars across all portals and sites.

Click the Previous button to scroll backward. For example, on the monthly view of the calendar homepage, click this button to display the previous month. In same view, in the left column, click the Previous button to display the list of months for the previous year.

Click the Next button to scroll forward. For example, on the weekly view of the calendar homepage, click this button to display the next week. In same view, in the left column, click the Next button to scroll the display of months forward by one month.

Indicates a recurring event.

Indicates an all-day event.

**Go to My Calendars**

Click to access the My Community Calendars page that lists all available calendars within the current portal.

**Add/Remove Holiday Calendar(s)**

Click to access the Add/Remove Calendars page to add or remove available holiday calendars.

## Selecting Calendar Views

This section discusses how to:

- Personalize regional settings for calendars.
- View your community calendars.

- View a monthly calendar.
- View a daily calendar.
- View a weekly calendar.
- View a yearly calendar.
- View events from all calendars.

## Personalizing Regional Settings for Calendars

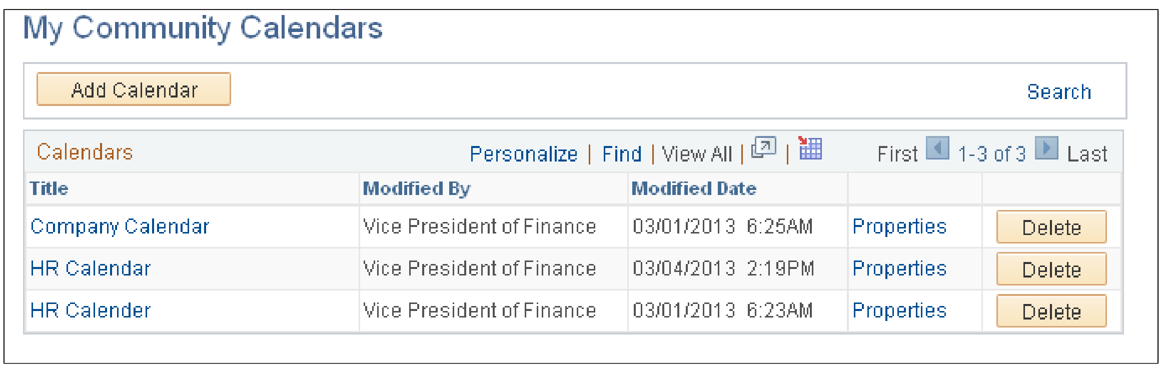
Regional settings such as date and time formats for calendars are set on the Regional Settings page. On the portal homepage, select My Personalizations, Regional Settings to personalize your date, time, and number formats. Select settings for afternoon and morning designators (AM/PM or am/pm), date format (MMDDYY, DDMMYY, or YYMMDD), a local time zone, and so on.

See the product documentation for *PeopleTools: Applications User's Guide*, “Setting User Preferences,” Setting User Personalizations.

## Viewing Your Community Calendars

**Image: My Community Calendars page**

The following example illustrates the My Community Calendars page. Access the My Community Calendars page (My Content, My Community Calendars) as shown below.




Use the My Community Calendars page to browse through the list of calendars in the current portal that you are a member of and have permission to view. On this page, you can access specific calendars, In addition, from this page, you can add a new calendar or manage calendar properties and membership if you have permission to do so.

See My Community Calendars Page.

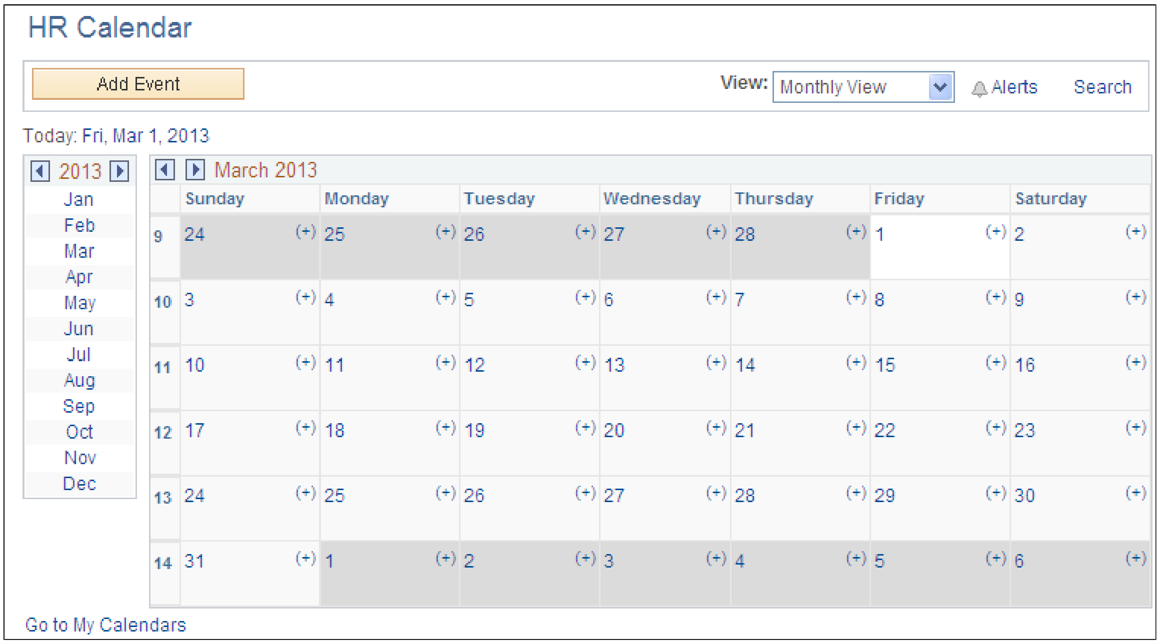
## Viewing a Monthly Calendar

Click the link for the calendar title on the My Community Calendars page. Click the link for a calendar on the My Community Calendars page to access the monthly view of the calendar homepage.

**Note:** The monthly view is the default view for a calendar.

**Image: Calendar homepage (monthly view)**

The following example illustrates the Calendar homepage (monthly view).




Use the monthly view of the calendar homepage to view dates and events for an entire month.

Event titles appear on the days that have an event scheduled. Hover over an event title to display a tool tip with the event details. Click the event title to access the event view page showing additional event information.

To add an event to this calendar, you can either click the Add Event button or click the (+) link on a specific date in the calendar.

**Note:** You must have contributor or administrator privileges to add an event to the calendar.

To display a different view of this calendar:

- To display a different month, click the month link in the left column. Alternatively, click the Next or Previous arrows in the title bar of the monthly calendar view.
- To display a daily view for a specific date, click the link for that date in the calendar. For a daily view of today's date, click the Today field link to the left above the title bar for the calendar.

  Alternatively, to display a daily view, select *Daily View* above the title bar for the calendar.

  **Note:** The date defaults to the first of the month, or the last date viewed in that month.
- To display a weekly view for a specific week, click the week number at the left side of the calendar.

  Alternatively, to display a weekly view, select *Weekly View* above the title bar for the calendar.

**Note:** The week defaults to the first week of the month, or the week containing the last date viewed in that month.

- To display a yearly view, select *Yearly View* above the title bar for the calendar.

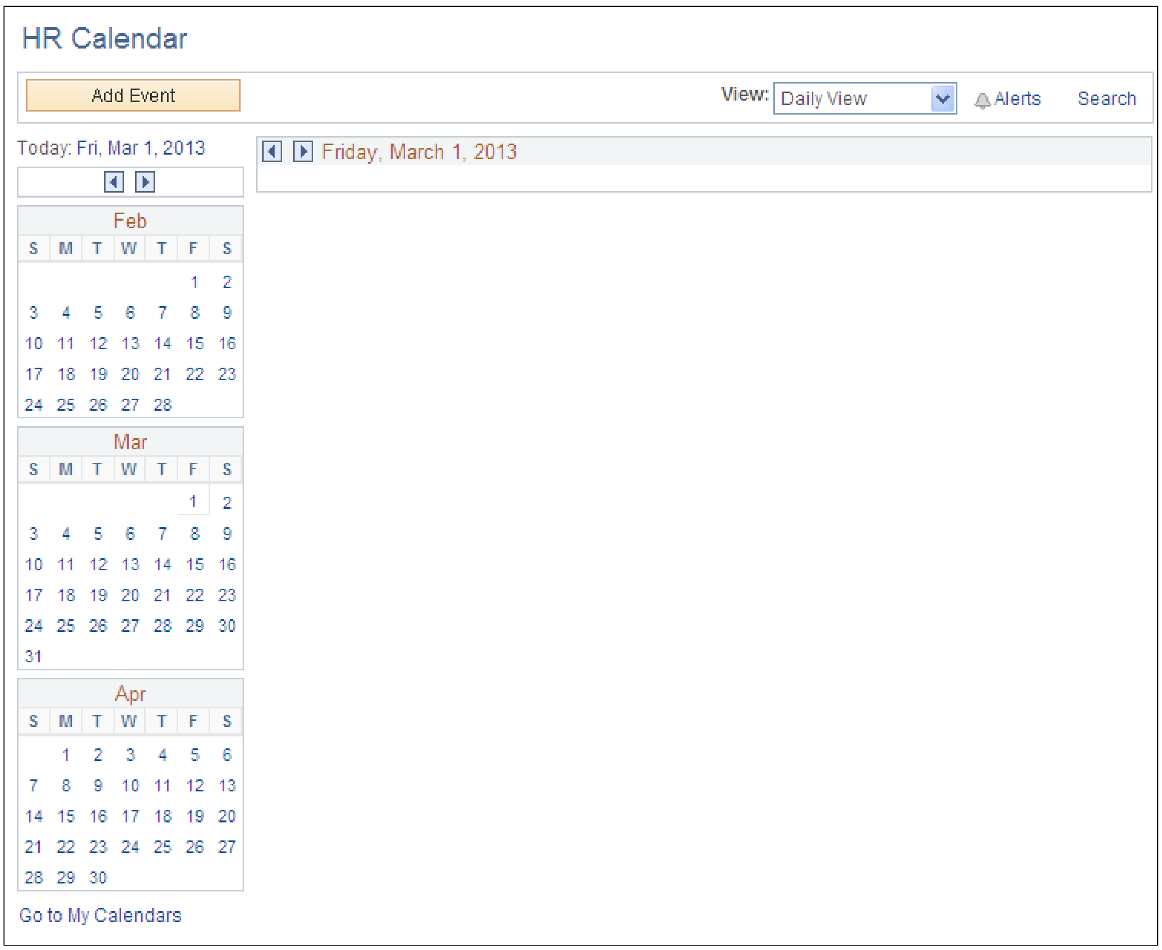
**Note:** The year defaults to the year of the currently displayed month.

## Viewing a Daily Calendar

On the calendar homepage, click the link for any date. You can also click the link for any date on the calendar homepage to access the daily view of the calendar homepage.

**Image: Calendar homepage (daily view)**

The following example illustrates the Calendar homepage (daily view).




Use the daily view of the calendar homepage to view all events for the specified date.

Click an event title to access the event view page showing additional event information. Click the link for an event contact to view the profile for that person in a separate window.

To add an event to this calendar, click the Add Event button.

**Note:** You must have contributor or administrator privileges to add an event to the calendar.

To display a different view of this calendar:

- To display a daily view for a different date, click the link for that date in one of the months in the left column. Alternatively, click the Next or Previous arrows in the title bar of the daily calendar view. For a daily view of today's date, click the Today field link to the left above the title bar for the calendar.
- To display a monthly view of the calendar, select *Monthly View* above the title bar for the calendar.

  **Note:** The month defaults to the month of the currently displayed date.

- To display a weekly view of the calendar, select *Weekly View* above the title bar for the calendar.

  **Note:** The week defaults to the week of the currently displayed date.

- To display a yearly view of the calendar, select *Yearly View* above the title bar for the calendar.

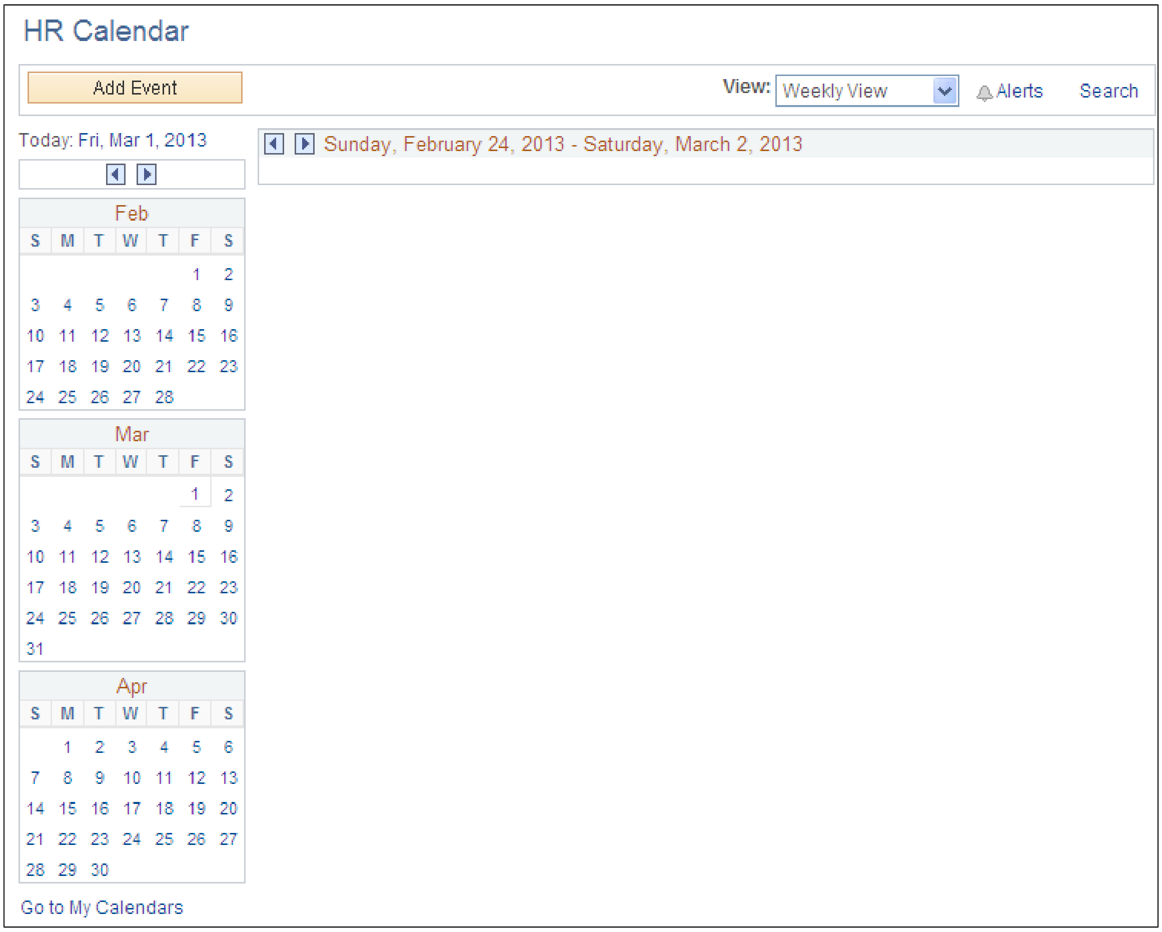
  **Note:** The year defaults to the year of the currently displayed date.

## Viewing a Weekly Calendar

Access the weekly view of the calendar homepage (select *Weekly View* in the drop-down list box above the calendar title bar).

**Image: Calendar homepage (weekly view)**

The following example illustrates the Calendar homepage (weekly view).




Use the weekly view of the calendar homepage to view all events for the specified week.

Click an event title to access the event view page showing additional event information. Click the link for an event contact to view the profile for that person in a separate window.

To add an event to this calendar, click the Add Event button.

---

**Note:** You must have contributor or administrator privileges to add an event to the calendar.

---

To display a different view of this calendar:

- To display a weekly view for a different week, click the Next or Previous arrows in the title bar of the weekly calendar view.
- To display a daily view of the calendar, click the link for that date in one of the months in the left column. For a daily view of today's date, click the Today field link to the left above the title bar for the calendar.

Alternatively, to display a daily view, select *Daily View* above the title bar for the calendar.

**Note:** The date defaults to the first of the week, or the last date viewed in that week.

- To display a monthly view of the calendar, select *Monthly View* above the title bar for the calendar.

**Note:** The month defaults to the month of the currently displayed week.

- To display a yearly view of the calendar, select *Yearly View* above the title bar for the calendar.

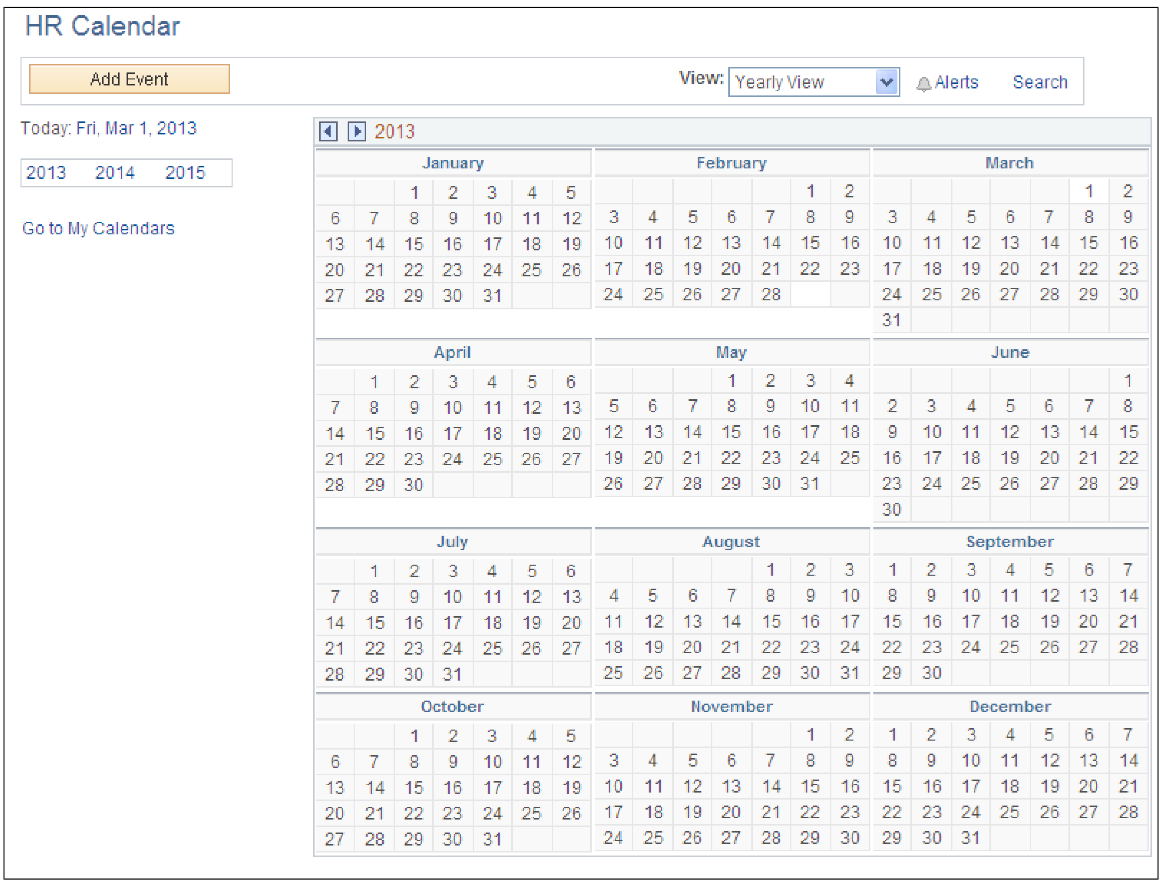
**Note:** The year defaults to the year of the currently displayed week.

## Viewing a Yearly Calendar

Access the yearly view of the calendar homepage (select *Yearly View* in the drop-down list box above the calendar title bar).

**Image: Calendar homepage (Yearly view)**

The following example illustrates the Calendar homepage (Yearly view).




Use the yearly view of the calendar homepage to view all events for the specified year.

**Note:** Bold and underlined dates indicate that there is an event associated with that date. Click the date to display the daily view of the calendar for that date.

To add an event to this calendar, click the Add Event button.

---

**Note:** You must have contributor or administrator privileges to add an event to the calendar.

---

To display a different view of this calendar:

- To display a yearly view for a different year, click the Next or Previous arrows in the title bar of the yearly calendar view. Alternatively, click the link for that year in the left column.
- To display a daily view of the calendar for a specific date that contains an event, click a bold and underlined date.

  Alternatively, to display a daily view, select *Daily View* above the title bar for the calendar.

  ---

  **Note:** The date defaults to the last date viewed in the currently displayed year, or today's date in the currently displayed year.

  ---
- To display a weekly view of the calendar, select *Weekly View* above the title bar for the calendar.

  ---

  **Note:** The week defaults to the week of the last date viewed in the currently displayed year, or the week of today's date in the currently displayed year.

  ---
- To display a monthly view of the calendar, select *Monthly View* above the title bar for the calendar.

  ---

  **Note:** The month defaults to the month of the last date viewed in the currently displayed year, or the month of today's date in the currently displayed year.

  ---

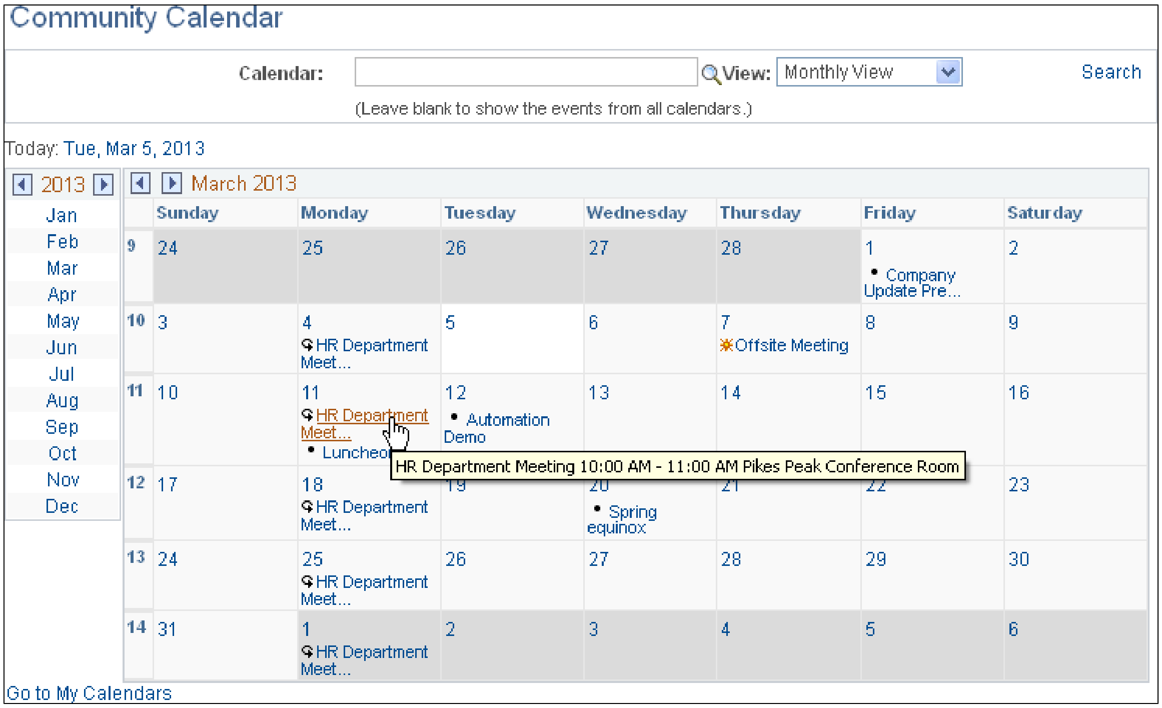
 

## Viewing Events from All Calendars

Access the Community Calendar page (click the Full Page View link in the My Events pagelet).

**Image: Community Calendar page (displaying events from all calendars)**

The following example illustrates the Community Calendar page (displaying events from all calendars). Access the Community Calendar page (click the Full Page View link in the My Events pagelet as shown below.




---

**Note:** Action Items and tasks will not be displayed in the Full Page View of My Events, even if they are showing in the pagelets.

---

Use the Community Calendar page to display a combined view of all events from all calendars of which you are a member (which is also known as a *unified calendar*). You can also view events for a specific calendar on this page.

---

**Note:** The default view for this page is the same as the view specified for the My Events pagelet. The default period is the period that was being viewed in the pagelet when you clicked the Full Page View link. The default scope is *all calendars,* regardless of which calendars were selected for the My Events pagelet. However the page view does not show action items or tasks configured for the My Events pagelet.

---

Leave the Calendar field blank to view events from all calendars. Otherwise, look up or enter the name of a specific calendar to view events for that calendar only.

Similar to a calendar homepage, you can change the period viewed by selecting from the View drop-down list box; by selecting a specific date, week, month, or year; or by navigating with the Next and Previous arrows in the calendar title bar.

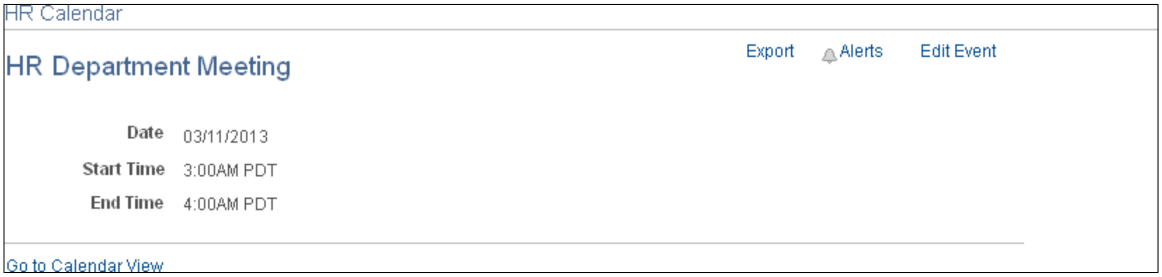
Creating Community Calendars

## Event View Page

**Image: Event view page**

The following example illustrates the Event View page. Access the Event View Page (click the link for an event on the calendar homepage, or click the link for an event in the My Events pagelet) as shown below.




**Export**

Click to export event information to add the event to your personal calendar application.

**Alerts**

Click to subscribe to or update email alerts for the event.

See Using Calendar Alerts and Notifications.

**Edit Event**

Click to access the Event Details page on which update the event information.

---

**Note:** This link is displayed only if you are a contributor to the calendar and you created this event, or if you are an administrator of the calendar.

---

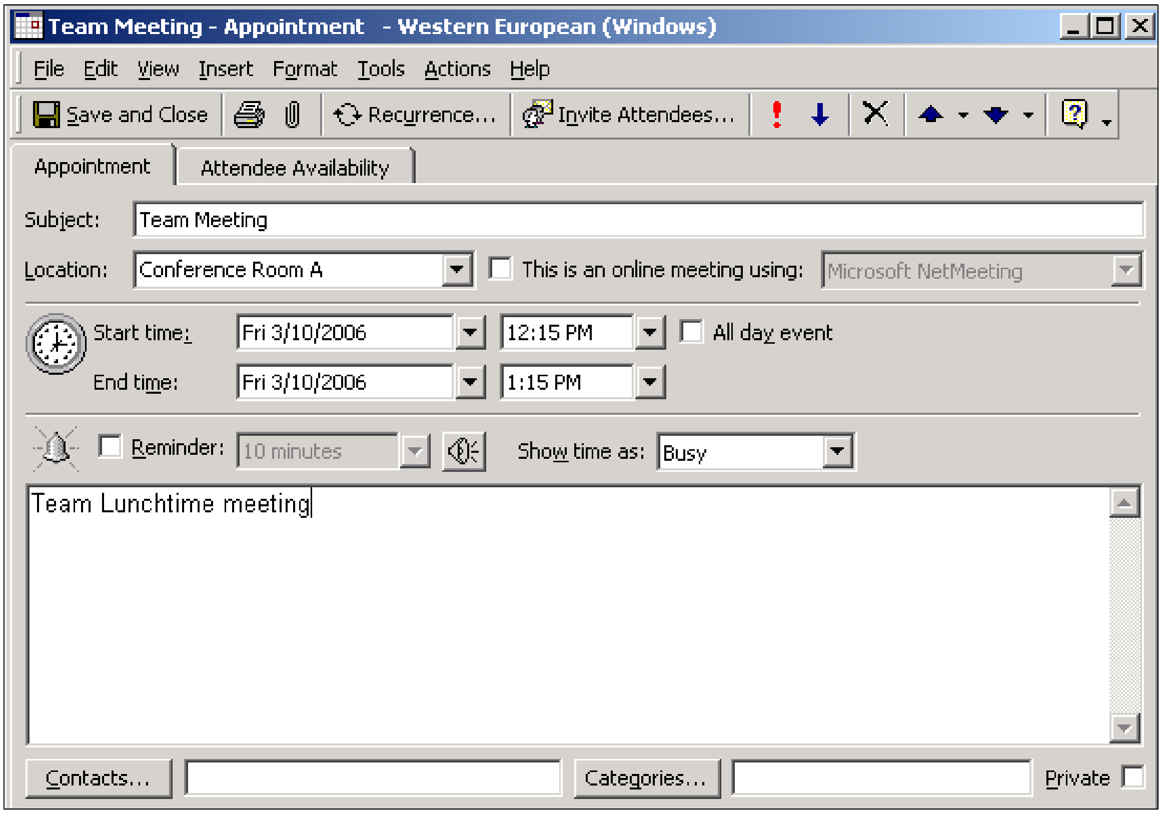
### Exporting an Event to a Personal Calendar

Depending on the options defined in the Installation Options page, the system can either create a calendar event that you can save to your personal default calendar application or it can send you an email with an attachment that enables you to add the event to your calendar. The remarks appear in the body of the calendar event and the title field is the subject of the calendar event.

To export an event to your personal calendar, click the Export link on the event view page.

**Image: Personal calendar entry generated from a PeopleSoft Interaction Hub calendar event**

The following example illustrates the Personal calendar entry generated from a PeopleSoft Interaction Hub calendar event which shows Team Meeting-Appointment-Western European(Windows)




## Search Community Calendars Page

Use the Search Community Calendars page (EPPCA_SEARCH) to search for events in calendars across all portals and sites.

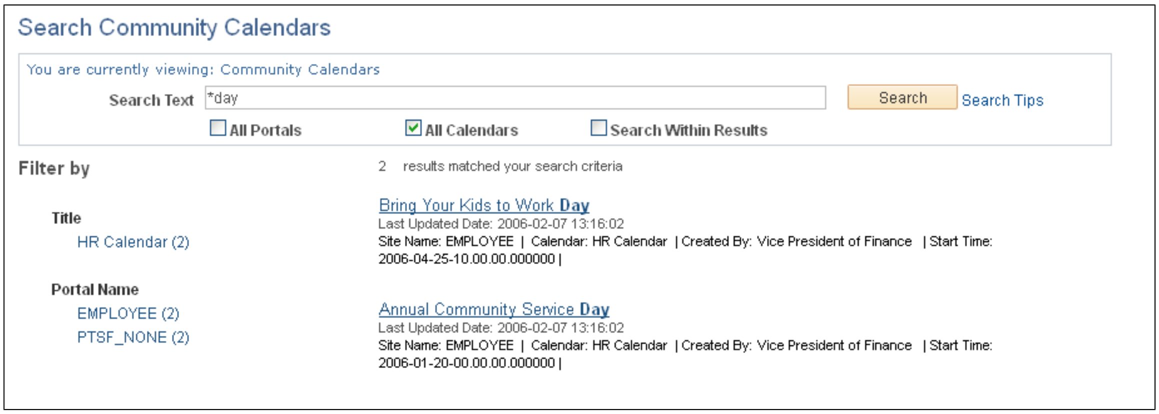
 

### Navigation

- Click the Search link on the My Community Calendars page.
- Click the Search link on the calendar homepage.

**Image: Search Community Calendars page**

This example illustrates the fields and controls on the Search Community Calendars page. You can find definitions for the fields and controls later on this page.




Use the Search Community Calendars page search your calendars for events to which you have access.

| | |
|---|---|
| **Search Text** | Enter the search criteria. |
| **Search Tips** | Click to display search syntax and examples on the Search Tips page. |
| **Search In** | *Current Calendar* — Select to search within the current calendar only.<br>*Current Site* — Select to search within all calendars of which you are a member in the current site.<br>*All Calendars and Sites* — Select to search within all calendars of which you are a member across all sites. |
| **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 Community Calendars** | Click to return to the originating page: calendar homepage, My Community Calendars page, or Community Calendars page. |

## Add/Remove Holiday Calendars Page

Use the Add/Remove Holiday Calendars page (EPPCA_HOLIDAY_SEL) to add or remove a holiday calendar to this calendar.

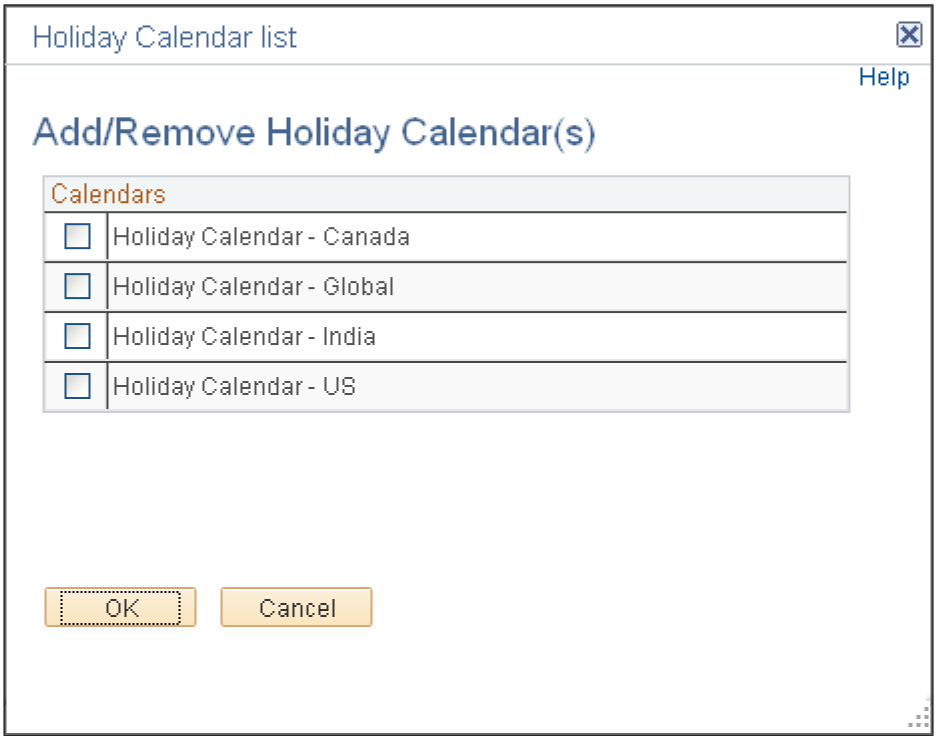
 

**Navigation**

Click the Add/Remove Holiday Calendar(s) link on the calendar's homepage.

**Image: Add/Remove Holiday Calendars page**

This example illustrates the fields and controls on the Add/Remove Holiday Calendars page.




Use the Add/Remove Holiday Calendars page to add or remove a holiday calendar to this calendar.

# Creating Calendar Events

This topic discusses how to define calendar events and recurring events.

Use the Define Recurrences page (EPPCA_RECUR_SEC) to set the recurrence for an event.

**Navigation**

Click Define Recurrence or View Recurrence link on the Event Details page.

## Pages Used to Create Calendar Events

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
| --- | --- | --- |
| Event Details Page | EPPCA_EVENT_EDIT | Add an event to a calendar or modify the details for an existing event. |
| Define Recurrences Page | EPPCA_RECUR_SEC | Set the recurrence for an event. |

## Event Details Page

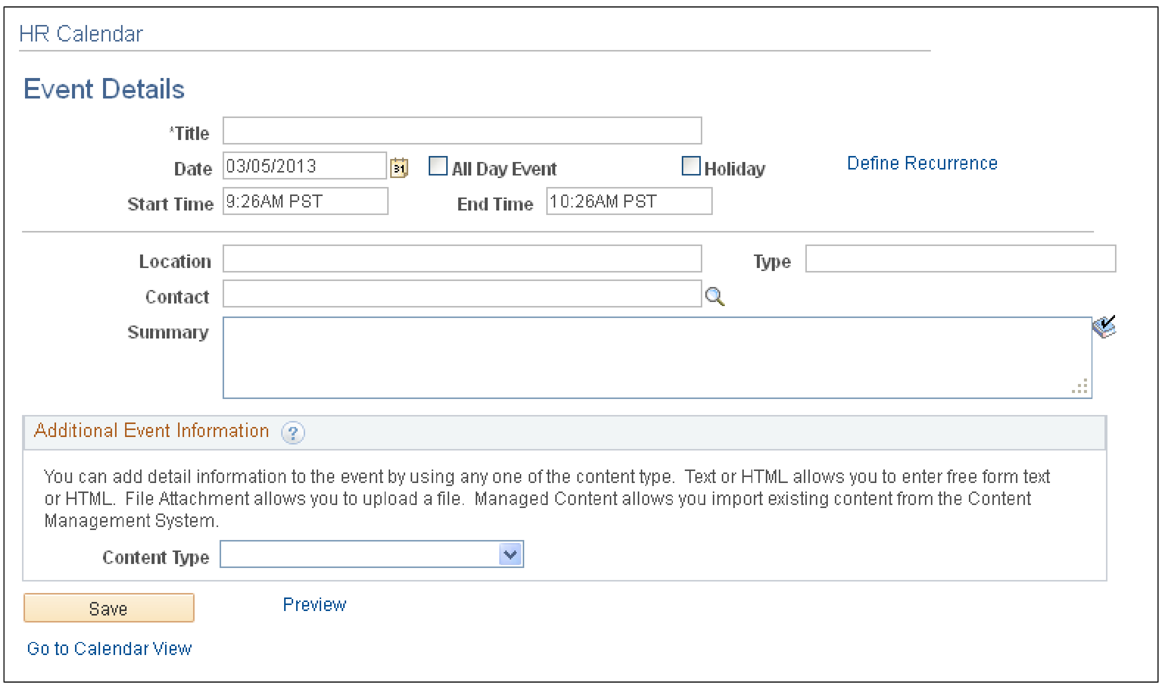
Use the Event Details page (EPPCA_EVENT_EDIT) to add an event to a calendar or modify the details for an existing event.

**Navigation**

- Click the Add Event button on a calendar homepage.
- Click the (+) link in the monthly view of a calendar homepage.
- Click the Add Event link in the monthly view of the My Events pagelet.
- Click the Edit Event link on the event view page.

**Image: Event Details page**

This example illustrates the fields and controls on the Event Details page. You can find definitions for the fields and controls later on this page.




Use the Event Details page to define the details for a calendar event.

| | |
|---|---|
| **Title** | Enter the title for the event. This text appears on the calendar to identify the event. |
| **Date** | Enter the date of the event. |
| **All Day Event** | Select this option to create an event that is identified as lasting the entire day. |
| **Holiday** | Select this option to create a holiday event. |
| **Define Recurrence or View Recurrence** | Select this link to access the Define Recurrences page that enables you to create repeating events. |

| | |
|---|---|
| **Start Time and End Time** | Set the start and end times for the event.<br><br>**Note:** The start time defaults to the current time; the end time defaults to one hour after the start time. |
| **Location** | Enter information about where the event will take place. This information is displayed in the weekly and daily views of the calendar and appears as tool tip text in the monthly view. |
| **Type** | Enter free-form text describing what type of event you are creating. |
| **Contact** | Select a user name for the contact person.<br><br>After you select the contact name, their profile name appears next to the fields. You can click the profile name to view the profile page. |
| **Summary** | Enter a summary of the event. |
| **Content Type** | You can add attachments or additional information to the event using the following options:<br><br>• *File Attachment* — Allows you to attach a file to the event.<br><br>Selecting this option enables the Upload File button.<br><br>• *Managed Content* — Allows you to import a piece of managed content from any portal providing it has been approved for publishing and its parent folder allows for publishing.<br><br>Selecting this option enables the Select Content button.<br><br>**Note:** Attaching a piece of content to an event is considered to be a form of publishing the content.<br><br>• *Text or HTML* enables you to use the text editor to enter plain text or HTML that appears on the Event Details page.<br><br>Selecting this option enables the rich text editor.<br><br>• *Web Site URL* enables you to add a URL that appears on the Event Details page.<br><br>Selecting this option enables URL field.<br><br>This additional content is accessible on the event view page. |
| **Notify** | Click to send a notification.<br><br>**Note:** The Notify link is enabled after you save the event. |

**Preview**

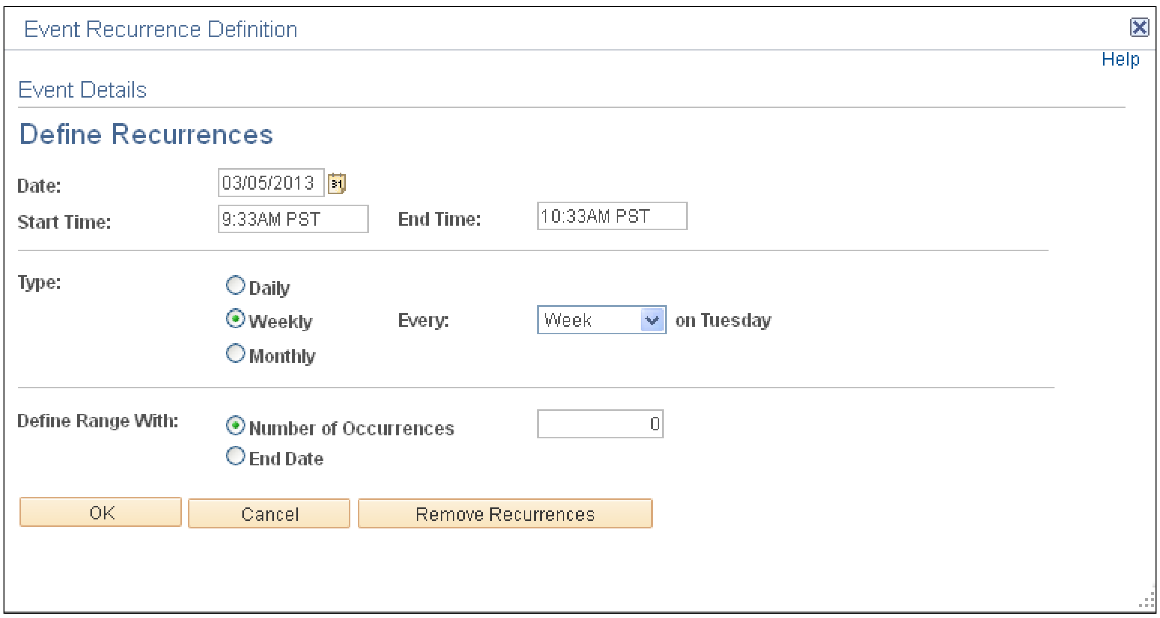
Click to display a preview of the event before it is published to the calendar.

## Define Recurrences Page

Access the Define Recurrences Page (click the Define Recurrence link or the View Recurrence link on the Event Details page).

**Image: Define Recurrences page**

This example illustrates the fields and controls on the Define Recurrences page. You can find definitions for the fields and controls later on this page.




Use the Define Recurrence page to define a series of repeating events over time.

**Date**

Select the date of the first occurrence of the event.

**Start Time and End Time**

Set the start and end times for the event.

**Type**

Enter the type of recurrence:

- Select *Daily* to set daily recurrence for every: *Day, 2 Days, 3 Days,* or *4 Days*.
- Select *Weekly* to set weekly recurrence. The date for the first occurrence determines the day of the week for the recurrence, which is displayed by the system. Recurrence can be set to every: *Week, 2 Weeks, 3 Weeks,* or *4 Weeks.*
- Select *Monthly* to set monthly recurrence. Recurrence can be set to the *1st,2nd,3rd, 4th,* or *5th* occurrence of a day of the week.

**Define Range With**

Select a method to define when the event stops repeating:

- Select *Number of Occurrences* to specify a number of times the event repeats.
- Select *End Date* to specify a date for the event to stop repeating.

**Remove Recurrences** Click to remove the entire series of recurring events from the calendar.

### Editing a Recurring Event

If you select to edit a recurring event, you are prompted to select either just one occurrence of the recurring event or all events in the series. If you select to edit just one occurrence in the series, the changes you make apply to this date only. You are able to view the Define Recurrence page, but not make any changes to the recurrences. Information attached to the event from the Additional Event Information group box can only be edited when updating the entire series of recurring events since the item is shared across the series of events.

If you choose to edit all events in the series, then all information related to the event is available for editing. The changes you make apply to the entire series of recurring events. To delete the recurring events, click View Recurrences and click Remove Recurrences on the Define Recurrences page.

# Using Calendar Alerts and Notifications

This topic discusses steps to subscribe and update calendar alerts and send event notifications.

## Pages Used with Calendar Alerts and Notifications

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| Add Alert Subscription Page | EPPAN_ALERTS | Subscribe to an email alert for a calendar or an event. |
| Update Alerts Subscription Page | EPPAN_ALERTS | Update an email alert for a calendar or an event. |
| Event Notification Page | EPPCA_EVENT_NOTIFY | Send email notifications to users associated with the calendar or the event. |

## Understanding Calendar Alerts and Notifications

You can create personal alert subscriptions at the calendar level and at the event level. In addition, any calendar member can send notifications to selected calendar members from any calendar event.

Prior to creating any alerts, calendar alerts must be enabled on the Alerts Setup page. In addition, for alerts to be delivered to subscribers, alert notifications need to be scheduled by the portal administrator.

### Related Links

"Setting Up Alerts" (PeopleSoft Interaction Hub 9.1: Portal and Site Administration)

"Scheduling Alert Notifications" (PeopleSoft Interaction Hub 9.1: Portal and Site Administration)

## Add Alert Subscription Page

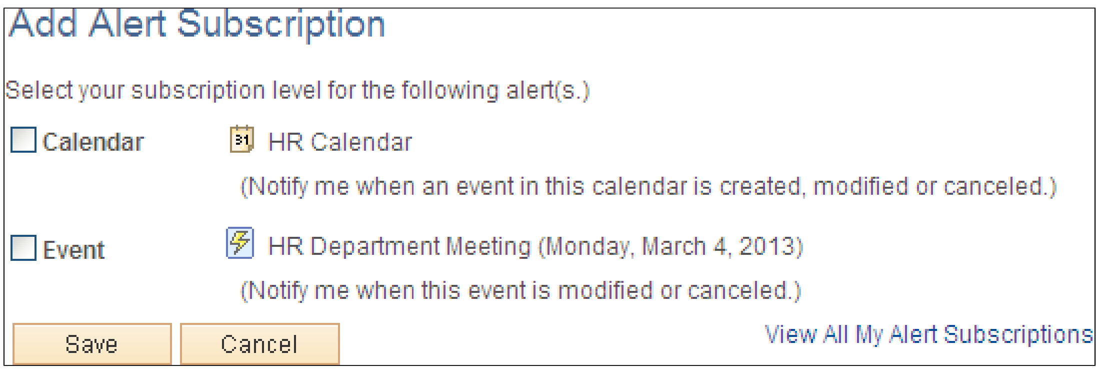
Use the Add Alert Subscription page (EPPAN_ALERTS) to subscribe to an email alert for a calendar or an event.

**Navigation**

- Click the Alerts link on the calendar homepage.
- Click the Alerts link on the event view page.
- Click the Alerts link on the Community Calendar page when viewing a specific calendar.

**Image: Add Alert Subscription page (event level view)**

This example illustrates the fields and controls on the Add Alert Subscription page (event level view). You can find definitions for the fields and controls later on this page.




Use the Add Alert Subscription page to create subscriptions for email alerts for the calendar.

**Calendar**

Select this option to subscribe to an email alert at the calendar level.

When selected, you will receive an email update when the date, time, or location fields in any existing event in the calendar are modified or when an event is created or canceled.

**Event**

Select this option to subscribe to an email alert at the discussion topic level.

When selected, you will receive an email update when the specific event is modified or canceled. If the event is a recurring event, you can only subscribe to alerts for one date in the series using this page. To subscribe to more than one event in the series, you must open each event and subscribe to it individually.

**Note:** This option is available only when accessing this page from the event view page.

| | |
|---|---|
| **View All My Alert Subscriptions** | Click to view the My Alerts page. |

### Related Links

Maintaining Alert Subscriptions

## Update Alerts Subscription Page

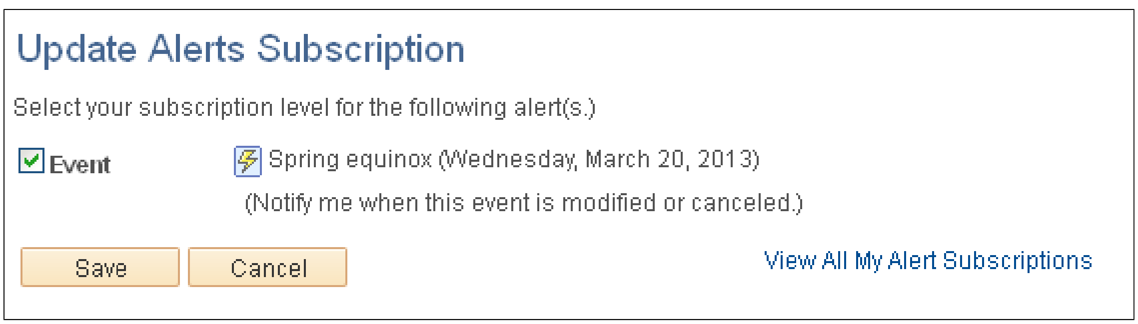
Use the Update Alerts Subscription page (EPPAN_ALERTS) to update existing alert subscriptions for the discussion forum.

**Navigation**

- Click the Alerts link on the discussion forum homepage.
- Click the Alerts link on the Post Details page.
- Click the Update Subscriptions link on the Create New Topic page.
- Click the Update Subscriptions link on the Add a Reply page.
- Click the Update Subscriptions link on the Discussion page.

**Image: Update Alerts Subscription page (event level view)**

This example illustrates the fields and controls on the Update Alerts Subscription page (event level view). You can find definitions for the fields and controls later on this page.




Use the Update Alerts Subscription page to update subscriptions for email alerts for the calendar.

| | |
|---|---|
| **Calendar** | Select this option to subscribe to an email alert at the calendar level. |
| **Event** | Select this option to subscribe to an email alert at the discussion topic level.<br><br>**Note:** This option is available only when accessing this page from the event view page. |
| **View All My Alert Subscriptions** | Click to view the My Alerts page. |

### Related Links

Maintaining Alert Subscriptions

## Event Notification Page

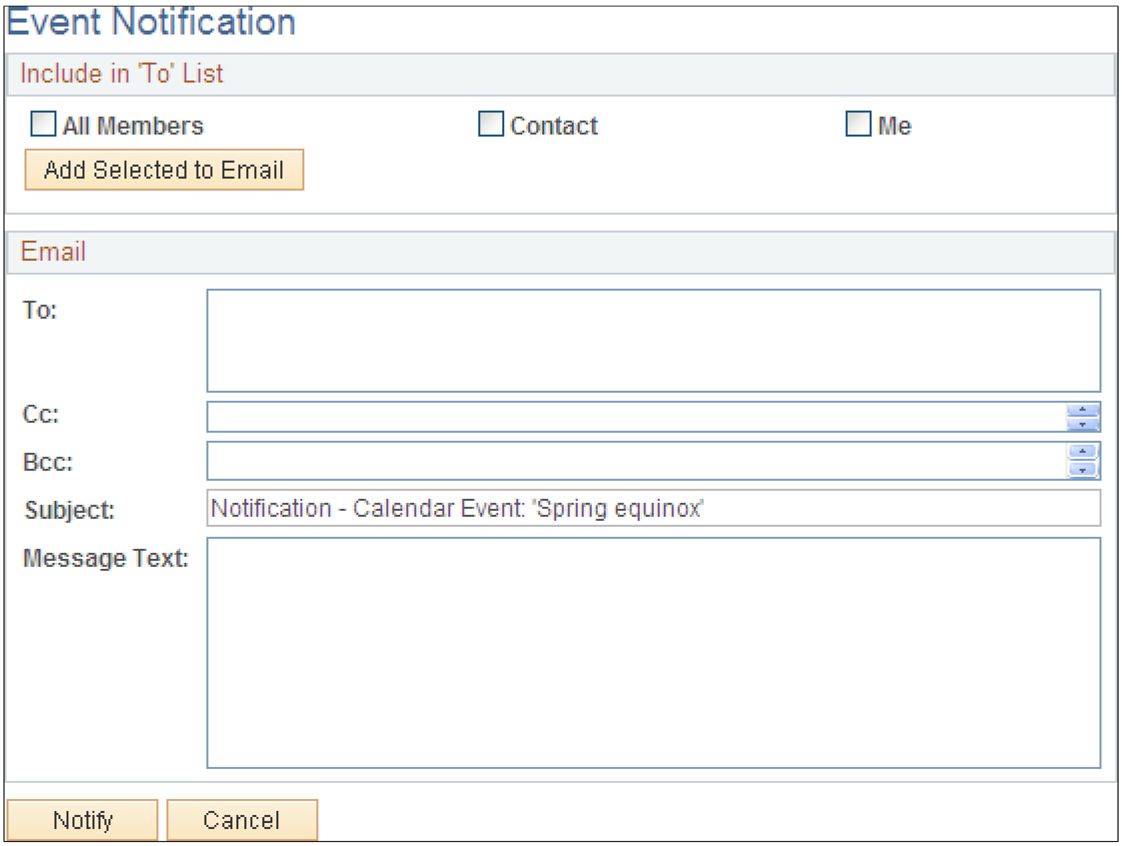
Use the Event Notification page (EPPCA_EVENT_NOTIFY) to send email notifications to users associated with the calendar or the event.

**Navigation**

Click the Notify link on the Event Details page.

**Image: Event Notification page**

This example illustrates the fields and controls on the Event Notification page. You can find definitions for the fields and controls later on this page.




Use the Event Notification page to send email notifications to users associated with the calendar or the event.

### Include in 'To' List

Select the people you want to receive the notification. Selecting any of these options populates the *To* field with the corresponding users from the calendar. Additionally, you can manually enter email addresses in the *To:* field.

**Note:** Addresses for the Cc: and Bcc: fields must be manually entered or copied and pasted from the To: field.

| | |
|---|---|
| **All Members** | Sends the notification to all members of the calendar. |

| | |
|---|---|
| **Contact** | Sends the notification to the contact for the event. |
| **Me** | Sends the notification to you. |
| **Add Selected to Email** | Populates the *To* field with email addresses of those people you have selected to receive the notification. |

### Email

Use this section of the page to enter additional address information as well as the text of the notification. The system displays the title of the event as the subject of the notification.

| | |
|---|---|
| **To, Cc, or Bcc** | Manually enter additional email addresses in these fields. |
| **Subject** | Enter a subject for the email. A default subject is generated by the system. |
| **Message** | Enter the text of the message in this text box. The text appears in the email message along with a URL to the Event Detail page. |
| **Send** | Click to send the email notification. |

# Working With the My Events Pagelet

This topic discusses personalizing and using My Events pagelet.

## Page Used to Personalize the My Events Pagelet

| *Page Name* | *Definition Name* | *Usage* |
|---|---|---|
| Personalize My Calendar Events Page | EPPCA_CALPGLT_PREF | Select the calendar or calendars to be displayed in the pagelet and specify the view (daily, weekly, or monthly). |

## Personalize My Calendar Events Page

Use the Personalize My Calendar Events page (EPPCA_CALPGLT_PREF) to select the calendar or calendars to be displayed in the pagelet and specify the view (daily, weekly, or monthly).

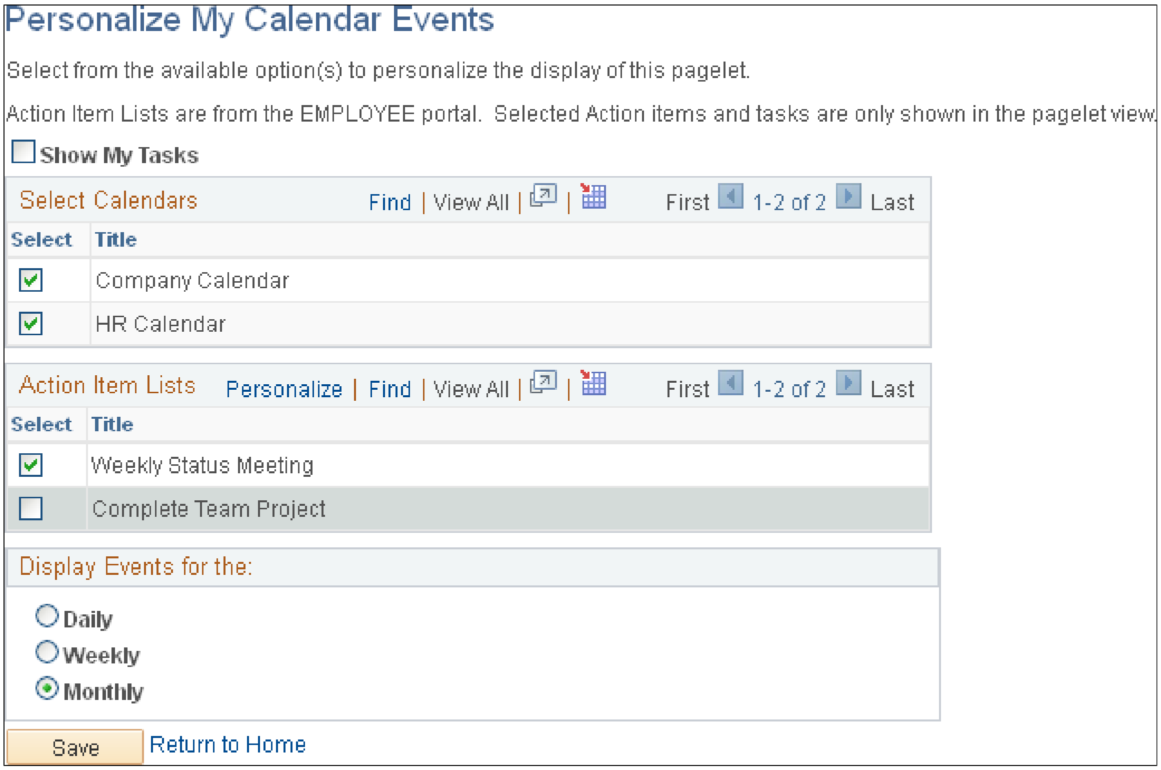
 

### Navigation

Click the Customize My Events button in the My Events pagelet.

**Image: Personalize My Calendar Events page**

The following example illustrates the Personalize My Calendar Events page. Access the Personalize My Calendar Events Page (click the Customize My Events button in the My Events pagelet) as shown below.




Use the Personalize My Calendar Events page to select the calendar or calendars to be displayed in the pagelet and specify the period (daily, weekly, or monthly).

**Show My Tasks**

Select this option to display your tasks in the My Events pagelet.

**Select Calendars**

Select events from which calendar or calendars are displayed in the My Events pagelet.

**Action Item Lists**

Select action item from action item lists to be displayed in the My Events pagelet.

**Display Events for the**

Select the period to be displayed in the My Events pagelet.

---

**Note:** This period determines the default period to be used on the Community Calendars page.

---

## My Events Pagelet

**Image: My Events pagelet (weekly view)**

The following example illustrates the My Events pagelet (weekly view). Access the My Events pagelet on the portal homepage.


Use the My Events pagelet to display calendar events from one or more calendars of which you are a member. The My Events pagelet displays what is also known as a *unified calendar* because events can appear from calendars across all portals and sites. In addition, the My Events pagelet can display your tasks and action items from selected action item lists.

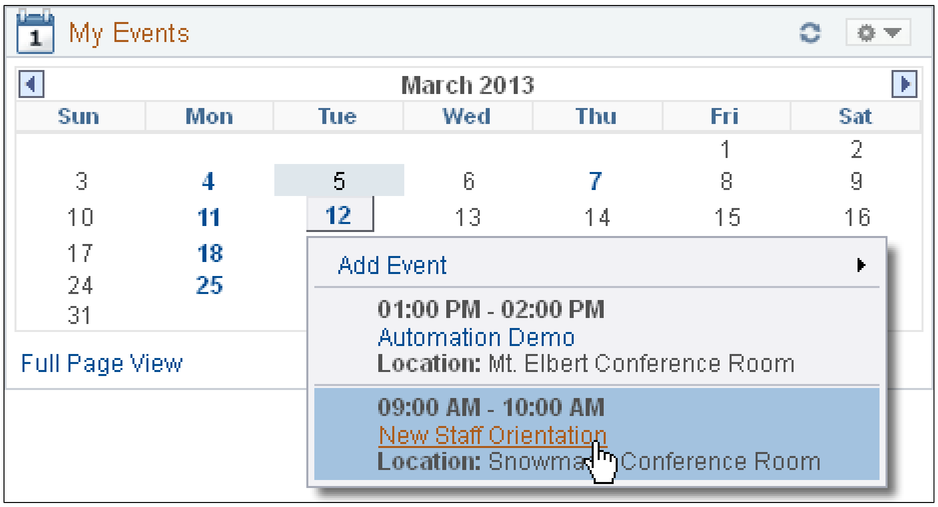
| | |
|---|---|
|  | Click to access the Personalize My Calendar Events page. |
|  | Click the Previous button to view the calendar for the previous period (day, week, or month). |
|  | Click the Next button to view the calendar for the next period ( day, week, or month). |
| | Indicates a recurring event. |
| | Indicates an all-day event. |
| <#> | Click a bold date to view a pop-up list of events scheduled on that date. In this pop-up list, you can select to view detailed event information or to add an event to one of the calendars personalized to display in the pagelet.<br><br>**Note:** This feature is available from the monthly view only. |
| **<Item Title>** | Click an item title to access the details page for that event, action item, or task.<br><br>**Note:** This feature is available directly from the daily and weekly views, and from the pop-up list of the monthly view. |
| **Full Page View** | Click to access the Community Calendars page that enables you to view events from all of your calendars. |

**Note:** This period displayed in the My Events pagelet determines the default period displayed on the Community Calendars page. The default scope is *all* calendars.

## Viewing the Event Pop-up List

**Image: My Events pagelet pop-up list**

The following example illustrates the My Events pagelet pop-up list. To view the event pop-up list, click a bold date in the monthly view of the My Events pagelet as shown in this example:




From the event pop-up list, you can access the details page for a listed event, action item, or task; or add an event to any of the personalized calendars.

 Indicates a personal task.

 Indicates an action item.

**<Item Title>** Click an item title to access the details page for that event, action item, or task.

## Adding an Event from the Event Pop-up List

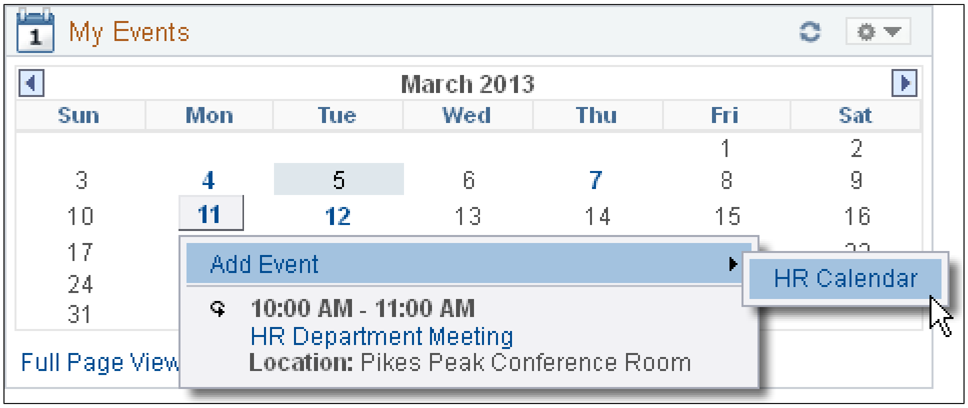
To add an event from the My Events pagelet:

1. Click a bold date in the monthly view of the My Events pagelet.

2. Click the Add Event link in the pop-up list as shown in this example:

   **Image: Clicking the Add Event link in the event pop-up list**

   The following example illustrates the Clicking the Add Event link in the event pop-up list.




3. Select one of the calendars listed to add an event to that calendar.

---

**Note:** Only the calendars selected to display in the pagelet on the Personalize My Calendar Events page are listed.

---

See Creating Calendar Events.

# Administering Community Calendars

This topic discusses administering community calendars and modifying privileges for them.

## Pages Used to Administer Community Calendars

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| Administer Community Calendars Page | EPPCA_INQUIRY | Manage calendars. |
| Administer Community Calendars - Calendar Security Page | EPPCA_CAL_MEM | Assign members and privileges to calendars. |

## Administer Community Calendars Page

Use the Administer Community Calendars page (EPPCA_INQUIRY) to manage calendars.

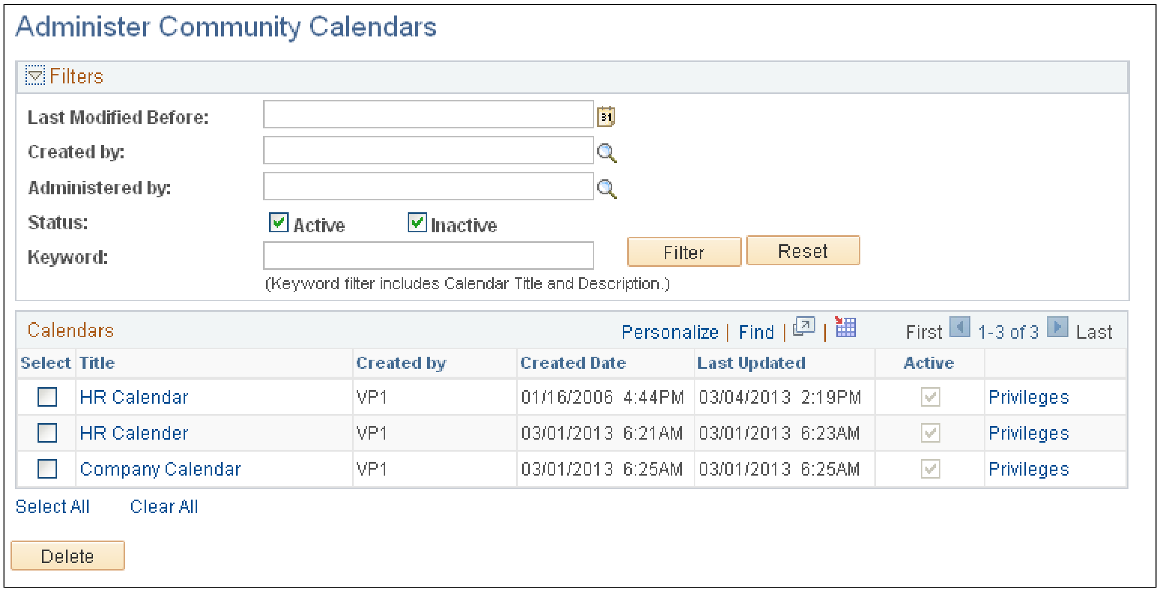
 

**Navigation**

Portal Administration, Administer Calendars

**Image: Administer Community Calendars page**

The following example illustrates the Administer Community Calendars page. Access the Administer Community Calendars page (Portal Administration, Administer Calendars) as shown below.




Use the Administer Community Calendars page to manage calendars and member privileges.

| | |
|---|---|
| **Last Modified Before** | Select a date to find calendars that were modified before the date you specify. |
| **Created By** | Select a user ID to return all calendars that the user has created. |
| **Administered By** | Select a user ID to return all calendars for which the specified user is an administrator. |
| **Status** | Select to search for active or inactive calendars, or both. |
| **Keyword** | Enter keywords used in the title and description of the calendar. |
| **Filter** | Click to filter the list of calendars. |
| **Reset** | Click to clear the filter criteria. |
| **Select** | Select a specific calendar. |
| **Title** | Click the title of the calendar to access the calendar homepage. |
| **Privileges** | Click the Privileges link to access the Administer Community Calendars - Calendar Security page. |
| **Select All or Clear All** | Click a link to select or clear the selection of all calendars. |
| **Delete** | Click to delete the selected calendar or calendars. |

## Administer Community Calendars - Calendar Security Page

Use the Administer Community Calendars - Calendar Security page (EPPCA_CAL_MEM) to assign members and privileges to calendars.

**Navigation**

Click the Privileges link on the Administer Community Calendars page.

**Image: Calendar Security page**

The following example illustrates the Administer Community Calendars - Calendar Security page. Access the Administer Community Calendars - Calendar Security page (click the Privileges link on the Administer Community Calendars page) as shown below.


Use the Administer Community Calendars - Calendar Security page to assign list members and privileges similar to the Calendar Security page.

See Calendar Security Page.

---

# Publishing a Calendar as a Pagelet

This section discusses how to:

- Publish a pagelet from a calendar.
- Publish a calendar from Pagelet Wizard.
- Edit a published pagelet.
- Publish a pagelet to multiple portals.

## Pages Used to Publish Calendars as Pagelets

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| Calendar Properties - Publish Pagelet Wizard Definition Page | EPPPB_PGLT_PUB | Create a pagelet definition for a calendar. |

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| Pagelet Wizard - Specify Pagelet Information Page | PTPPB_WIZ_INFO | Provide information to identify and categorize a pagelet.<br><br>See Publishing a Calendar from Pagelet Wizard. |
| Pagelet Wizard - Select Data Source Page | PTPPB_WIZ_DATASRC | Select the type of data source for the pagelet.<br><br>See Publishing a Calendar from Pagelet Wizard. |
| Pagelet Wizard - Specify Data Source Parameters Page | PTPPB_WIZ_DATAPRMS | Configure the data source parameters that are required for data to be displayed in the pagelet.<br><br>This page is accessible only when you are building a pagelet with a data source that allows modification of associated parameters.<br><br>See Publishing a Calendar from Pagelet Wizard. |
| Pagelet Wizard - Specify Data Source Parameter Values Page | PTPPB_WIZ_PRMVALS | Specify prompt values for the end user to select from when personalizing the pagelet.<br><br>This page is accessible only for data source parameters for which you have selected the *User Specified* or *Admin Specified* usage types.<br><br>See Publishing a Calendar from Pagelet Wizard |
| Pagelet Wizard - Select Display Format Page | PTPPB_WIZ_DISPFRMT | Specify the data transformation method and display format for the pagelet.<br><br>See Publishing a Calendar from Pagelet Wizard. |
| Pagelet Wizard - Specify Display Options Page | PTPPB_WIZ_DISP_CUS | Enter the custom formatting details for the pagelet as well as header and footer options. Preview the pagelet.<br><br>See Publishing a Calendar from Pagelet Wizard. |
| Pagelet Wizard - Specify Publishing Options Page | PTPPB_WIZ_PUBOPT | Specify the manner in which the pagelet is published. Provide registration, caching, and security details, and register the pagelet.<br><br>See Publishing a Calendar from Pagelet Wizard. |

| *Page Name* | *Definition Name* | *Usage* |
|---|---|---|
| Pagelet Wizard - Pagelet Creation Confirmed Page | PTPPB_WIZ_FINISH | Confirm that the creation of the pagelet is complete.<br><br>See Publishing a Calendar from Pagelet Wizard. |
| Calendar Properties - Publish as Pagelet Page | EPPPB_PGLT_LST | Administer pagelet definitions for a calendar. |
| Publish to Multiple Portals Page | PTPP_PMPUBPRTL | Publish the pagelet definition to additional portals and sites.<br><br>Publish multiple pagelet definitions to another portal or site. |

## Calendar Properties - Publish Pagelet Wizard Definition Page

Use the Calendar Properties - Publish Pagelet Wizard Definition page (EPPPB_PGLT_PUB) to create a pagelet definition for a calendar.

**Navigation**

- My Content, My Community Calendars

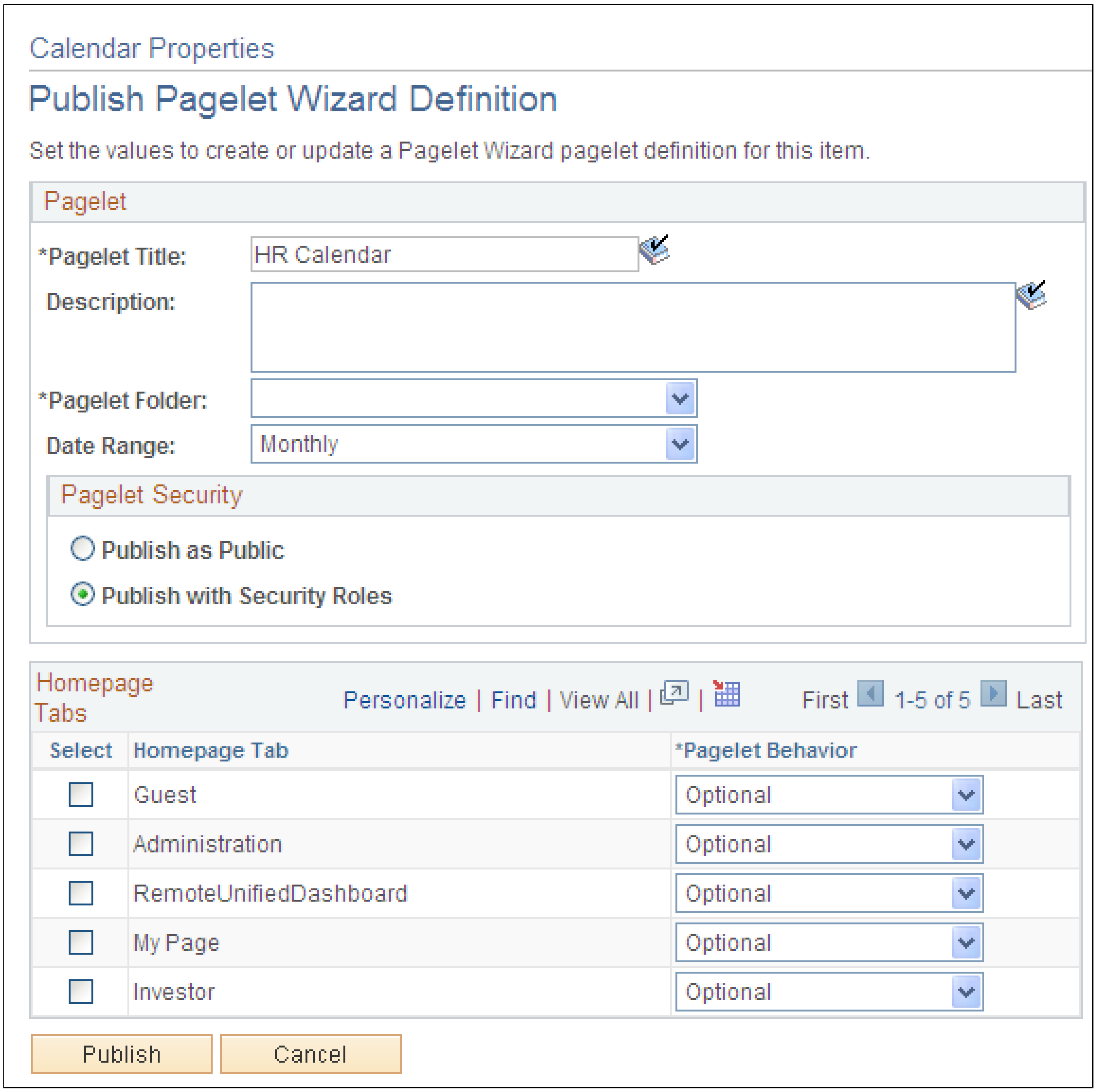
  Click the Properties link for the calendar on the My Community Calendars page.

  Click the Publish as Pagelet link on the Calendar Properties page.

- Click the Add Pagelet button or the Edit button on the Calendar Properties - Publish as Pagelet page.

**Image: Calendar Properties - Publish Pagelet Wizard Definition Page**

The following example illustrates the Calendar Properties - Publish Pagelet Wizard Definition page.




Use the Calendar Properties - Publish Pagelet Wizard Definition page to create a pagelet definition for a calendar.

### Pagelet

The pagelet title and description from the Calendar Properties page appear in the Pagelet group box. You can edit these two fields, if necessary.

**Pagelet Title**

Displays the title for the calendar, which can be edited as the title for the pagelet.

**Description**

Displays the description for the calendar, which can be edited as the description for the pagelet.

**Pagelet Folder**

Select a folder to publish to. Only folders from the current site are available to select.

**Pagelet Security**

Select the security options for viewing the pagelet. Available options are:

*Publish as Public*, which enables all users to view the pagelet.

*Publish with Security Roles*, which uses the roles defined on the Calendar Security page when publishing the pagelet.

**Note:** If there are no roles defined on the Calendar Security page, the system automatically selects to publish the pagelet as public.

### Homepage Tabs

Use this group box to define the homepage tab labels and behavior for the pagelet.

**Homepage Tab**

Select the tabs that will display the pagelet.

**Pagelet Behavior**

Select the behavior options for the pagelet.

*Optional*. The pagelet will not automatically appear on the homepage. However, it is available for selection when users personalize their homepages. This setting should not be used for guest homepage pagelets because guest users do not have personalization privileges.

*Optional-Default*. The pagelet will appear on all user homepages if they have access to the pagelet. The pagelet can be removed when users personalize their homepages. This setting should not be used for guest homepage pagelets because guest users do not have personalization privileges.

*Required-Fixed*. The pagelet will appear on all user homepages if they have access to the pagelet. The placement of the pagelet cannot be changed and the pagelet cannot be removed from the homepage.

*Required*. The pagelet will appear on all user homepages if they have access to the pagelet. The placement of the pagelet can be changed, but it cannot be removed from the homepage.

**Publish** Click the Publish button to publish this pagelet and display the Calendar Properties - Publish as Pagelet page, on which you can review or edit the pagelet definition

## Publishing a Calendar from Pagelet Wizard

Pagelets for calendars can be created and published using Pagelet Wizard and then managed from the Calendar Properties page. This section provides an overview of how to use Pagelet Wizard to complete the following six steps:

- Step 1: Entering Pagelet Identifying Information.
- Step 2: Selecting a Pagelet Data Source.
- Step 3: Specifying Data Source Parameters.

  Step 3 also includes "Specifying Prompt Values for Data Source Parameters."
- Step 4: Selecting a Pagelet Display Format.
- Step 5: Specifying Pagelet Display Options.
- Step 6: Specifying Pagelet Publication Options.

---

**Note:** If you access Pagelet Wizard from the Go to Pagelet Wizard link, you will be modifying an existing pagelet definition. If you want to create a new pagelet definition, start from the Portal Administration or PeopleTools navigation path.

---

Where appropriate, this section provides details specific to using Pagelet Wizard to publish a calendar as a pagelet. The PeopleTools 8.53 PeopleBooks provide detailed information on using Pagelet Wizard.

See the product documentation for *PeopleTools: Portal Technology*, "Using Pagelet Wizard to Create and Manage Pagelets."

### Step 1: Entering Pagelet Identifying Information

Access the Pagelet Wizard - Specify Pagelet Information page (click the Go to Pagelet Wizard link on the Calendar Properties - Publish Pagelet Wizard Definition page; or Portal Administration, Pagelets, Pagelet Wizard, Pagelet Wizard).

Use the Pagelet Wizard - Specify Pagelet Information page to identify and categorize a pagelet.

See the product documentation for *PeopleTools: Portal Technology*, "Using Pagelet Wizard to Create and Manage Pagelets," Step 1: Entering Pagelet Identifying Information.

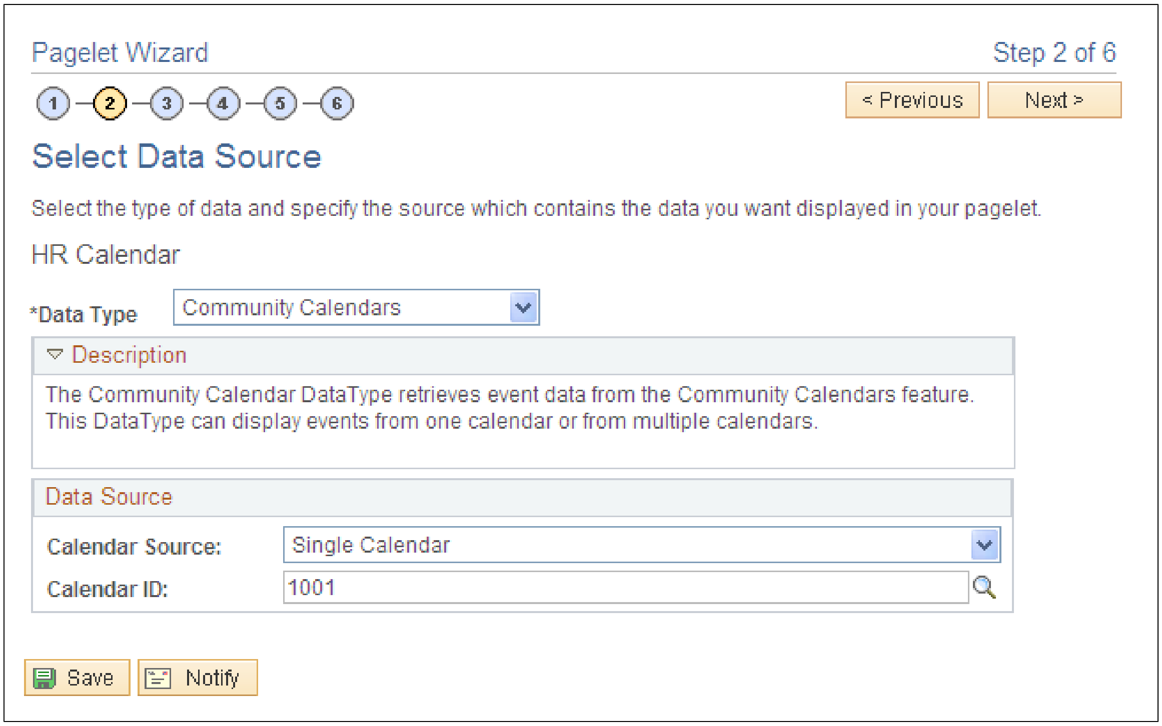
 

## Step 2: Selecting a Pagelet Data Source

Access the Pagelet Wizard - Select Data Source page (click the Next button on the Pagelet Wizard - Specify Pagelet Information page).

**Image: Pagelet Wizard - Select Data Source page (community calendars data type)**

The following example illustrates the Pagelet Wizard - Select Data Source page (community calendars data type).




Use the Pagelet Wizard - Select Data Source page to select the Pagelet Wizard data source type.

**Data Type**

For calendars, select *Community Calendars.*

**Calendar Source**

Select the type calendar to display in the pagelet: *All Calendars* or *Single Calendar.* Selecting *All Calendars* creates a pagelet similar to the delivered My Events pagelet.

**Note:** The *Workspace Calendar* option is for internal use.

**Calendar ID**

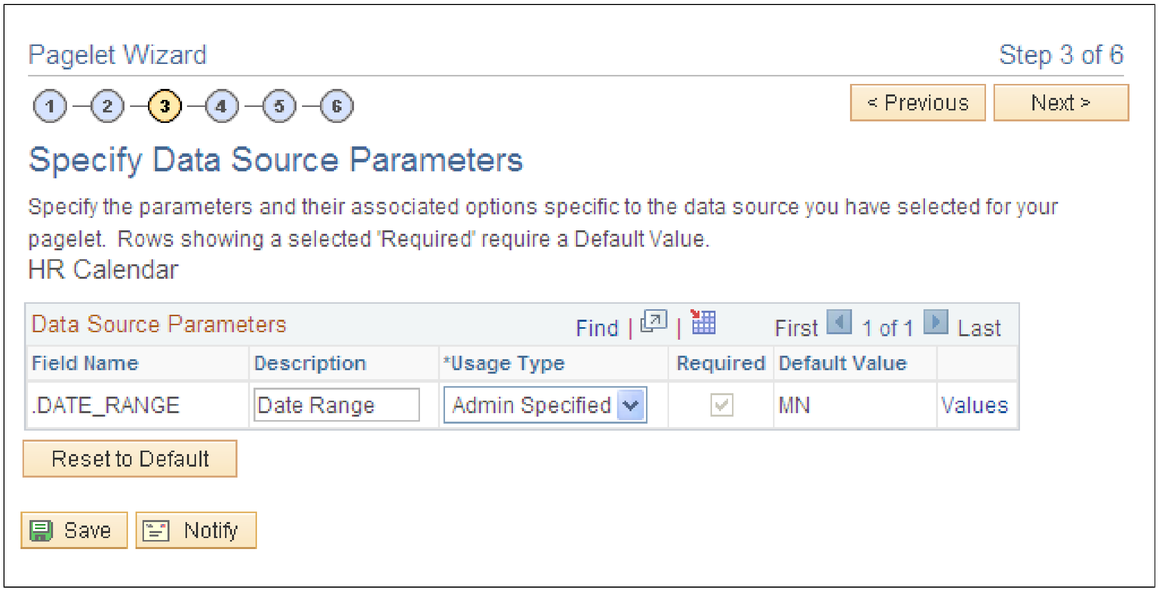
Select the calendar to display in the pagelet.

## Step 3: Specifying Data Source Parameters

Access the Pagelet Wizard - Specify Data Source Parameters page (select *Community Calendars* as the data type on the Pagelet Wizard - Select Data Source page, then click the Next button).

**Image: Pagelet Wizard - Specify Data Source Parameters page (community calendars data source)**

The following example illustrates the Pagelet Wizard - Specify Data Source Parameters page (community calendars data source).




Use the Pagelet Wizard - Specify Data Source Parameters page to configure the data source parameters that are required for data to be displayed in the pagelet.

---

**Note:** This page is accessible only when you are building a pagelet with a data source that allows modification of associated parameters.

---

**Field Name**

Displays the name of the data source parameter.

For calendars, the following data source parameters can be defined:

DATERANGE — Specifies the scope of the calendar: daily, weekly, or monthly.

**Description**

Displays a description of the data source parameter.

**Usage Type**

Select the type of accessibility that you want to grant for the data source parameter when it appears in the pagelet. Options are:

- *Admin Specified:* Select to enable those users with administrative privileges to specify variables for this field, as well as access the Configure link on the published pagelet and select from those parameters for users.
- *Context Sensitive:* Select to enable Context Manager to specify a data source parameter value for this field.

- *Fixed:* Select to enter a fixed value for the data source parameter that the end user cannot modify.
- *System Variable:* Select to assign a system variable as the data source parameter value. The value of the system variable is automatically inserted into the parameter when the pagelet appears. When you select this option, the pagelet end user cannot modify the data source parameter.

  For example, suppose that you specify *%UserId* as the system variable for a parameter name User. When the pagelet appears on a user's homepage, the User field is populated by the *%UserId* system variable, which is the user ID used to access the pagelet.
- *User Specified:* Select to enable end users to specify a data source parameter value for this field. When a pagelet contains a user-specified parameter, the Customize button appears on the pagelet title bar.

  End users can click this button to access a personalization page, on which they can select a data source parameter value that they want to use for the pagelet. Uers can select a value from a prompt, or they can manually enter their own value if no prompt values are available.

  If you change the usage type from or to *User Specified* for a data source parameter on a published homepage pagelet, you must unpublish and then republish the pagelet.

**Required**

This check box is selected and disabled for parameters specified as administrator-specified, context-sensitive, fixed, and system variable; otherwise, it is selected but enabled for user-specified parameters.

**Default Value**

You can enter a value that includes the % and * wildcards at the beginning or end of a value in the Default Value field.

Note the following about default values:

- If you select *User Specified* as the usage type and the data source parameter is a required value, you must enter the default value that should appear before a user enters a value. If the data source parameter is not a required value, you do not have to enter a default value.

  If you select a default value when defining prompt values on the Pagelet Wizard - Specify Data Source Parameter Values page, that default value populates this field.

  If you select *User Specified* as the usage type, you can also enter a system variable as the default value. For example, to make the current date the default value for a user-specified parameter, enter a default value of *%Date.*

- If you select *System Variable* as the usage type, you must enter a system variable to use as the data source parameter value. You can use the Look up Value button to access a list of valid system variables.

  See the product documentation for *PeopleTools: Portal Technology*, "Using Pagelet Wizard to Create and Manage Pagelets," Step 3: Specifying Pagelet Data Source Parameters, Understanding System Variables Supported as Data Source Parameters.

- If you select *Fixed* as the usage type, you must enter the fixed value.

**Values**

If you select *User Specified* or *Admin Specified* as the usage type, click Values to access the Pagelet Wizard - Specify Data Source Parameter Values page.

**Text**

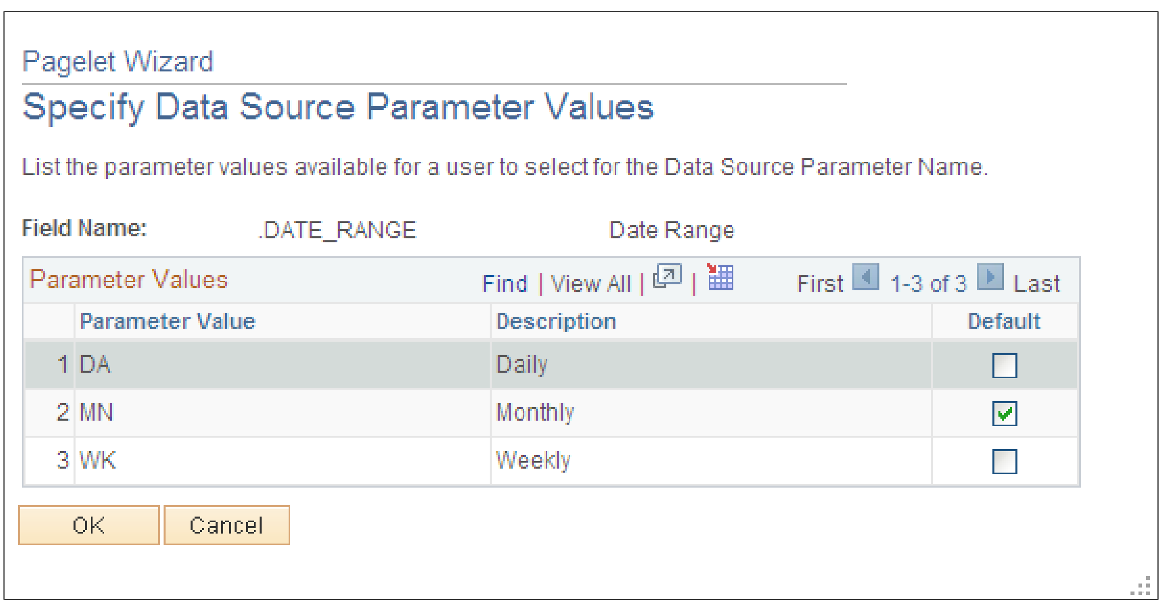
Use the Personalization Instructions group box to enter custom personalization instructions for the pagelet. These personalization instructions appear on the personalization page of the pagelet.

**Note:** Personalization instructions must be translatable.

## Specifying Prompt Values for Data Source Parameters

**Image: Specify Data Source Parameter Values page (community calendars data type)**

The following example illustrates the Specify Data Source Parameter Values page (community calendars data type). Access the Pagelet Wizard - Specify Data Source Parameter Values page (click the Values link on the Pagelet Wizard - Specify Data Source Parameters page) as shown below.



Use the Pagelet Wizard - Specify Data Source Parameter Values page to specify the prompt values, which are displayed to users when they personalize the pagelet. In addition, specify the default value for the parameter.

| | |
|---|---|
| **Parameter Value** | Specify the parameter value. |
| **Description** | Provide an optional description of the parameter value. |
| **Default** | Select one value as the default value. If the parameter is required, then a default value is required; otherwise, it is optional. |

## Step 4: Selecting a Pagelet Display Format

Access the Pagelet Wizard - Select Display Format page (click the Next button on the Pagelet Wizard - Specify Data Source Parameters page).

Use the Pagelet Wizard - Select Display Format page to specify the data transformation method and display format for the pagelet.

See the product documentation for *PeopleTools: Portal Technology*, “Using Pagelet Wizard to Create and Manage Pagelets,” Step 4: Selecting a Pagelet Display Format.

## Step 5: Specifying Pagelet Display Options

Access the Pagelet Wizard - Specify Display Options page (select *Custom* as the display format and click the Next button on the Pagelet Wizard - Select Display Format page}.

Use the Pagelet Wizard - Specify Display Options page to enter the custom formatting details for the pagelet as well as header and footer options, and to preview the pagelet.

---

**Note:** If you are modifying an existing pagelet definition or if you modify data source parameter definitions, you might need to reselect the XSL template, regenerate the XSL, or both to have the modified pagelet display actual data.

---

See the product documentation for *PeopleTools: Portal Technology*, “Using Pagelet Wizard to Create and Manage Pagelets,” Step 5: Specifying Pagelet Display Options.

## Step 6: Specifying Pagelet Publication Options

Use the Pagelet Wizard - Specify Publishing Options page (PTPPB_WIZ_PUBOPT) to specify the manner in which the pagelet is published.

Provide registration, caching, and security details, and register the pagelet.

**Navigation**

- Click the Next button on the Pagelet Wizard - Specify Display Options page.
- Click the Register Pagelet icon from any page in the wizard.

Use the Pagelet Wizard - Specify Publishing Options page to specify the type of pagelet that you want to publish. In addition, provide registration, caching, and security details, and register the pagelet.

See the product documentation for *PeopleTools: Portal Technology*, “Using Pagelet Wizard to Create and Manage Pagelets,” Step 6: Specifying Pagelet Publication Options.

## Calendar Properties - Publish as Pagelet Page

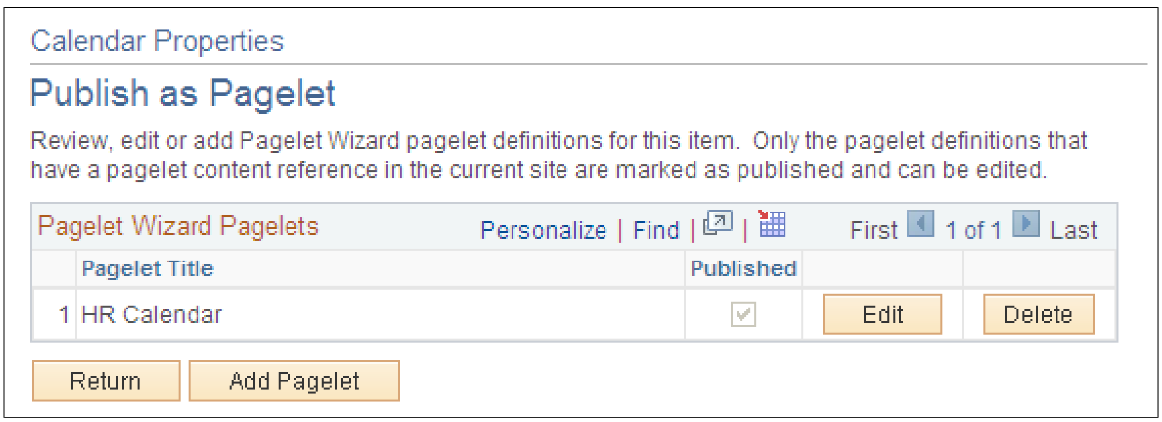
Use the Calendar Properties - Publish as Pagelet page (EPPPB_PGLT_LST) to administer pagelet definitions for a calendar.

**Navigation**

- Click the Publish button on the Calendar Properties - Publish Pagelet Wizard Definition page.
- If this calendar has already been published as a pagelet, click the Publish as Pagelet link on the Calendar Properties page.

**Image: Calendar Properties - Publish as Pagelet page**

The following example illustrates the Calendar Properties - Publish as Pagelet page. Access the Calendar Properties - Publish as Pagelet Page (click the Publish button on the Calendar Properties - Publish Pagelet Wizard Definition page; or if this calendar has already been published as a pagelet, click the Publish as Pagelet link on the Calendar Properties page).




Use the Calendar Properties - Publish as Pagelet page to review, edit, or add Pagelet Wizard pagelet definitions for this calendar. To edit a pagelet definition, it must be marked as published and have a content reference in the current site.

**Note:** Pagelets for this calendar published directly from Pagelet Wizard also appear in this list.

| | |
|---|---|
| **Edit** | Displays the Calendar Properties - Publish Pagelet Wizard Definition page on which you can make changes to the pagelet definition. |
| **Delete** | Deletes this pagelet definition and the published pagelet content references in all sites. |
| **Add Pagelet** | Adds a new pagelet definition based on the current calendar. |

## Publish to Multiple Portals Page

Two pages are available for you to publish pagelets to multiple portals:

- Use the Publish to Multiple Portals page to publish the pagelet definition to additional portals and sites.
- Use the Publish Multiple Pagelets page to publish multiple pagelet definitions to another portal or site.

See the product documentation for *PeopleTools: Portal Technology*.

## Chapter 9

# Working With Discussion Forums

## Understanding Discussion Forums

Discussion forums in Oracle's PeopleSoft Interaction Hub 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. Discussion forums enable multiple relevant individuals to contribute to the review and resolution of a question. Participants can monitor the forums to which they belong using summary and detail pages. In addition, the Discussion Forums pagelet and the Discussion Posts pagelet, each of which can be placed on a participant's homepage, can be used to monitor posts in discussion forums and workspace discussions respectively.

In PeopleSoft Interaction Hub, discussion forums can be created as "standalone" in portals and sites, or as an integrated module of a collaborative workspace. Standalone discussion forums can be accessed through the My Discussion Forums page and the Discussion Forums homepage pagelet. In addition, other PeopleSoft Interaction Hub features integrate some aspects and pages from discussion forums. These PeopleSoft Interaction Hub features include:

- The Discussions module of collaborative workspaces.
- The Related Discussion related content service.
- Action items, documents in the content management system, and documents in the Documents module of collaborative workspaces.
- Context Manager's Related Discussion pagelet.

When portal system administrators create a standalone discussion forum, they can then assign a moderator to manage each forum. The discussion forum moderator determines the membership and privileges for the forum, and has the option to manage the forum as moderated or unmoderated. Forum moderation can be applied to all posts (new topics or replies), or to first-time posts only. If moderation is set to all posts, the moderator has to approve each post before it can be viewed by the forum participants. If moderation is set to first post only, then the first time that a member makes a post (new topic or reply), it has to be approved by the forum moderator. The approval or rejection of a post causes an email notification to be sent to the participant who posted to the forum.

This section also provides an overview of:

- Discussion forum privileges.
- Discussions module in collaborative workspaces.
- Related Discussion related content service.
- Discussion forums in the Related Discussion pagelet.

## Common Elements Used in This Topic

| | |
|---|---|
|  | Indicates that no alerts are set at this level. At the forum level, this indicates that a forum-level alert has not been set. At the topic level, this indicates that neither a forum-level alert nor a topic-level alert have been set. |
|  | Indicates that an alert is set at this level. At the forum level, this indicates that a forum-level alert has been set. At the topic level, this indicates that either a forum-level alert, a topic-level alert, or both have been set. |
|  | Designates that the discussion topic does not yet contain any replies.<br><br>**Note:** This icon also represents replies in the threaded view of a topic. |
|  | Designates that the discussion topic contains one or more replies.<br><br>**Note:** This icon also represents a topic on alert subscription pages. |
|  | Represents a discussion forum on alert subscription pages. |

## Understanding Discussion Forum Privileges

The following table summarizes discussion forum privileges granted by portal role or privilege set ID. Privilege set IDs are defined on the Define Privilege Sets page. Privileges are assigned to discussion forum participants on the Forum Privileges page.

| ***Role ID or Privilege Set ID*** | ***Description*** | ***Privileges*** |
|---|---|---|
| PAPP_SYSTEM_ADMIN | Interaction Hub System Admin role. | A portal administrator can:<br>• Create new discussion forums.<br>• Assign moderators to manage discussion forums.<br>• Manage discussion forums.<br>• Reactivate inactive discussion forums.<br>• Delete discussion forums.<br>• Approve or reject forum posts ( when moderation of the forum is enabled).<br>In addition, as a participant of discussion forum a portal administrator can:<br>• View discussion topics and replies.<br>• Add topics to discussion forums.<br>• Add replies to discussion forums. |
| EPPDF_MODERATOR | Moderator privilege set. | • Manage the discussion forum.<br>• Approve or reject forum posts ( when moderation of the forum is enabled).<br>• Inactivate the discussion forum.<br>• Add topics.<br>• Edit any topic or reply.<br>• Delete any topic or reply.<br>• Edit own topics or replies.<br>• Delete own topics or replies.<br>• View discussion forum topics and replies. |
| EPPDF_CONTRIBUTOR | Contributor privilege set. | • Add topics.<br>• Edit own topics or replies.<br>• Delete own topics or replies (if no replies have been posted to that topic or reply).<br>• View discussion forum topics and replies. |

| *Role ID or Privilege Set ID* | *Description* | *Privileges* |
|---|---|---|
| EPPDF_VIEWER | Viewer privilege set. | View discussion forum topics and replies. |

## Understanding the Discussions Module in Collaborative Workspaces

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. The pages used to participate in discussions in the Discussions module are the same pages used for standalone discussion forums.

In addition, the Discussion Posts pagelet provides information from all workspace discussions to which a workspace member has access. Members can add this pagelet to homepage tabs, dashboard pages, or WorkCenter pages.

### Related Links

"Using the Discussions Module" (PeopleSoft Interaction Hub 9.1: Collaborative Workspaces)

Working With the Discussion Posts Pagelet

## Understanding the Related Discussion Related Content Service

The Related Discussion related content service provides the features of PeopleSoft Interaction Hub discussion forums to other PeopleSoft applications, such as PeopleSoft FSCM, PeopleSoft HCM, and so on.

For example, using the Related Discussion service, users can collaborate to share critical data about a specific vendor or vendors (for example, on a purchase requisition process page). In this example, the vendor name or ID could serve as the context of the discussions. As the user navigates to other POs raised to a specific vendor, all the discussions pertinent to the vendor can be discovered through a search.

See Understanding the Related Discussion Service.

## Understanding Discussion Forums in the Related Discussion Pagelet

The Related Discussion pagelet provides the features of discussion forums in the Context Manager frame on the right side of the page. The Related Discussion pagelet can be assigned to menu items through Context Manager.

See Working With the Related Discussion Pagelet.

# Creating Discussion Forums

This topic discusses steps to create a discussion forum and its policy statement. It also discusses hoe to assign privileges to the participants of discussion forum.

**Note:** Portal system administrators can create standalone discussion forums and then assign a moderator to manage each forum.

## Pages Used to Create Discussion Forums

| Page Name | Definition Name | Usage |
|---|---|---|
| Create Forum Page | EPPDF_FORUM_NEW | Set the properties for a new discussion forum. |
| Forum Privileges Page | EPPDF_FORUM_PRIV | Assign discussion forum participants by user or role. Assign privileges to the participants. |
| Forum Policy Page | EPPDF_FORUM_POLICY | Create a policy statement for the discussion forum. |

## Create Forum Page

Use the Create Forum page (EPPDF_FORUM_NEW) to set the properties for a new discussion forum.

**Navigation**

- My Content, Create Discussion Forum, Forum Privileges
- Click the Create Forum link on the Discussion Forums pagelet.

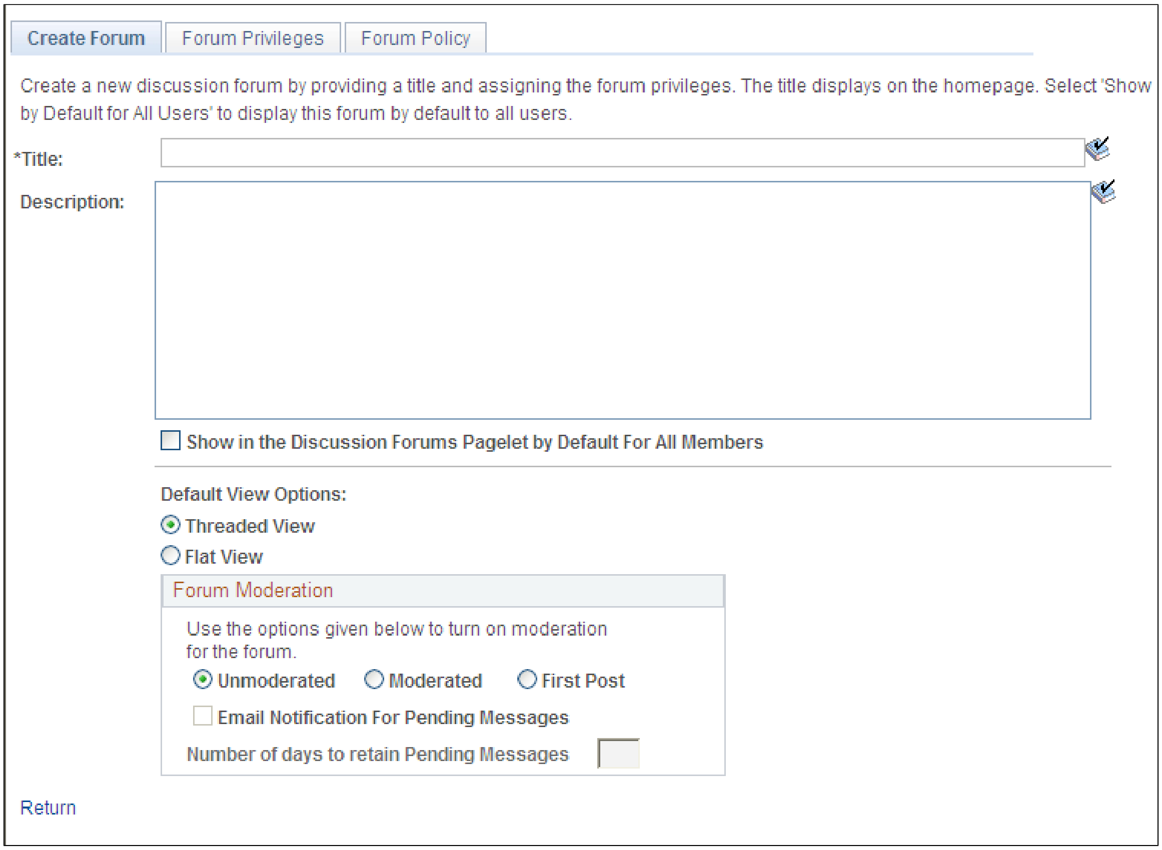
Use the Forum Privileges page (EPPDF_FORUM_PRIV) to assign discussion forum participants by user or role.

Assign privileges to the participants.

**Image: Create Forum page**

This example illustrates the fields and controls on the Create Forum page. You can find definitions for the fields and controls later on this page.




Use the Create Forum page to set the properties for a new discussion forum.

**Title**

Enter a title for the discussion forum. This text appears on the Discussion Forums pagelet as the link to access the discussion forum.

**Description**

Enter a description of the goal of the discussion forum. This text appears on the Discussion Forums pagelet as hover text for the link used to access the discussion forum.

**Show by Default For All Users**

Select to display this discussion forum in the Discussion Forums pagelet by default for all users who are included in the users and roles assigned on the Forum Privileges page.

**Default View Options**

Select the default view for this discussion forum:

- *Threaded View* — Displays the posts for a discussion topic in a hierarchical manner.
- *Flat View* — Displays all posts for a discussion topic and the details of each post.

Forum participants can switch between the threaded view and flat view on the Post Details page.

See Participating in Discussion Forums.

Portal administrators can set the system-level default for this option on the Installation Options page.

See "Defining Installation Options" (PeopleSoft Interaction Hub 9.1: Portal and Site Administration).

**Forum Moderation**

**Note:** Forum moderation applies to all post types—that is, new topics and replies.

Select the moderation option for this forum:

- *Unmoderated* — Posts to this forum are not moderated.
- *Moderated* — All posts to this forum are moderated.

  The forum moderator must review and approve or reject each post to this forum.
- *First Post* — First posts to this forum by each participant are moderated.

  Only the first post for each participant is submitted to the moderator for approval.

**Email Notification For Pending Messages**

Select this option to send an email notification to the forum moderator for each post that requires approval.

**Number of days to retain Pending Messages**

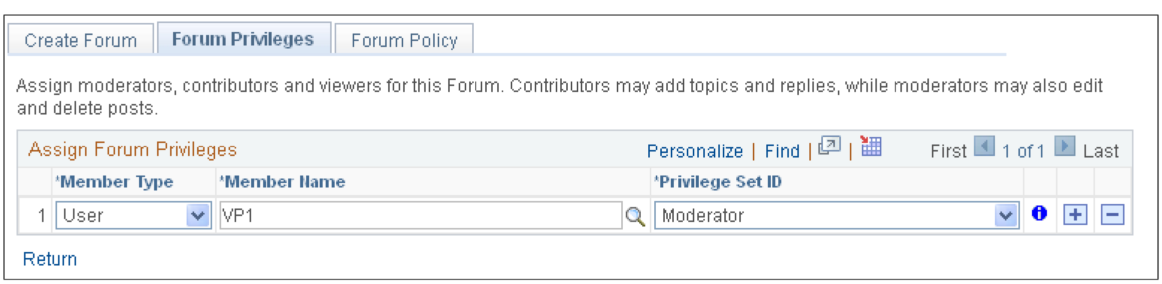
Set the number of days to retain a pending post.

After the set number of days has passed, a pending post will be rejected. Set this field to *0* to retain pending posts indefinitely.

## Forum Privileges Page

**Image: Forum Privileges page**

The following example illustrates the Forum Privileges page. Access the Forum Privileges page (My Content, Create Discussion Forum, Forum Privileges) as shown below.



**Member Type**

Select the type of participant you want to add to the discussion forum:

*Role* — Select to add forum participants by role.

See the product documentation for *PeopleTools: Security Administration*, “Setting Up Roles.”

*User* — Select to add forum participants by user ID.

See the product documentation for *PeopleTools: Security Administration*, “Administering User Profiles.”

**Member Name**

Select the role or user ID.

**Privilege Set ID**

Select the privilege level you want to assign to the member:

*Moderator*

*Contributor*

*Viewer*

---

**Note:** At a minimum, every discussion forum requires a moderator.

---

See Understanding Discussion Forum Privileges.

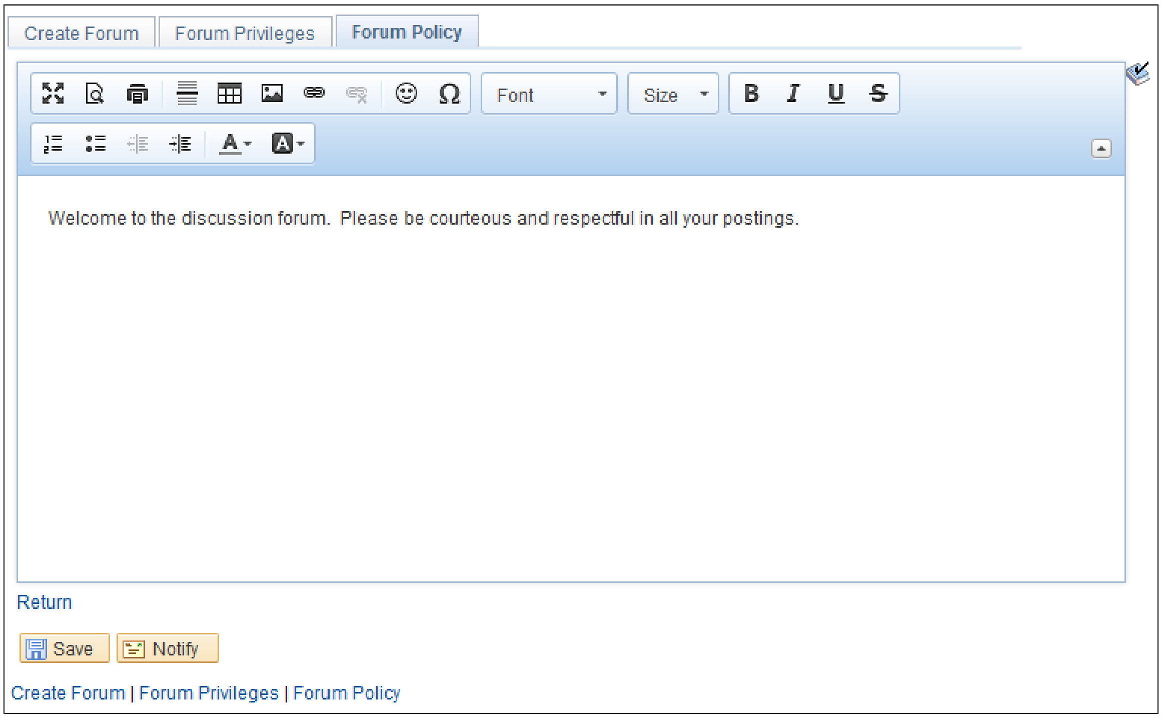
 

## Forum Policy Page

Use the Forum Policy page (My Content, Create Discussion Forum, Forum Policy) to enter policies applicable to the forum.

**Image: Forum Policy page**

The following example illustrates the policy on a discussion forum.




Use the rich text editor to enter any policies that apply to the discussion forum.

# Participating in Discussion Forums

This topic discusses participating in discussion forums.

## Pages Used to Participate in Discussion Forums

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| My Discussion Forums Page | EPPDF_MYFORUMS | Provides access to all of the discussion forums of which you are a participant.<br><br>See Accessing Discussion Forums for more information on this page. |

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| <Discussion Forum> homepage | EPPDF_FORUM | Serves as the homepage for a discussion forum listing all forum topics and providing features to participate in the forum.<br><br>See Accessing Discussion Forums for more information on this page. |
| Create New Topic Page | EPPDF_REPLY_TOPIC | Add a discussion topic to a discussion forum.<br><br>See Creating a New Topicfor more information Create New Topic page. |
| Add a Reply Page | EPPDF_REPLY_TOPIC | Add a reply to a discussion post (topic or reply).<br><br>**Note:** The fields on this page are the same as those on the Create New Topic page.<br><br>See Creating a New Topic. |
| Discussion Page | EPPDF_REPLY_TOPIC | Edit a discussion post (topic or reply).<br><br>**Note:** The fields on this page are the same as those on the Create New Topic page.<br><br>See Creating a New Topic. |
| Post Details Page | EPPDF_VIEW_TOPIC<br><br>EPPDF_VIEW_TOPICS | View details of a discussion post (topic or reply). |
| View Pending Posts Page | EPPDF_MY_PEND_SEC | Review topics that you added that have not been accepted yet by the forum moderator.<br><br>See Viewing Pending Replies Page for more information on viewing pending posts page. |
| View Rejected Posts Page | EPPDF_MY_PEND_SEC | Review topics that you added that have been rejected by the forum moderator.<br><br>See Viewing Pending Replies Page for more information on viewing rejected posts page. |
| View Pending Replies Page | EPPDF_MY_PEND_SEC | Review replies that you added that have not been accepted yet by the forum moderator.<br><br>See Viewing Pending Replies Page for more information on viewing pending replies page. |

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| View Rejected Replies Page | EPPDF_MY_PEND_SEC | Review replies that you added that have been rejected by the forum moderator.<br><br>See Viewing Pending Replies Page for more information on viewing rejected replies page. |
| Forum Policy Page | EPPDF_POLICYDOC_SP | View the policy statement for the discussion forum. |

## Accessing Discussion Forums

Use the Manage Forum page (EPPDF_FORUM_MANAGE) to set the properties for a discussion forum.

**Navigation**

- Click the Manage Forum button on the discussion forum homepage.
- Click the link for a discussion forum on the Administer Discussion Forums page.

Use the My Discussion Forums page (EPPDF_MYFORUMS) to provides access to all of the discussion forums of which you are a participant.

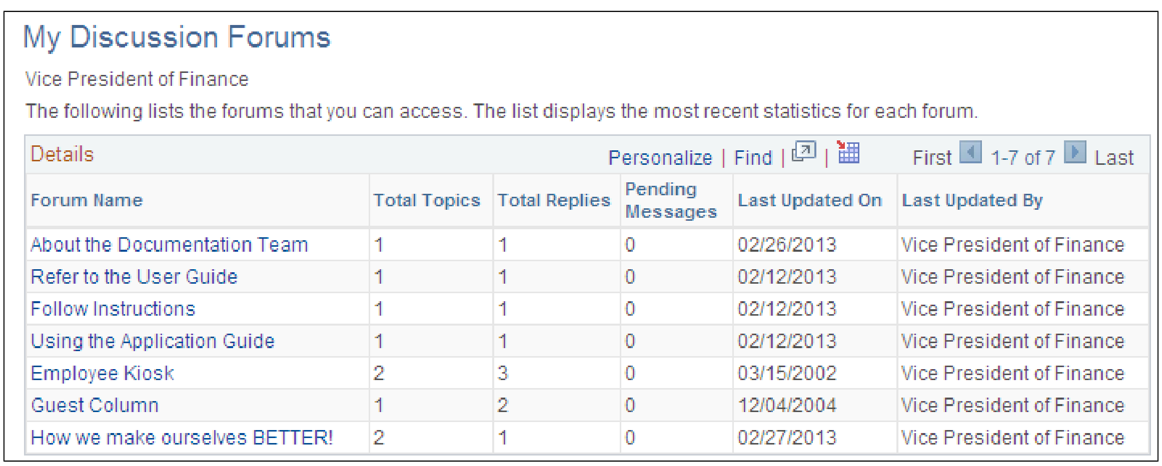
**Navigation**

- My Content, My Discussion Forums
- Click the My Forums link on the Discussion Forums pagelet.

1. Select My Content, My Discussion Forums to access the My Discussion Forums Page.

   **Image: My Discussion Forums page**

   The following example illustrates the My Discussion Forums page.



My Discussion Forums

Vice President of Finance

The following lists the forums that you can access. The list displays the most recent statistics for each forum.

Details Personalize | Find | First 1-7 of 7 Last

| Forum Name | Total Topics | Total Replies | Pending Messages | Last Updated On | Last Updated By |
|---|---|---|---|---|---|
| About the Documentation Team | 1 | 1 | 0 | 02/26/2013 | Vice President of Finance |
| Refer to the User Guide | 1 | 1 | 0 | 02/12/2013 | Vice President of Finance |
| Follow Instructions | 1 | 1 | 0 | 02/12/2013 | Vice President of Finance |
| Using the Application Guide | 1 | 1 | 0 | 02/12/2013 | Vice President of Finance |
| Employee Kiosk | 2 | 3 | 0 | 03/15/2002 | Vice President of Finance |
| Guest Column | 1 | 2 | 0 | 12/04/2004 | Vice President of Finance |
| How we make ourselves BETTER! | 2 | 1 | 0 | 02/27/2013 | Vice President of Finance |

2. Click the link for a discussion forum on the My Discussion Forums page to access the homepage for a discussion forum.

**Image: <Discussion Forum> homepage (moderator view)**

The following example illustrates the <Discussion Forum> homepage (moderator view) as shown below.

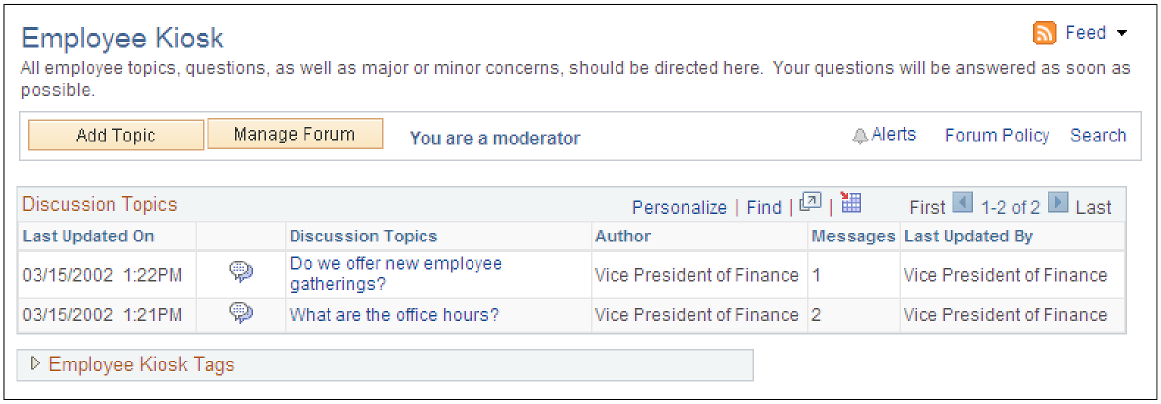
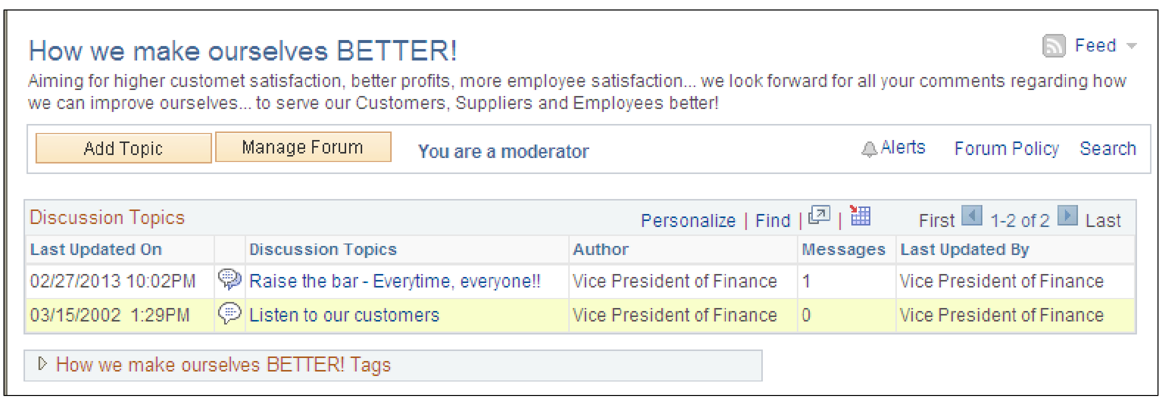



**Image: <Discussion Forum> homepage (contributor view)**

The following example illustrates the <Discussion Forum> homepage (contributor view) as shown below.




Use the discussion forum homepage to participate in the forum.

---

**Note:** Certain functions are available on this page only if you have been granted contributor or moderator privilege for this forum.

---

**View My Pending Posts** Click to access the View Pending Posts page to view which of your new forum topics are pending acceptance by the forum moderator.

**View My Rejected Posts** Click to access the View Rejected Posts page to view which of your new forum topics were rejected by the forum moderator.


Hover over any of these to view the list of feeds published for this discussion forum. 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.<br><br>Click the Open menu button to toggle the list of feeds between frozen open and closed.<br><br>See Viewing and Subscribing to Feeds. |
| **Add Topic** | Click to access the Create New Topic page.<br><br>**Note:** This button appears only for contributors or moderators of the forum. |
| **Manage Forum** | Click to access the Manage Forum page.<br><br>**Note:** This button and the note “You are a moderator” appear only if you are a moderator of the forum. |
| **Alerts** | Click to access the Add Alert Subscription page to manage alerts at the forum level. |
| **Forum Policy** | Click to access the Forum Policy page, which displays the policy statement for the discussion forum. |
| **Search** | Click to access the Search Discussion Forums page to search in the current forum or other discussion forums. |
| **<Discussion Forum> Tags** | Click to view the Tags section for the discussion forum. |

## Creating a New Topic

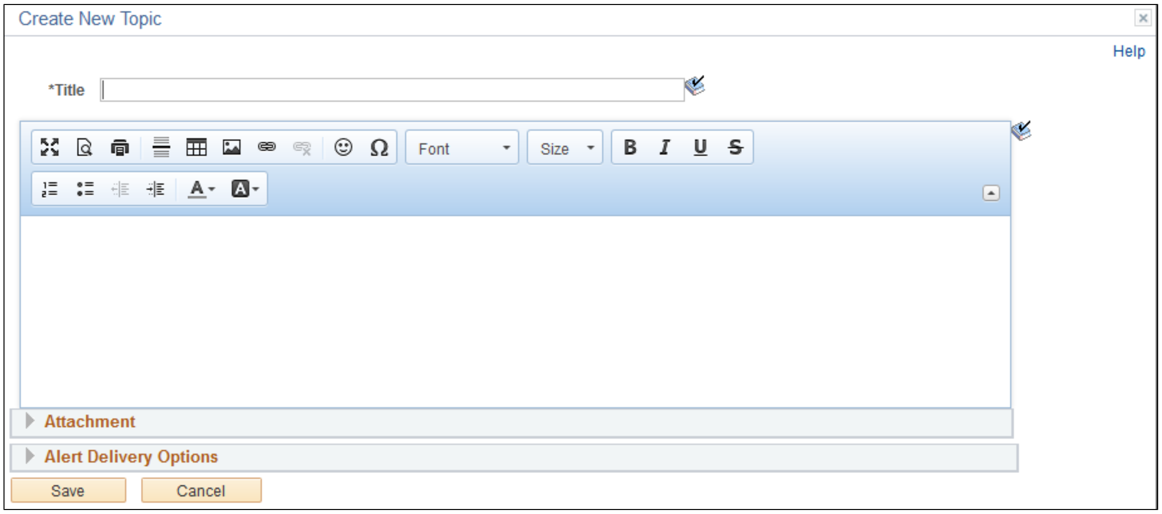
Access the Create New Topic page (click the Add Topic button on the discussion forum homepage).

Access the Add a Reply page (click the Reply button on the Post Details page).

Access the Discussion page (click the Edit button on the Post Details page).

**Image: Create New Topic page**

The following example illustrates the Create New Topic page.




Use the Create New Topic page to add a new discussion topic to a discussion forum.

Use the Add a Reply page to add a reply to any discussion post (topic or reply). The Add a Reply page has the same fields as the Create New Topic page.

Use the Discussion page to edit a discussion post (topic or reply). The Discussion page has the same fields as the Create New Topic page.

| | |
|---|---|
| **Title** | Enter a title for your discussion post. |
| **<edit field>** | Use the rich text editor to enter the text of the post. |
| **Attachment Type** | Select the type of attachment to include with the post:<br>• *File Attachment* — Select to upload a local file.<br>• *Managed Content* — Select to attach a piece of managed content from the PeopleSoft Interaction Hub content management system. |
| **Add Attachment** | If you have selected the *File Attachment* attachment type, click to browse and select the file to upload. |
| **Select Content** | If you have selected the *Managed Content* attachment type, click to look up the items of managed content available in the content management system. |
| **Add Alert Subscription** | Select if you want to receive email alerts regarding updates to this discussion topic. |
| **Frequency** | Select the notification frequency:<br>• *Every Day* — Select to have an email alert sent to you each day that an update occurs. |

- *Once Per Week* — Select to have an email alert sent to you once a week during a week in which an update occurs.

  Select the day of the week in the adjacent drop-down list box.

**Update Subscriptions**

**Note:** If the original post already contains an alert, the Alert Delivery Options group box on the Discussion page does not enable you to define settings. Instead, it provides the Update Subscriptions link.

Click this link to access the Update Alerts Subscription page.

## Post Details Page

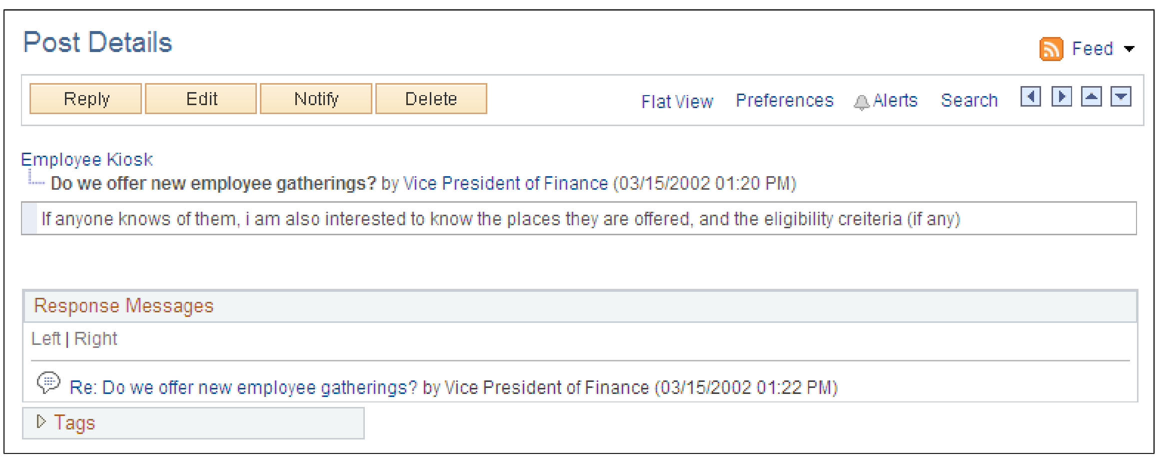
Use the Post Details page (EPPDF_VIEW_TOPIC, EPPDF_VIEW_TOPICS) to view details of a discussion post (topic or reply).

**Navigation**

- Click the link for a topic on the discussion forum homepage.
- Click the link for a topic or a reply in the Discussion Forums pagelet.

**Image: Post Details page (topic selected)**

This example illustrates the fields and controls on the Post Details page (topic selected). You can find definitions for the fields and controls later on this page.




Use the Post Details page to view the details for a discussion post (topic or reply).

**View My Pending Replies**

Click to access the View Pending Replies page to view which of your replies are pending acceptance by the forum moderator.

**View My Rejected Replies**

Click to access the View Rejected Replies page to view which of your replies were rejected by the forum moderator.


Hover over any of these to view the list of feeds published for this discussion forum. 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.<br><br>Click the Open menu button to toggle the list of feeds between frozen open and closed.<br><br>See Viewing and Subscribing to Feeds. |
| **Reply** | Click to access the Add a Reply page to reply to this topic or reply. |
| **Edit** | Click to access the Discussion page to edit this post. |
| **Notify** | Click to access the Notify Members page to send a notification to forum participants. |
| **Delete** | Click to delete this post. Any replies to this post will also be deleted. |
| **Flat View or Threaded View** | Click a Change Display View link to toggle between a threaded view and a flat view. |
| **Preferences** | Click to access the Preferences page to set your preferences for viewing discussion forums. |
| **Alerts** | Click to access the Add Alert Subscription page to manage alerts at the topic and forum levels. |
| **Search** | Click to access the Search Discussion Forums page to search in the current forum or other discussion forums. |
| | Use the Previous Topic and Next Topic buttons to navigate to the previous or next topic in this forum.<br><br>**Note:** Each button is active only when there is a previous or next topic to navigate to. |
| | Use the Previous Post and Next Post buttons to navigate up and down in the hierarchy of posts for this discussion topic.<br><br>**Note:** Each button is active only when there is a previous or next post to navigate to. When you are viewing the topic post, clicking Previous Post navigates to the discussion forum homepage. |
| **<Forum Title> or <Post Title>** | Click to navigate to the discussion forum homepage or to a specific post. |
| **<Author>** | Click to view the member profile for the author of the current post. |
| **Tags** | Click to view the Tags section for the discussion topic. |

This section also discusses how to:

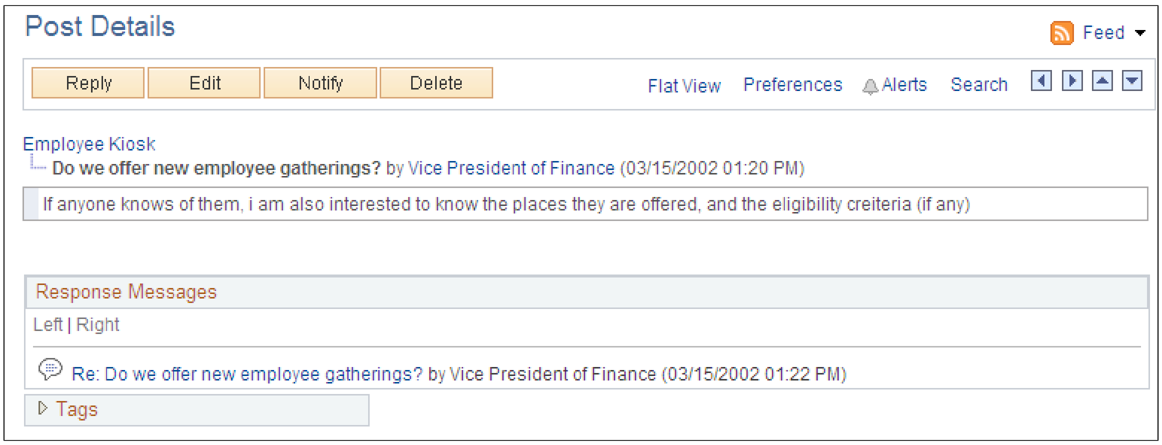
- Compare the threaded and flat views
- Set forum view preferences

## Comparing the Threaded and Flat Views

The threaded view displays only the post titles for a discussion topic in a hierarchical manner. The flat view displays *all* posts for a discussion topic and the *details* of each post.

**Image: Threaded view of the Post Details page**

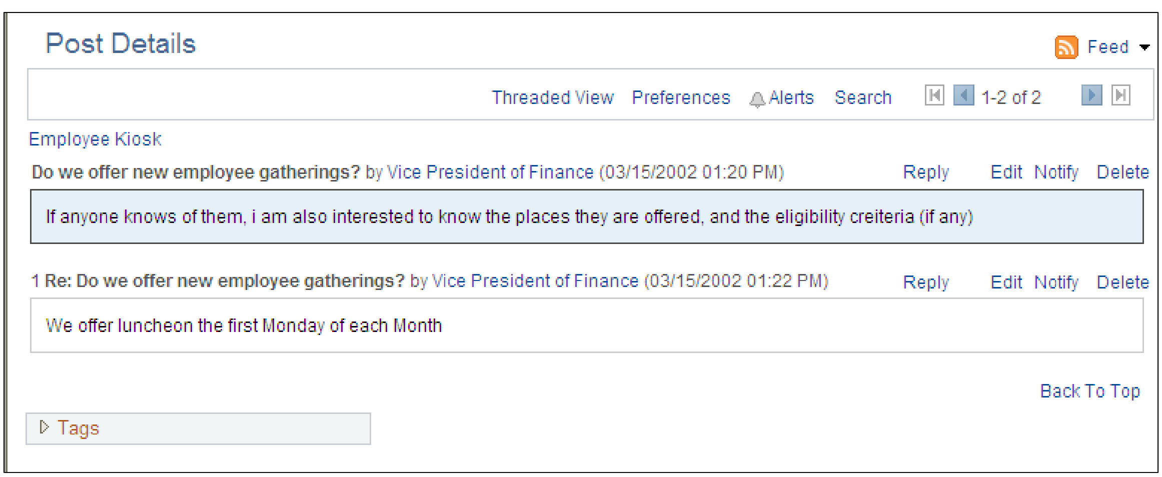
The following is an example of the threaded view, which shows the hierarchy of the discussion topic and replies with details for the selected post only.




Depending on which post is selected, not all posts are displayed for the topic. For example, only the predecessors in a direct line to the currently selected post are displayed. Compare this threaded view with the following flat view.

**Image: Flat view of the Post Details page**

The following is an example of the flat view of the same discussion topic. The post details are displayed with replies to the initial post in the order in which they were posted. This view enables you to see the details of all responses with the currently selected post highlighted.




Compare this flat view with the preceding threaded view. The flat view includes all five posts: the original topic, two replies, and one reply to each reply. The threaded view includes three posts only in a direct line from the original topic to the currently selected reply.

### Setting Forum View Preferences

**Image: Preferences page**

This example illustrates the fields and controls on the Preferences page. You can find definitions for the fields and controls later on this page.


Use the Preferences page to set a personal preference for the display view for all your discussion forums. Select one of the following options:

- *Default View* — Use the view set by the forum moderator.
- *Threaded View* — Use the threaded view for all your discussion forums.
- *Flat View* — Use the flat view for all your discussion forums.

## Viewing Pending Replies Page

Access the View Pending Posts page (click the View My Pending Posts link on the discussion forum homepage).

Access the View Rejected Posts page (click the View My Rejected Posts link on the discussion forum homepage).

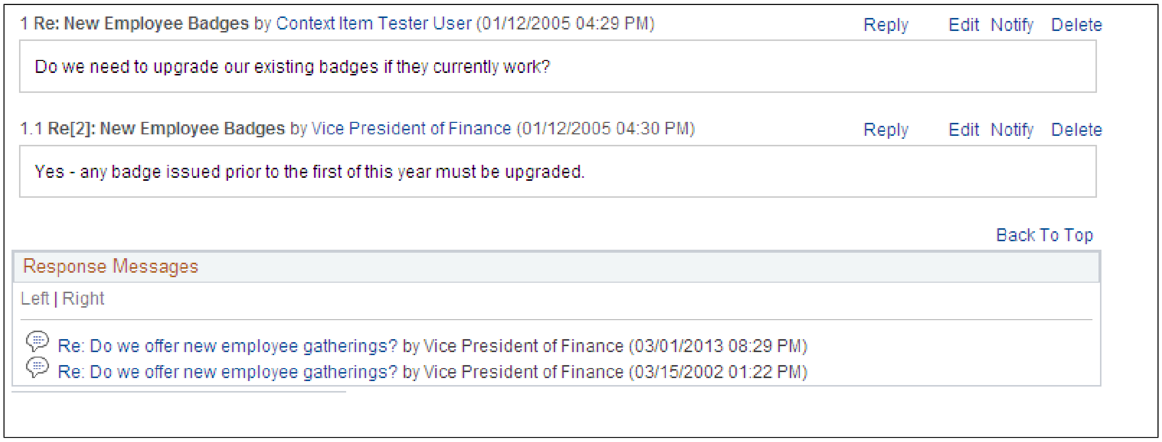
Access the View Pending Replies page (click the View My Pending Replies link on the Post Details page).

Access the View Rejected Replies page (click the View My Rejected Replies link on the Post Details page).

**Image: View Pending Replies page**

This example illustrates the fields and controls on the View Pending Replies page. You can find definitions for the fields and controls later on this page.




Use these pages to view your pending or rejected topics and replies for this discussion forum. The links and buttons are the same for each page. In the preceding example, the View Pending Replies page is shown.

| | |
|---|---|
| **Find** | Click to pop up a dialog box allowing you to search the page contents for a specific topic or reply. |
| **Return** | Click to return to the previous page. |

## Deleting a Post

To delete a post from a discussion forum:

1. Go to the Post Details page for the post that you want to delete.

   **Note:** If the post includes a reply, only the forum moderator can delete the post (and any associated replies). The contributor who added the original post will be unable to delete it.

2. Click the Delete button.
3. Click OK to confirm that you want to delete that post and any associated replies.

## Viewing Discussion Forum Feeds

Once a discussion forum is published as a feed, the link to the forum's feed is available on the discussion forum homepage, the Post Details page, the Discussion Forums pagelet, and in other pages and pagelets in the PeopleSoft Interaction Hub system.

See Viewing and Subscribing to Feeds.

## Using Tags in a Discussion Forum

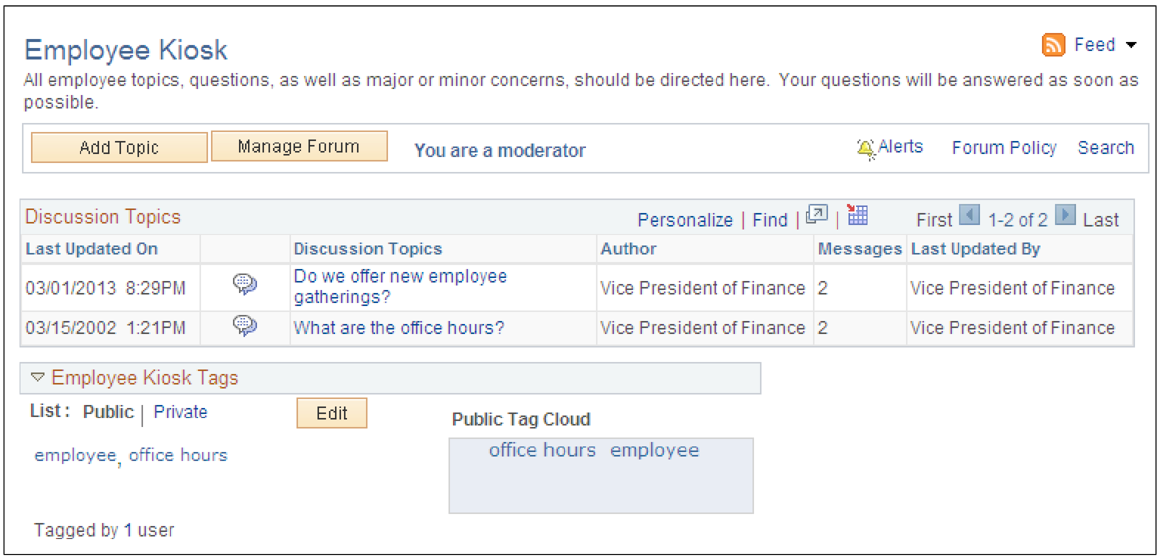
In a discussion forum, tags can be added and managed in the Tags section at two levels:

- At the forum level on the discussion forum homepage.
- At the topic level on the Post Details page.

In addition, the Tags section on the discussion forum homepage includes a tag cloud showing all tags (forum level and topic level) added to this discussion forum. The following example shows the Tags section from a discussion forum homepage:

**Image: A discussion forum homepage showing the Tags section**

This example illustrates the fields and controls on the A discussion forum homepage showing the Tags section.




In this example, *employees* and *kiosk* are tags at the forum level. *NYC, west, offices, Pleasanton,* and *Boston* were added as tags for the first topic; *luncheons* and *gatherings* (not visible) were added as tags for the second topic.

Creating, managing, and using tags is discussed in this PeopleBook.

See Working With the Tasks and Tasks Pagelet.

## Forum Policy Page

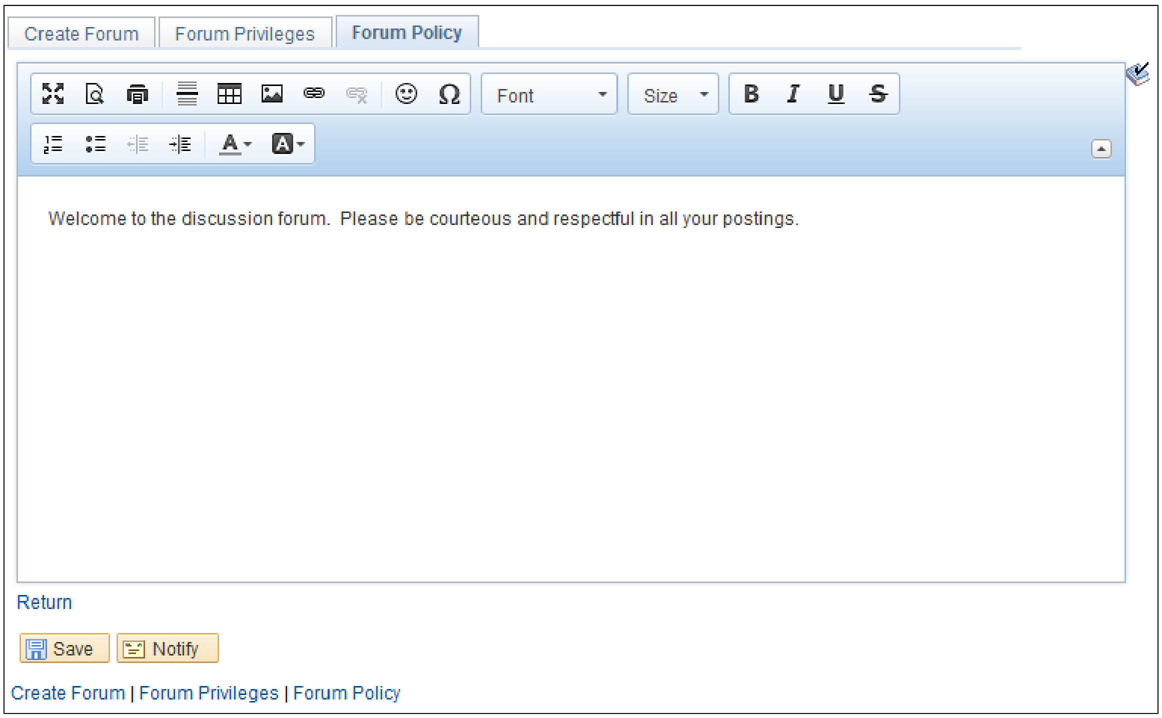
Use the Forum Policy page (EPPDF_POLICYDOC_SP) to view a policy statement for the discussion forum.

**Navigation**

Select a discussion forum, and click Forum Policy.

**Image: Forum Policy page**

This example illustrates the policy statement for a discussion forum.




# Managing Discussion Forums

This topic discusses managing a discussion forum.

## Pages Used to Manage Discussion Forums

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| Manage Forum Page | EPPDF_FORUM_MANAGE | Set the properties for a discussion forum. |
| Forum Privileges Page | EPPDF_FORUM_PRIV | Assign discussion forum participants by user or role. Assign privileges to the participants. |
| Forum Policy Page | EPPDF_FORUM_POLICY | Enter a policy statement for the discussion forum. |
| Pending Messages Page | EPPDF_PENDING_POST | Approve or reject pending posts to the discussion forum.<br><br>See Approving or Rejecting Pending Posts. |

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| View a Post Page | EPPDF_POST_SEC | Review the post text prior to approving or rejecting the post.<br><br>See Approving or Rejecting Pending Posts. |
| Reject Expired Pending Forum Posts/ Blog Comments Page | EPPDF_PSTRJT_RUN | Run the EPPDF_PSTRJT Application Engine program to reject pending posts that have expired.<br><br>See Approving or Rejecting Pending Posts. |
| Administer Discussion Forums Page | EPPDF_MYFORUMS | Delete discussion forums. Also, access the Manage Forum page for each forum. |
| Administer Discussion Forums - Delete Confirmation Page | EO_PE_YESNOCONFIRM | Confirm deletion of the discussion forum.<br><br>See Administer Discussion Forums Page |

## Manage Forum Page

Use the Manage Forum page (EPPDF_FORUM_MANAGE) to view the properties for a Related Discussion service discussion forum.

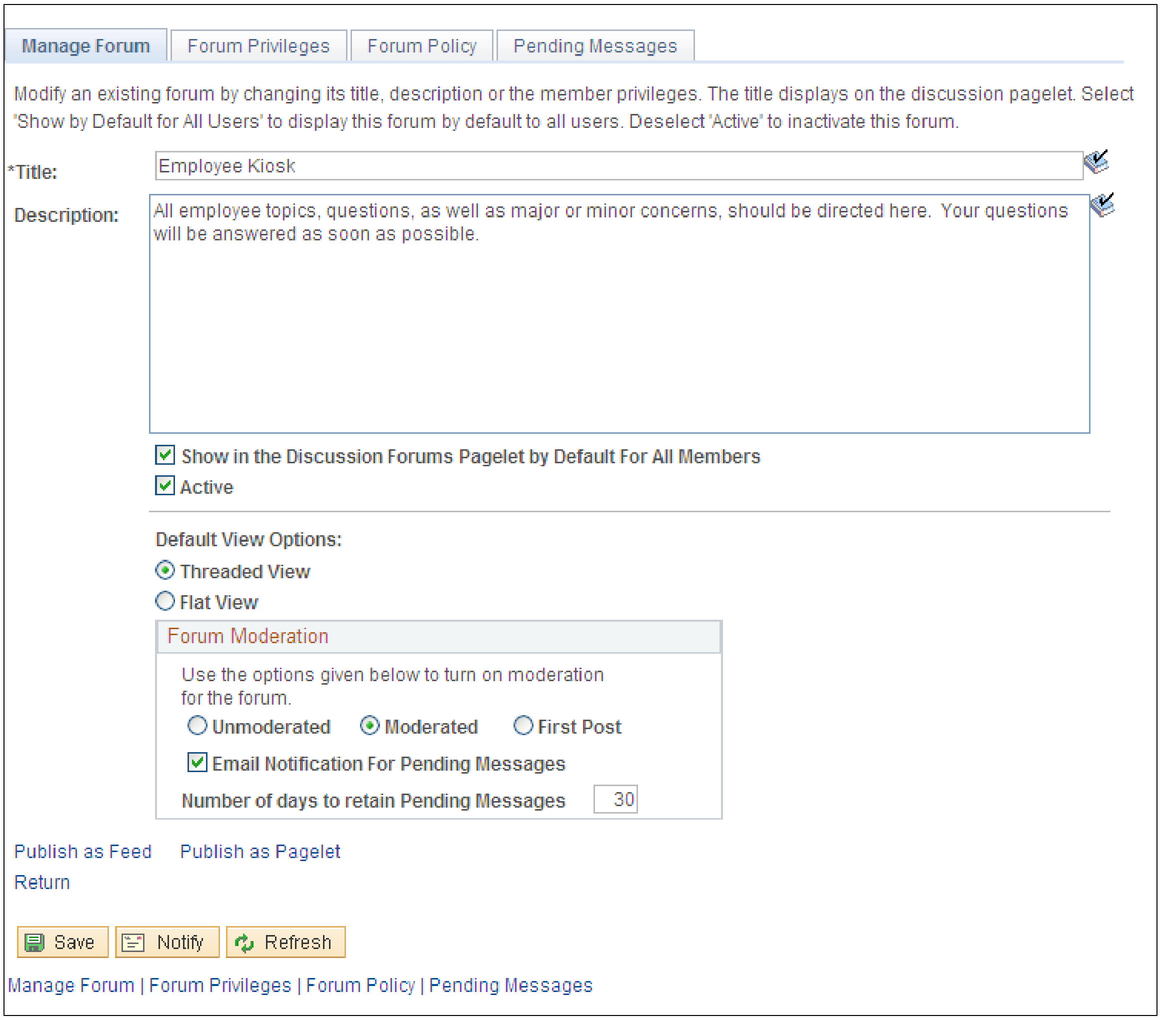
 

### Navigation

On the Forum Privileges page, select the Manage Forum page.

### Image: Manage Forum page

This example illustrates the fields and controls on the Manage Forum page. You can find definitions for the fields and controls later on this page.




Use the Manage Forum page to set the properties for a discussion forum.

| | |
|---|---|
| **Title** | Enter a title for the discussion forum. This text appears on the Discussion Forums pagelet as the link to access the discussion forum. |
| **Description** | Enter a description of the goal of the discussion forum. This text appears on the Discussion Forums pagelet as hover text for the link used to access the discussion forum. |
| **Show by Default For All Users** | Select to display this discussion forum in the Discussion Forums pagelet by default for all users who are included in the users and roles assigned on the Forum Privileges page. |

**Active**

Clear this option to inactivate the discussion forum. The discussion forum will no longer appear for any users in the Discussion Forums pagelet or the My Discussion Forums page.

---

**Note:** To activate a discussion forum that has been inactivated, you must go to the Administer Discussion Forums page to access the forum.

---

Reselect this option to make an inactive forum active again. Reactivating a forum makes existing topics and replies available again.

**Default View Options**

Select the default view for this discussion forum:

- *Threaded View* — Displays the posts for a discussion topic in a hierarchical manner.
- *Flat View* — Displays all posts for a discussion topic and the details of each post.

Forum participants can switch between the threaded view and flat view on the Post Details page.

Portal administrators can set the system-level default for this option on the Installation Options page.

See "Defining Installation Options" (PeopleSoft Interaction Hub 9.1: Portal and Site Administration).

**Forum Moderation**

---

**Note:** Forum moderation applies to all post types—that is, new topics and replies.

---

Select the moderation option for this forum:

- *Unmoderated* — Posts to this forum are not moderated.
- *Moderated* — All posts to this forum are moderated.

  The forum moderator must review and approve or reject each post to this forum.
- *First Post* — First posts to this forum by each participant are moderated.

  Only the first post for each participant is submitted to the moderator for approval.

**Email Notification For Pending Messages**

Select this option to send an email notification to the forum moderator for each post that requires approval.

**Number of days to retain Pending Messages**

Set the number of days to retain a pending post.

After the set number of days has passed, a pending post will be rejected. Set this field to *0* to retain pending posts indefinitely.

| | |
|---|---|
| **Publish as Feed** | Click to access the Manage Forum - Publish Feed Definition page to publish this discussion forum as a feed. |
| **Publish as Pagelet** | Click to access the Manage Forum - Publish Pagelet Wizard Definition page to publish this discussion forum as a pagelet. |
| **Return** | Click to return to the previous page. |

This section also discusses how to:

- Manage discussion forum participants and privileges.
- Manage the discussion forum policy statement.

### Managing Discussion Forum Participants and Privileges

Use the Forum Privileges page (EPPDF_FORUM_PRIV) to assign discussion forum participants by user or role.

Assign privileges to the participants.

**Navigation**

On the Manage Forum page, select the Forum Privileges page.

See Forum Privileges Page.

### Managing the Discussion Forum Policy Statement

Use the Forum Policy page (EPPDF_FORUM_POLICY) to create a policy statement for the discussion forum.

**Navigation**

My Content, Create Discussion Forum, Forum Policy

See Forum Policy Page.

## Approving or Rejecting Pending Posts

This section discusses how to:

- Approve or reject posts manually.
- Review a post.
- Reject expired posts automatically.

---

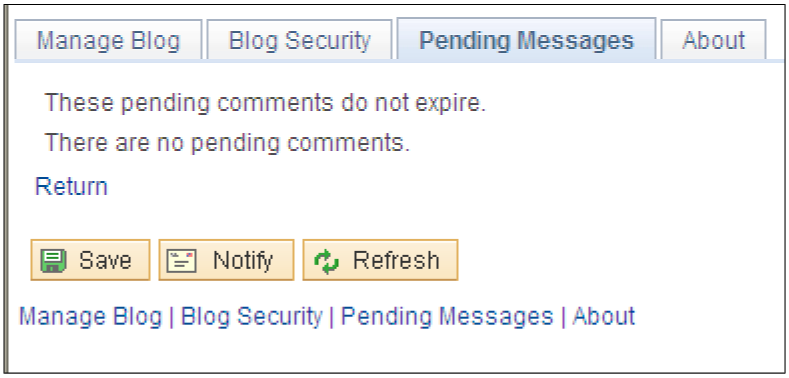
**Note:** The approval or rejection of a post causes an email notification to be sent to the participant who posted to the forum.

---

## Approving or Rejecting Posts Manually

**Image: Pending Messages page**

This example illustrates the fields and controls on the Pending Messages page. You can find definitions for the fields and controls later on this page.




Use the Pending Messages page to approve or reject posts (new topics or replies) to the discussion forum.

| | |
|---|---|
| **Select** | Select one or more posts to update in bulk. |
| **Title** | Click a post title to access the View a Post page to review the posted text. |
| **Post Status and Change Selected To** | Select one of the following statuses:<br>• *Approved*<br>• *Pending*<br>• *Rejected* |
| **Select All** | Click to select all listed posts. |
| **Clear All** | Click to clear the selection of all listed posts. |
| **Return** | Click to return to the previous page. |

## Reviewing a Post

Use the View a Post page (EPPDF_POST_SEC) to Review the post text prior to approving or rejecting the post.

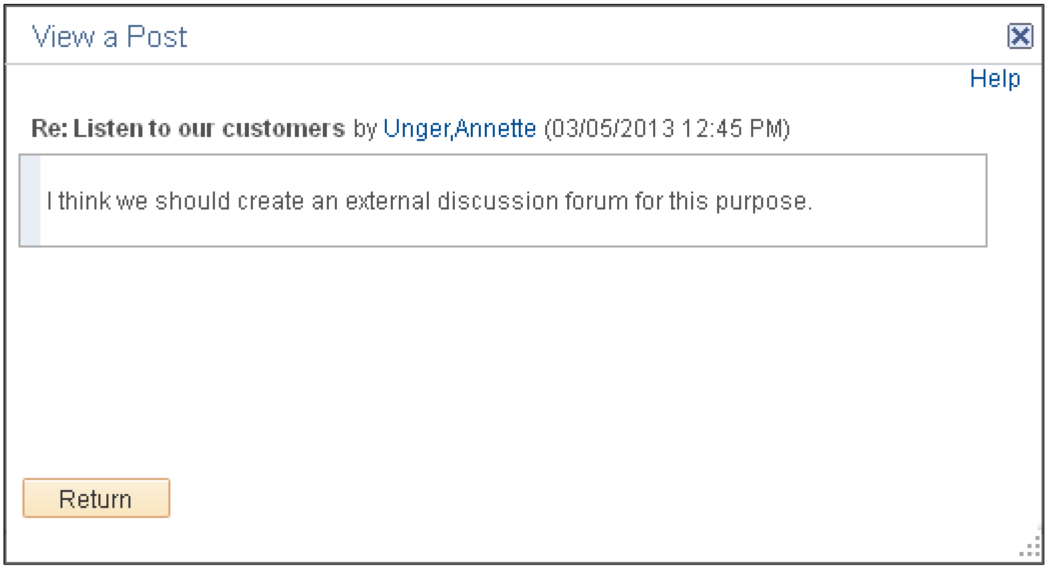
 

**Navigation**

Click the title for a post on the Pending Messages page.

**Image: View a Post page**

This example illustrates the fields and controls on the View a Post page.




Use the View a Post page to review the post text prior to approving or rejecting the post. Click Return to return to the Pending Messages page.

### Rejecting Expired Posts Automatically

Access the Reject Expired Pending Forum Posts/Blog Comments page (select Portal Administration, Discussion Forums, Reject Expired Posts/Comments).

Run the EPPDF_PSTRJT Application Engine program to reject pending posts that have expired. This program searches for all pending posts and checks the authored date for each. If the difference between the current date and the authored date is equal to or greater than the number of days set on the Manage Forum page for that discussion forum, then the message status is set to rejected.

Set the process recurrence for the EPPDF_PSTRJT program to a frequency suitable for your system—for example, *M-F at 5pm.*

## Publishing a Discussion Forum as a Feed

Discussion forums can be published as feeds. Once published, the link to a discussion forum's feed is available on the discussion forum homepage, the Post Details page, the Discussion Forums pagelet, and in other pages and pagelets in the PeopleSoft Interaction Hub system.

There are no special advanced options for discussion forum feeds. Therefore, the standard feed publishing process can be followed.

See Publishing PeopleSoft Interaction Hub Content as a Feed.

## Administer Discussion Forums Page

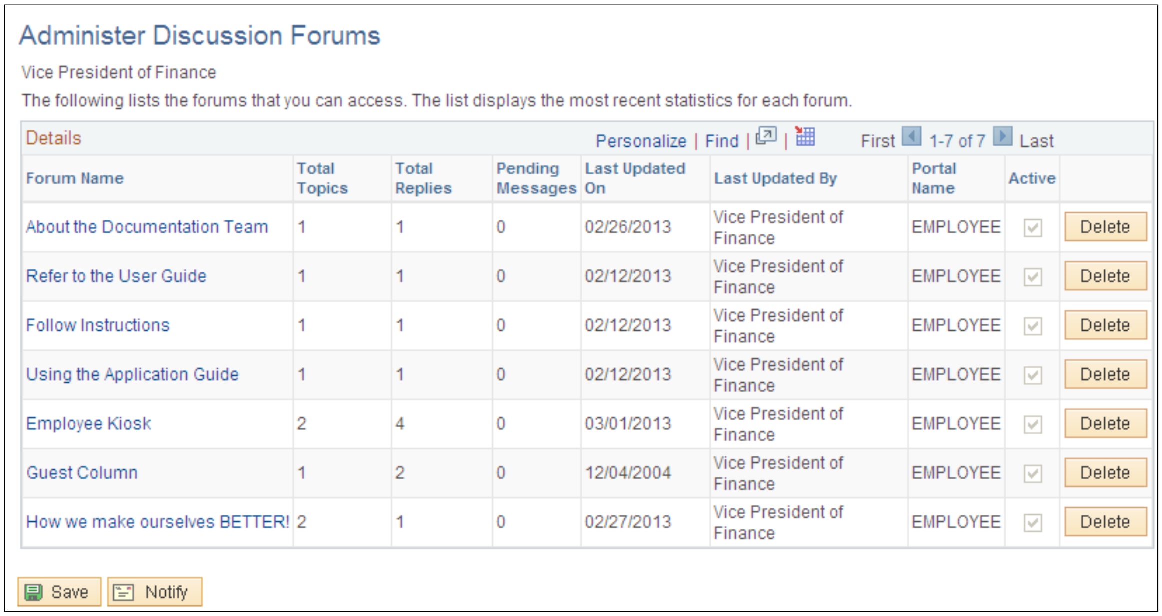
Use the Administer Discussion Forums page (EPPDF_MYFORUMS) to delete discussion forums and to access the Manage Forum page for each forum.

**Navigation**

Portal Administration, Discussion Forums, Administer Forums

**Image: Administer Discussion Forums page**

This example illustrates the fields and controls on the Administer Discussion Forums page. You can find definitions for the fields and controls later on this page.




| Forum Name | Total Topics | Total Replies | Pending Messages | Last Updated On | Last Updated By | Portal Name | Active | |
|---|---|---|---|---|---|---|---|---|
| About the Documentation Team | 1 | 1 | 0 | 02/26/2013 | Vice President of Finance | EMPLOYEE | ✓ | Delete |
| Refer to the User Guide | 1 | 1 | 0 | 02/12/2013 | Vice President of Finance | EMPLOYEE | ✓ | Delete |
| Follow Instructions | 1 | 1 | 0 | 02/12/2013 | Vice President of Finance | EMPLOYEE | ✓ | Delete |
| Using the Application Guide | 1 | 1 | 0 | 02/12/2013 | Vice President of Finance | EMPLOYEE | ✓ | Delete |
| Employee Kiosk | 2 | 4 | 0 | 03/01/2013 | Vice President of Finance | EMPLOYEE | ✓ | Delete |
| Guest Column | 1 | 2 | 0 | 12/04/2004 | Vice President of Finance | EMPLOYEE | ✓ | Delete |
| How we make ourselves BETTER! | 2 | 1 | 0 | 02/27/2013 | Vice President of Finance | EMPLOYEE | ✓ | Delete |

Use the Administer Discussion Forums page to delete discussion forums and to access the Manage Forum page for each forum.

---

**Note:** When this page is accessed from the Related Discussion Forums pagelet, the page is titled Manage Related Discussions.

---

**Forum Name**

Click the title for a forum to access its Manage Forum page.

**Note:** Forums that have been inactivated can be accessed through the Administer Discussion Forums page only.

**Delete**

Click to delete the forum.

## Publishing a Discussion Forum as a Pagelet

This section discusses how to:

- Publish a pagelet from a discussion forum.

- Publish a discussion forum from Pagelet Wizard.
- Edit a published pagelet.
- Publish a pagelet to multiple portals.

Use the Pagelet Wizard - Pagelet Creation Confirmed page (PTPPB_WIZ_FINISH) to confirm that the creation of the pagelet is complete.

**Navigation**

Click the Finish button on the Pagelet Wizard - Specify Publishing Options page.

Use the Publish to Multiple Portals page (PTPP_PMPUBPRTL) to publish the pagelet definition to additional portals and sites.

**Navigation**

- Click the Publish Pagelet in Other Sites link on the Manage Forum - Publish Pagelet Wizard Definition page.
- Portal Administration, Pagelets, Publish Pagelets
- PeopleTools, Portal, Portal Utilities, Publish Pagelets

Use the Publish Multiple Pagelets page (PTPP_PMPUBPGLT) to publish multiple pagelet definitions to another portal or site.

**Navigation**

- On the Publish to Multiple Portals page, select Publish Multiple Pagelets.
- Portal Administration, Pagelets, Publish Pagelets, Publish Multiple Pagelets
- PeopleTools, Portal, Portal Utilities, Publish Pagelets, Publish Multiple Pagelets

## Pages Used to Publish Discussion Forums as Pagelets

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| Manage Forum - Publish Pagelet Wizard Definition Page | EPPPB_PGLT_PUB | Create a pagelet definition for a discussion forum. |
| Pagelet Wizard - Specify Pagelet Information Page | PTPPB_WIZ_INFO | Provide information to identify and categorize a pagelet.<br><br>See step 1 of Publishing a Discussion Forum from Pagelet Wizard. |
| Pagelet Wizard - Select Data Source Page | PTPPB_WIZ_DATASRC | Select the type of data source for the pagelet.<br><br>See step 2 of Publishing a Discussion Forum from Pagelet Wizard. |

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| Pagelet Wizard - Specify Data Source Parameters Page | PTPPB_WIZ_DATAPRMS | Configure the data source parameters that are required for data to be displayed in the pagelet.<br><br>This page is accessible only when you are building a pagelet with a data source that allows modification of associated parameters.<br><br>See step 3 of Publishing a Discussion Forum from Pagelet Wizard. |
| Pagelet Wizard - Specify Data Source Parameter Values Page | PTPPB_WIZ_PRMVALS | Specify prompt values for the end user to select from when personalizing the pagelet.<br><br>Click the Values link on the Pagelet Wizard - Specify Data Source Parameters page.<br><br>This page is accessible only for data source parameters for which you have selected the *User Specified* or *Admin Specified* usage types.<br><br>See step 3 of Publishing a Discussion Forum from Pagelet Wizard. |
| Pagelet Wizard - Select Display Format Page | PTPPB_WIZ_DISPFRMT | Specify the data transformation method and display format for the pagelet.<br><br>See step 4 of Publishing a Discussion Forum from Pagelet Wizard. |
| Pagelet Wizard - Specify Display Options Page | PTPPB_WIZ_DISP_CUS | Enter the custom formatting details for the pagelet as well as header and footer options. Preview the pagelet.<br><br>See step 5 of Publishing a Discussion Forum from Pagelet Wizard. |
| Pagelet Wizard - Specify Publishing Options Page | PTPPB_WIZ_PUBOPT | Specify the manner in which the pagelet is published. Provide registration, caching, and security details, and register the pagelet.<br><br>See step 6 of Publishing a Discussion Forum from Pagelet Wizard. |
| Pagelet Wizard - Pagelet Creation Confirmed Page | PTPPB_WIZ_FINISH | Confirm that the creation of the pagelet is complete.<br><br>Click the Finish button on the Pagelet Wizard - Specify Publishing Options page.<br><br>See step 6 of Publishing a Discussion Forum from Pagelet Wizard. |

| Page Name | Definition Name | Usage |
|---|---|---|
| Manage Forum - Publish as Pagelet Page | EPPPB_PGLT_LST | Administer pagelet definitions for a discussion forum. |
| Publish to Multiple Portals Page | PTPP_PMPUBPRTL | Publish the pagelet definition to additional portals and sites. |
| Publish Multiple Pagelets Page | PTPP_PMPUBPGLT | Publish multiple pagelet definitions to another portal or site.<br><br>See Publish to Multiple Portals Page. |

## Manage Forum - Publish Pagelet Wizard Definition Page

Use the Manage Forum - Publish Pagelet Wizard Definition page (EPPPB_PGLT_PUB) to create a pagelet definition for a discussion forum.

**Navigation**

- My Content, My Discussion Forums

  Click the link for the discussion forum on the My Discussion Forums page.

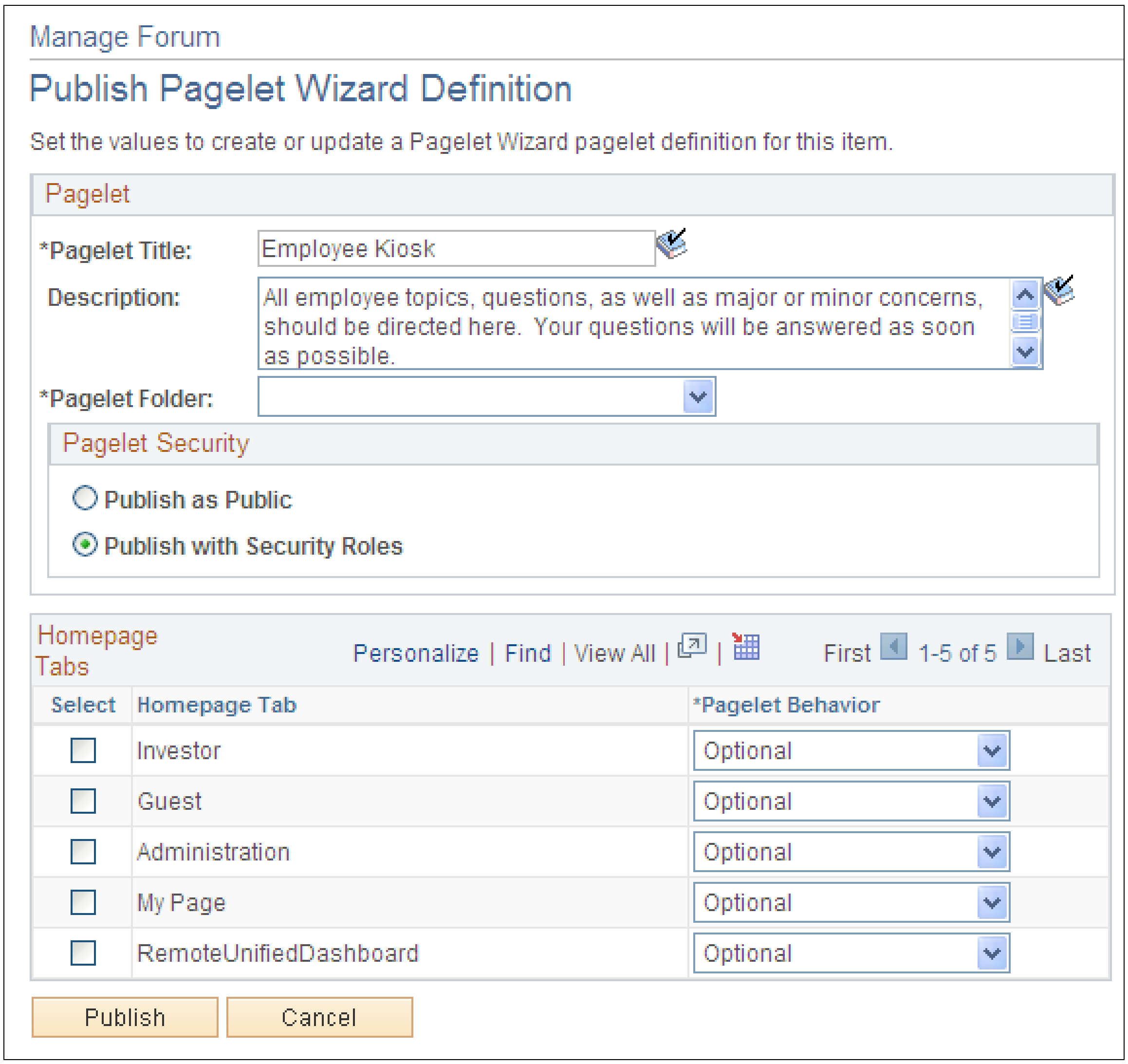
  Click the Manage Forum button on the discussion forum homepage.

  Click the Publish as Pagelet link on the Manage Forum page.

- Click the Add Pagelet button or the Edit button on the Manage Forum - Publish as Pagelet page.

**Image: Manage Forum - Publish Pagelet Wizard Definition Page**

This example illustrates the fields and controls on the Manage Forum - Publish Pagelet Wizard Definition Page. You can find definitions for the fields and controls later on this page.




Use the Manage Forum - Publish Pagelet Wizard Definition page to create a pagelet definition for a discussion forum.

### Pagelet

The pagelet title and description from the Manage Forum page appear in the Pagelet group box. You can edit these two fields, if necessary.

**Pagelet Title** Displays the title for the discussion forum, which can be edited as the title for the pagelet.

**Description** Displays the description for the discussion forum, which can be edited as the description for the pagelet.

**Pagelet Folder** Select a folder to publish to. Only folders from the current site are available to select.

**Pagelet Security** Select the security options for viewing the pagelet. Available options are:

*Publish as Public*, which enables all users to view the pagelet.

*Publish with Security Roles*, which uses the roles defined on the Forum Privileges page when publishing the pagelet.

**Note:** If there are no roles defined on the Forum Privileges page, the system automatically selects to publish the pagelet as public.

### Homepage Tabs

Use this group box to define the homepage tab labels and behavior for the pagelet.

**Homepage Tab** Select the tabs that will display the pagelet.

**Pagelet Behavior** Select the behavior options for the pagelet.

*Optional*. The pagelet will not automatically appear on the homepage. However, it is available for selection when users personalize their homepages. This setting should not be used for guest homepage pagelets because guest users do not have personalization privileges.

*Optional-Default*. The pagelet will appear on all user homepages if they have access to the pagelet. The pagelet can be removed when users personalize their homepages. This setting should not be used for guest homepage pagelets because guest users do not have personalization privileges.

*Required-Fixed*. The pagelet will appear on all user homepages if they have access to the pagelet. The placement of the pagelet cannot be changed and the pagelet cannot be removed from the homepage.

*Required*. The pagelet will appear on all user homepages if they have access to the pagelet. The placement of the pagelet can be changed, but it cannot be removed from the homepage.

| | |
|---|---|
| **Publish** | Click the Publish button to publish this pagelet and display the Manage Forum - Publish as Pagelet page, on which you can review or edit the pagelet definition |

## Publishing a Discussion Forum from Pagelet Wizard

Pagelets for discussion forums can be created and published using Pagelet Wizard and then managed from the Manage Forum page. This section provides an overview of how to use Pagelet Wizard to complete the following six steps:

- Step 1: Entering Pagelet Identifying Information.
- Step 2: Selecting a Pagelet Data Source.
- Step 3: Specifying Data Source Parameters.

  Step 3 also includes “Specifying Prompt Values for Data Source Parameters.”
- Step 4: Selecting a Pagelet Display Format.
- Step 5: Specifying Pagelet Display Options.
- Step 6: Specifying Pagelet Publication Options.

---

**Note:** If you access Pagelet Wizard from the Go to Pagelet Wizard link, you will be modifying an existing pagelet definition. If you want to create a new pagelet definition, start from the Portal Administration or PeopleTools navigation path.

---

Where appropriate, this section provides details specific to using Pagelet Wizard to publish a discussion forum as a pagelet. The PeopleTools 8.50 PeopleBooks provide detailed information on using Pagelet Wizard.

See the product documentation for *PeopleTools: Portal Technology*, “Using Pagelet Wizard to Create and Manage Pagelets.”

### Step 1: Entering Pagelet Identifying Information

Access the Pagelet Wizard - Specify Pagelet Information page (click the Go to Pagelet Wizard link on the Manage Forum - Publish Pagelet Wizard Definition page; or Portal Administration, Pagelets, Pagelet Wizard, Pagelet Wizard).

Use the Pagelet Wizard - Specify Pagelet Information page to identify and categorize a pagelet.

See the product documentation for *PeopleTools: Portal Technology*, “Using Pagelet Wizard to Create and Manage Pagelets,” Step 1: Entering Pagelet Identifying Information.

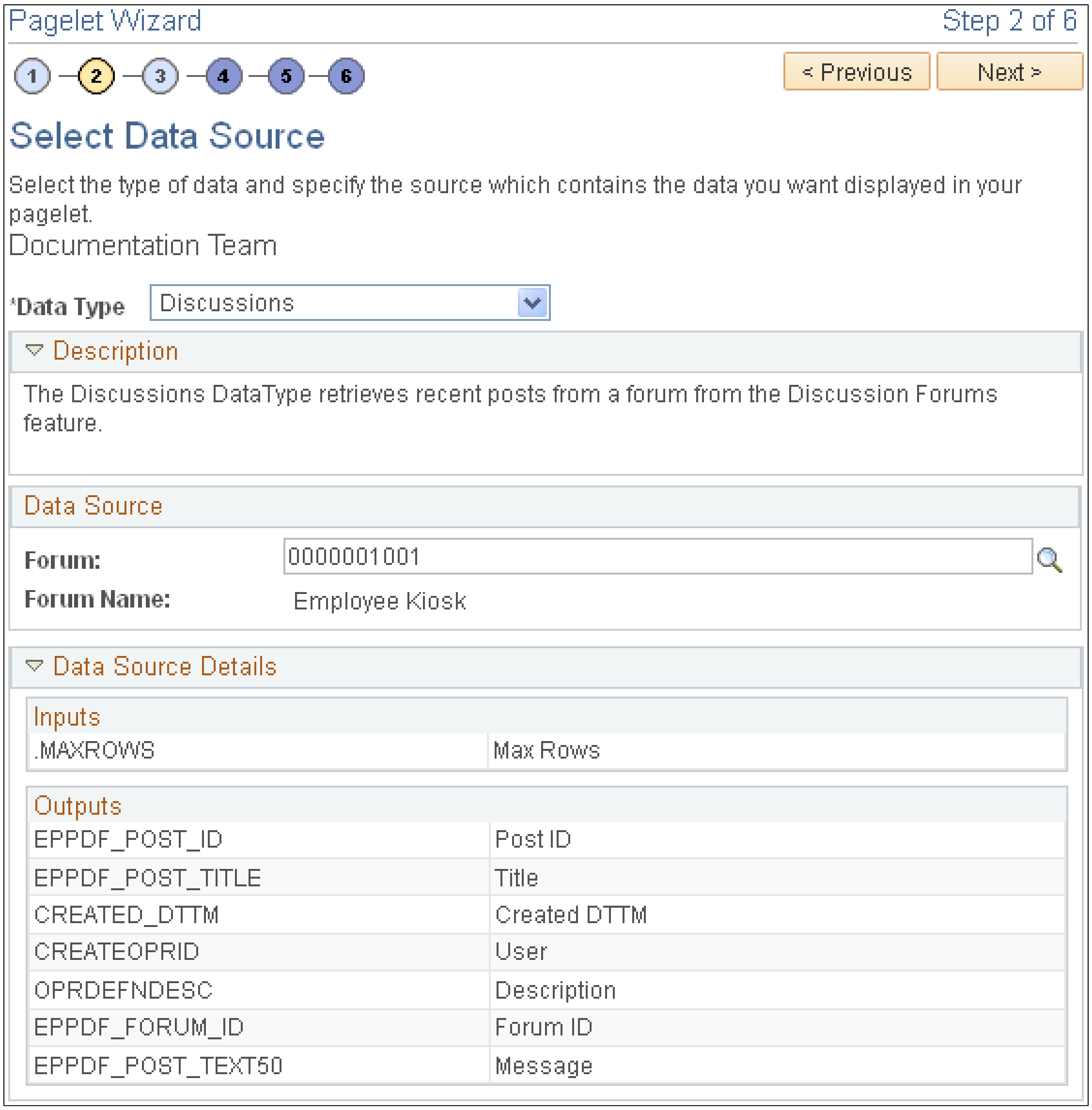
 

## Step 2: Selecting a Pagelet Data Source

Access the Pagelet Wizard - Select Data Source page (click the Next button on the Pagelet Wizard - Specify Pagelet Information page).

**Image: Pagelet Wizard - Select Data Source page (discussions data type)**

This example illustrates the fields and controls on the Pagelet Wizard - Select Data Source page (discussions data type).




Use the Pagelet Wizard - Select Data Source page to select the Pagelet Wizard data source type.

| | |
|---|---|
| **Data Type** | For discussion forums, select Discussions. |
| **Forum** | Select the discussion forum to display in the pagelet. |
| **Inputs** | Displays the data source parameters that are used to retrieve data for the pagelet. |

**Outputs**

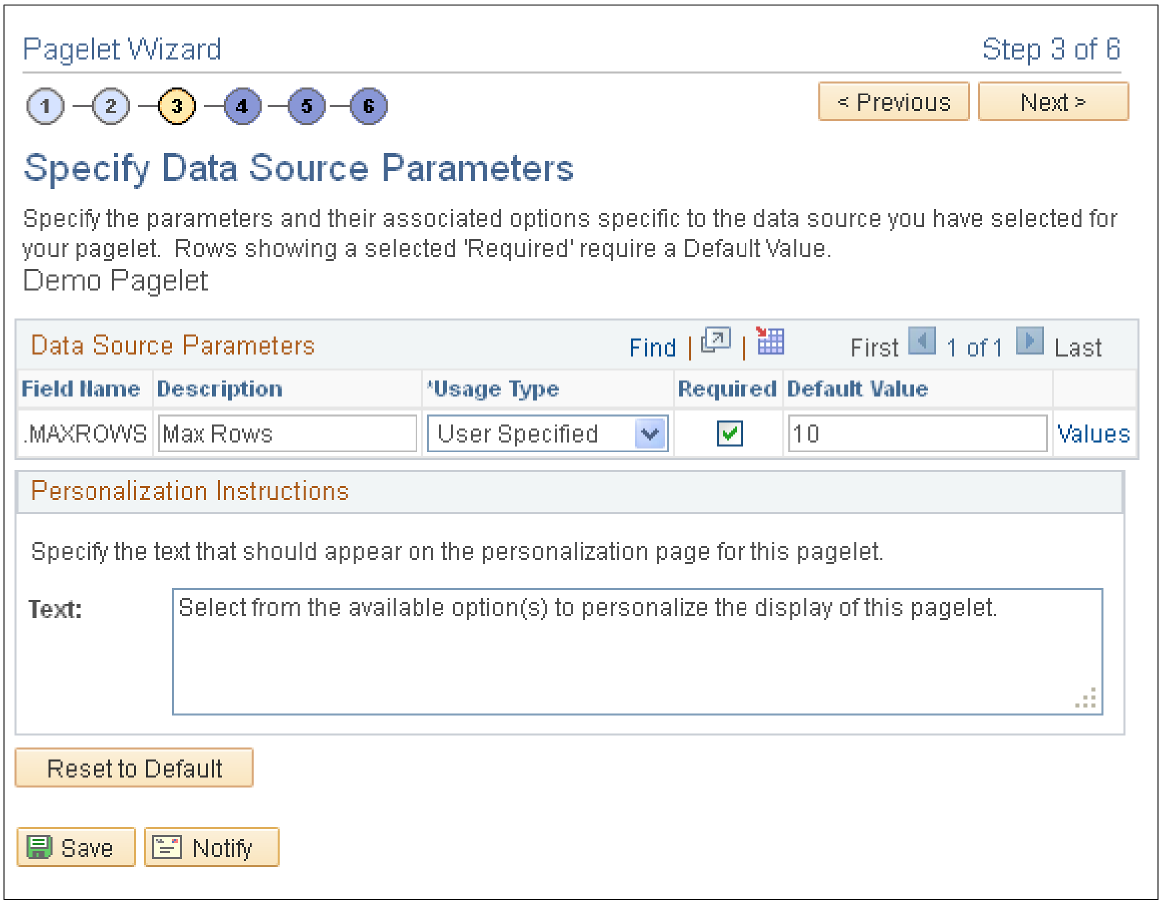
Displays the data source parameter fields that are displayed as output in the pagelet.

### Step 3: Specifying Data Source Parameters

Access the Pagelet Wizard - Specify Data Source Parameters page (select *Discussions* as the data type on the Pagelet Wizard - Select Data Source page, then click the Next button).

**Image: Pagelet Wizard - Specify Data Source Parameters page (discussions data source)**

This example illustrates the fields and controls on the Pagelet Wizard - Specify Data Source Parameters page (discussions data source). You can find definitions for the fields and controls later on this page.




Use the Pagelet Wizard - Specify Data Source Parameters page to configure the data source parameters that are required for data to be displayed in the pagelet.

---

**Note:** This page is accessible only when you are building a pagelet with a data source that allows modification of associated parameters.

---

**Field Name**

Displays the name of the data source parameter.

For discussion forums, the following data source parameters can be defined:

MAXROWS — Limits the number of entries displayed in the pagelet

**Description**

Displays a description of the data source parameter.

**Usage Type**

Select the type of accessibility that you want to grant for the data source parameter when it appears in the pagelet. Options are:

- *Admin Specified:* Select to enable those users with administrative privileges to specify variables for this field, as well as access the Configure link on the published pagelet and select from those parameters for users.
- *Context Sensitive:* Select to enable Context Manager to specify a data source parameter value for this field.
- *Fixed:* Select to enter a fixed value for the data source parameter that the end user cannot modify.
- *System Variable:* Select to assign a system variable as the data source parameter value. The value of the system variable is automatically inserted into the parameter when the pagelet appears. When you select this option, the pagelet end user cannot modify the data source parameter.

  For example, suppose that you specify *%UserId* as the system variable for a parameter name User. When the pagelet appears on a user's homepage, the User field is populated by the *%UserId* system variable, which is the user ID used to access the pagelet.
- *User Specified:* Select to enable end users to specify a data source parameter value for this field. When a pagelet contains a user-specified parameter, the Customize button appears on the pagelet title bar.

  End users can click this button to access a personalization page, on which they can select a data source parameter value that they want to use for the pagelet. Users can select a value from a prompt, or they can manually enter their own value if no prompt values are available.

  If you change the usage type from or to *User Specified* for a data source parameter on a published homepage pagelet, you must unpublish and then republish the pagelet.

**Required**

This check box is selected and disabled for parameters specified as administrator-specified, context-sensitive, fixed, and system variable; otherwise, it is selected but enabled for user-specified parameters.

**Default Value**

You can enter a value that includes the % and * wildcards at the beginning or end of a value in the Default Value field.

Note the following about default values:

- If you select *User Specified* as the usage type and the data source parameter is a required value, you must enter the default value that should appear before a user enters a value. If the data source parameter is not a required value, you do not have to enter a default value.

  If you select a default value when defining prompt values on the Pagelet Wizard - Specify Data Source Parameter Values page, that default value populates this field.

  If you select *User Specified* as the usage type, you can also enter a system variable as the default value. For example, to make the current date the default value for a user-specified parameter, enter a default value of *%Date.*

- If you select *System Variable* as the usage type, you must enter a system variable to use as the data source parameter value. You can use the Look up Value button to access a list of valid system variables.

  See the product documentation for *PeopleTools: Portal Technology*, "Using Pagelet Wizard to Create and Manage Pagelets," Step 3: Specifying Pagelet Data Source Parameters, Understanding System Variables Supported as Data Source Parameters.

- If you select *Fixed* as the usage type, you must enter the fixed value.

**Values**

If you select *User Specified* or *Admin Specified* as the usage type, click Values to access the Pagelet Wizard - Specify Data Source Parameter Values page.

**Text**

Use the Personalization Instructions group box to enter custom personalization instructions for the pagelet. These personalization instructions appear on the personalization page of the pagelet.

---

**Note:** Personalization instructions must be translatable.

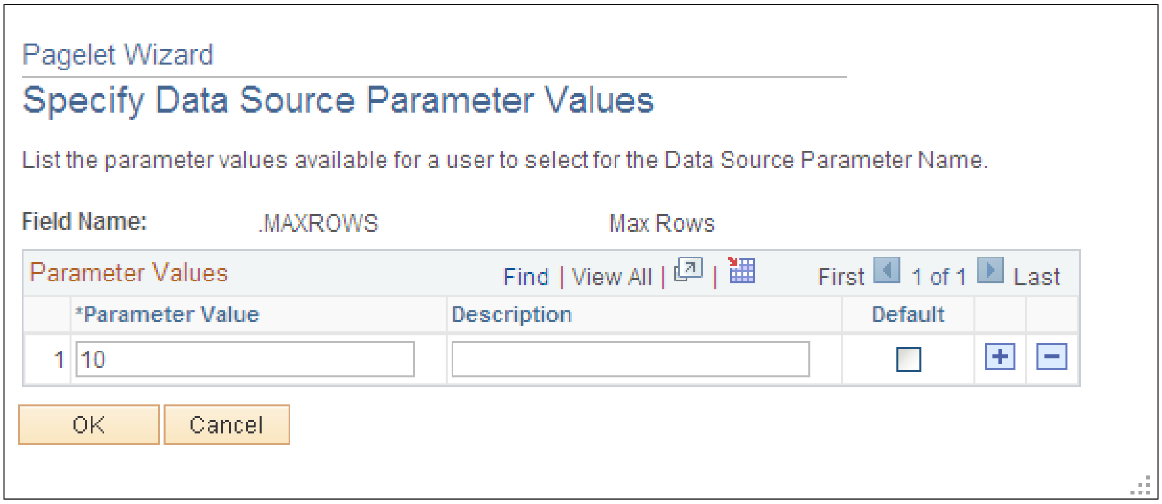
---

### Specifying Prompt Values for Data Source Parameters

**Image: Pagelet Wizard - Specify Data Source Parameter Values page (discussions data source)**

This example illustrates the fields and controls on the Pagelet Wizard - Specify Data Source Parameter Values page (discussions data source). You can find definitions for the fields and controls later on this page.




Use the Pagelet Wizard - Specify Data Source Parameter Values page to specify the prompt values, which are displayed to users when they personalize the pagelet. In addition, specify the default value for the parameter.

| | |
|---|---|
| **Parameter Value** | Specify the parameter value. |
| **Description** | Provide an optional description of the parameter value. |
| **Default** | Select one value as the default value. If the parameter is required, then a default value is required; otherwise, it is optional. |

## Step 4: Selecting a Pagelet Display Format

Access the Pagelet Wizard - Select Display Format page (click the Next button on the Pagelet Wizard - Specify Data Source Parameters page).

Use the Pagelet Wizard - Select Display Format page to specify the data transformation method and display format for the pagelet.

See the product documentation for *PeopleTools: Portal Technology*, “Using Pagelet Wizard to Create and Manage Pagelets,” Step 4: Selecting a Pagelet Display Format.

## Step 5: Specifying Pagelet Display Options

Access the Pagelet Wizard - Specify Display Options page (select *Custom* as the display format and click the Next button on the Pagelet Wizard - Select Display Format page}.

Use the Pagelet Wizard - Specify Display Options page to enter the custom formatting details for the pagelet as well as header and footer options, and to preview the pagelet.

**Note:** If you are modifying an existing pagelet definition or if you modify data source parameter definitions, you might need to reselect the XSL template, regenerate the XSL, or both to have the modified pagelet display actual data.

See the product documentation for *PeopleTools: Portal Technology*, "Using Pagelet Wizard to Create and Manage Pagelets," Step 5: Specifying Pagelet Display Options.

### Step 6: Specifying Pagelet Publication Options

Access the Pagelet Wizard - Specify Publishing Options page (click the Next button on the Pagelet Wizard - Specify Display Options page).

Use the Pagelet Wizard - Specify Publishing Options page to specify the type of pagelet that you want to publish. In addition, provide registration, caching, and security details, and register the pagelet.

See the product documentation for *PeopleTools: Portal Technology*, "Using Pagelet Wizard to Create and Manage Pagelets," Step 6: Specifying Pagelet Publication Options.

## Manage Forum - Publish as Pagelet Page

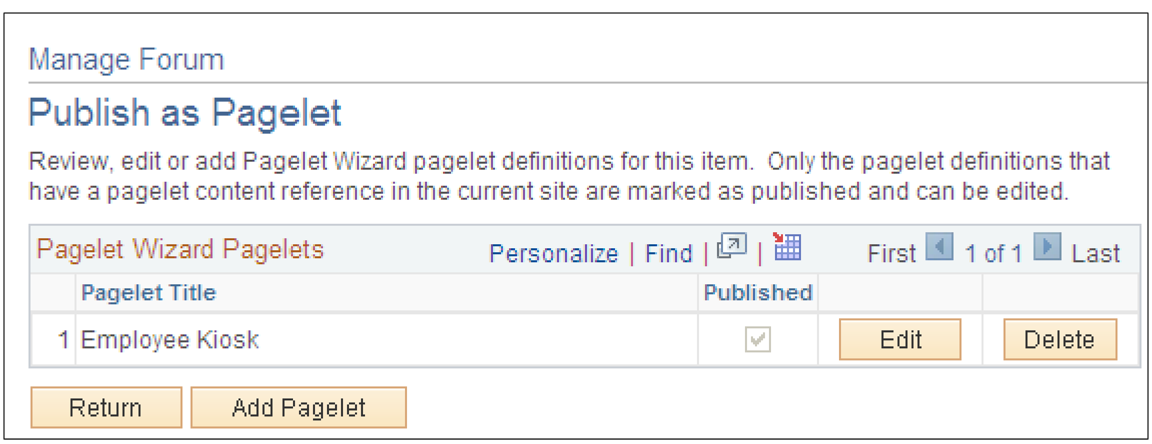
Use the Manage Forum - Publish as Pagelet page (EPPPB_PGLT_LST) to administer pagelet definitions for a discussion forum.

**Navigation**

- Click the Publish button on the Manage Forum - Publish Pagelet Wizard Definition page.
- If this discussion forum has already been published as a pagelet, click the Publish as Pagelet link on the Manage Forum page.

**Image: Manage Forum - Publish as Pagelet Page**

This example illustrates the fields and controls on the Manage Forum - Publish as Pagelet Page. You can find definitions for the fields and controls later on this page.




Use the Manage Forum - Publish as Pagelet page to review, edit, or add Pagelet Wizard pagelet definitions for this discussion forum. To edit a pagelet definition, it must be marked as published and have a content reference in the current site.

**Note:** Pagelets for this discussion forum published directly from Pagelet Wizard also appear in this list.

**Edit** Displays the Manage Forum - Publish Pagelet Wizard Definition page on which you can make changes to the pagelet definition.

**Delete** Deletes this pagelet definition and the published pagelet content references in all sites.

**Add Pagelet** Adds a new pagelet definition based on the current discussion forum.

## Publish to Multiple Portals Page

Use the Publish Multiple Pagelets page (PTPP_PMPUBPGLT) to publish multiple pagelet definitions to another portal or site.

**Navigation**

- On the Publish to Multiple Portals page, select Publish Multiple Pagelets.
- Portal Administration, Pagelets, Publish Pagelets, Publish Multiple Pagelets
- PeopleTools, Portal, Portal Utilities, Publish Pagelets, Publish Multiple Pagelets

Two pages are available for you to publish pagelets to multiple portals:

- Use the Publish to Multiple Portals page to publish the pagelet definition to additional portals and sites.
- Use the Publish Multiple Pagelets page to publish multiple pagelet definitions to another portal or site.

See the product documentation for *PeopleTools: Portal Technology*, "Working With Navigation Pages," Publishing Pagelets.

# Using Discussion Forum Alerts and Notifications

This topic discusses subscribing and updating discussion forum alerts and sending email notifications to forum participants.

## Pages Used for Discussion Forum Alerts and Notifications

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| Add Alert Subscription Page | EPPAN_ALERTS | Create subscriptions for email alerts for the discussion forum. |
| Update Alerts Subscription Page | EPPAN_ALERTS | Update existing alert subscriptions for the discussion forum. |
| Notify Members Page | EPPCW_MBNOTIFY | Compose and send an email message to the discussion forum participants. |

## Understanding Discussion Forum Alerts and Notifications

You can create personal alert subscriptions at the discussion forum level and at the discussion topic level. In addition, any forum participant can send notifications to selected forum members from any discussion forum post.

Prior to creating any alerts, discussion forum alerts must be enabled on the Alert Setup page. In addition, for alerts to be delivered to subscribers, alert notifications need to be scheduled by the portal administrator.

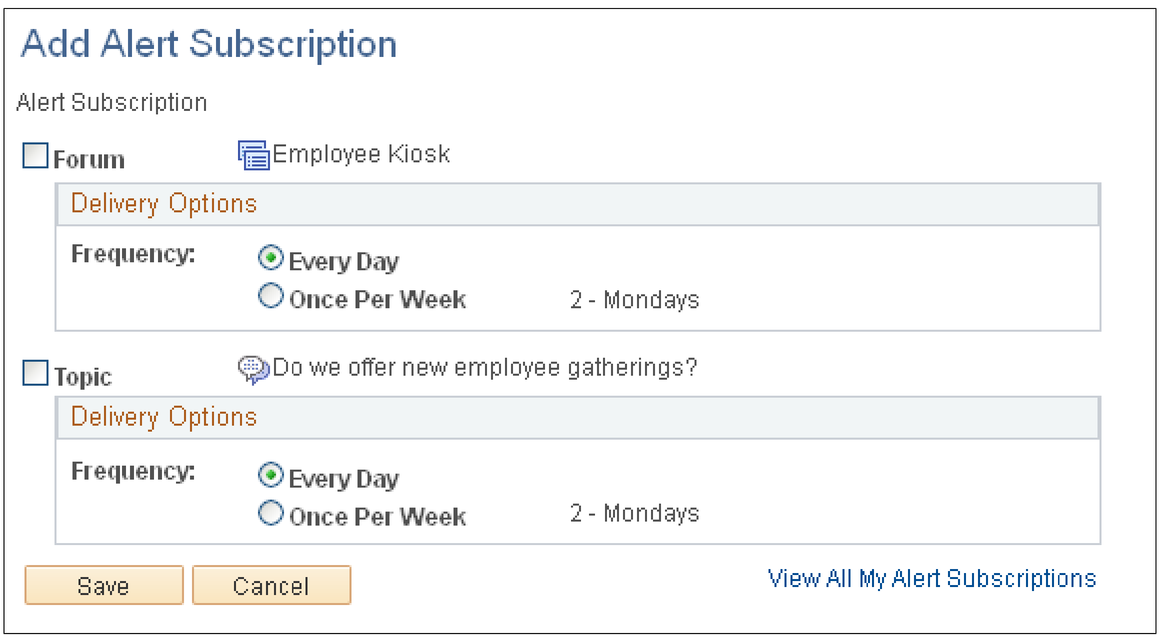
### Related Links

"Alerts Setup Page" (PeopleSoft Interaction Hub 9.1: Portal and Site Administration)
"Scheduling Alert Notifications" (PeopleSoft Interaction Hub 9.1: Portal and Site Administration)

## Add Alert Subscription Page

**Image: Add Alert Subscription Page (topic level view)**

The following example illustrates the Add Alert Subscription page. Access the Add Alert Subscription page (when an alert has not been defined for this forum, click the Alerts link on the discussion forum homepage or click the Alerts link on the Post Details page).




Use the Add Alert Subscription page to create subscriptions for email alerts for the discussion forum.

| | |
|---|---|
| **Forum** | Select this option to subscribe to an email alert at the discussion forum level. |
| **Topic** | Select this option to subscribe to an email alert at the discussion topic level.<br><br>**Note:** This option is available only when accessing this page from the Post Details page. |

**Frequency**

Select the notification frequency:

- *Every Day* — Select to have an email alert sent to you each day that an update occurs.
- *Once Per Week* — Select to have an email alert sent to you once a week during a week in which an update occurs.

  In addition, select the day of the week in the adjacent drop-down list box.

**View All My Alert Subscriptions**

Click to view the My Alerts page.

### Related Links

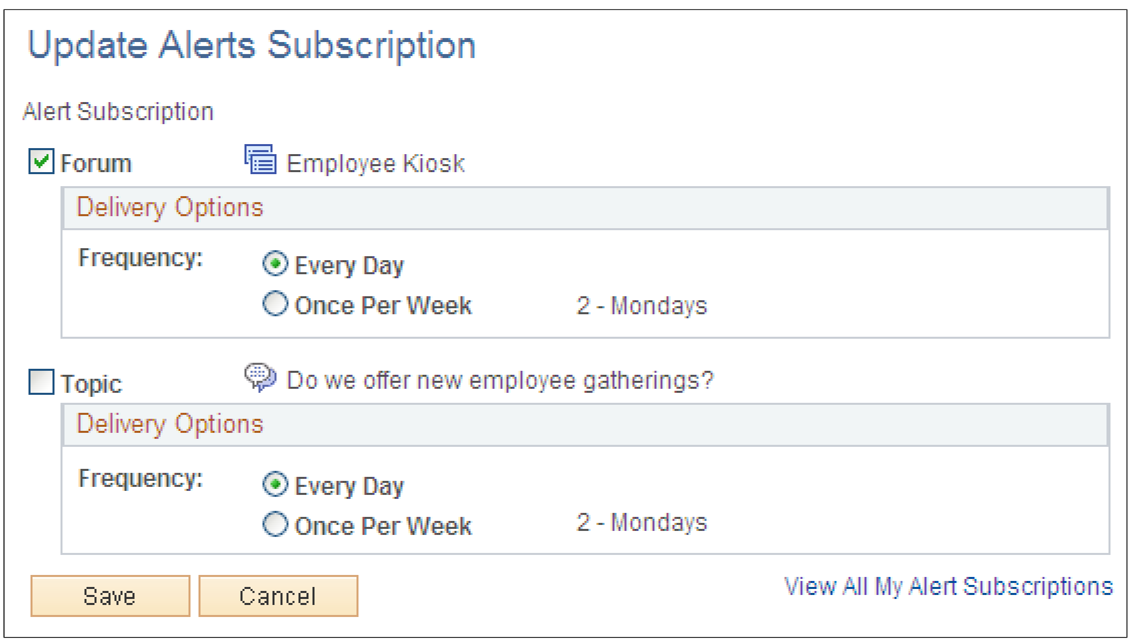
Maintaining Alert Subscriptions

## Update Alerts Subscription Page

Access the Update Alerts Subscription Page (when an alert has already been defined for this forum, click the Alerts link on the discussion forum homepage or click the Alerts link on the Post Details page).

**Image: Update Alerts Subscription page (topic level)**

The following example illustrates the Update Alerts Subscription page (topic level).




Use the Update Alerts Subscription page to update subscriptions for email alerts for the discussion forum.

**Forum**

Select this option to subscribe to an email alert at the discussion forum level.

**Topic**

Select this option to subscribe to an email alert at the discussion topic level.

---
**Note:** This option is available only when accessing this page from the topic level within the forum.

---

**Frequency**

Select the notification frequency:

- *Every Day* — Select to have an email alert sent to you each day that an update occurs.
- *Once Per Week* — Select to have an email alert sent to you once a week during a week in which a update occurs.

  In addition, select the day of the week in the adjacent drop-down list box.

**View All My Alert Subscriptions**

Click to view the My Alerts page.

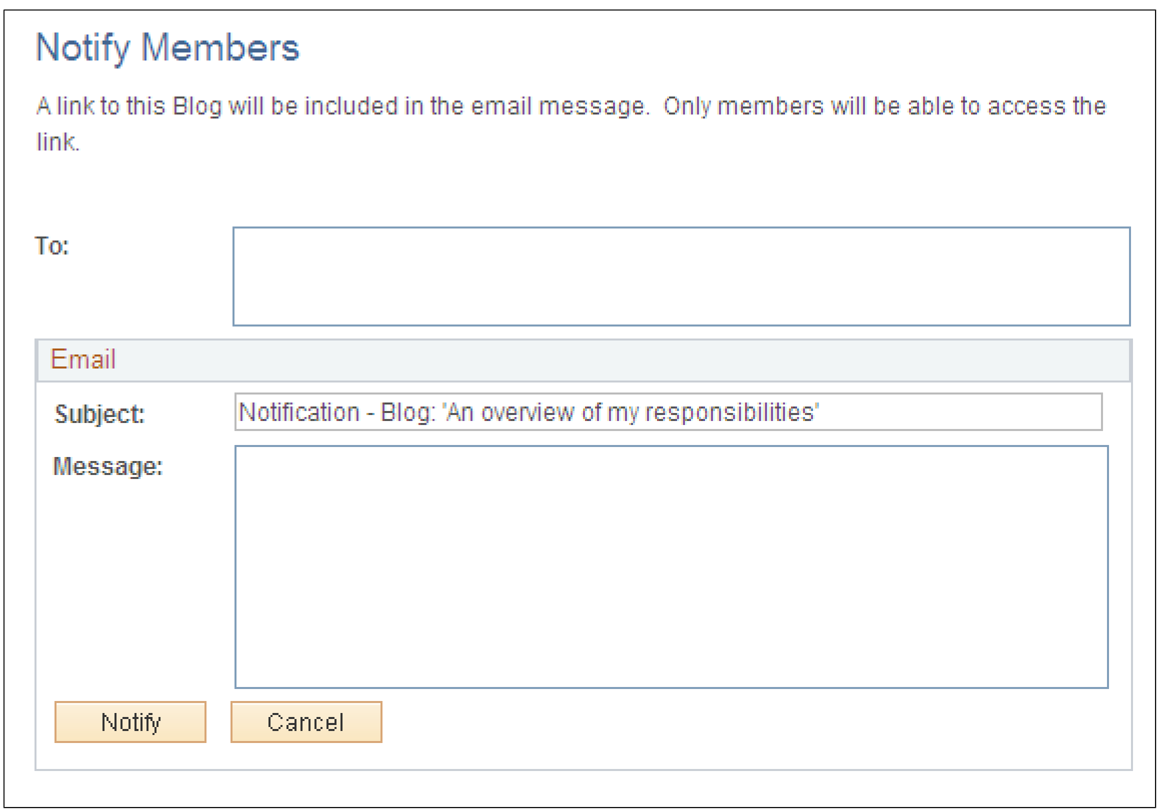
### Related Links

Maintaining Alert Subscriptions

## Notify Members Page

**Image: Notify Members page**

The following example illustrates the Notify Members page. Access the Notify Members page (click the Notify button on the Post Details page).



Use the Notify Members page to compose and send an email message to discussion forum participants. The To field is automatically populated with addresses for all members of the discussion forum who have defined an email address in their system profile.

**Note:** The email will contain a link to the discussion forum. Only members of the discussion forum will be able to access the forum through the link.

| | |
|---|---|
| **To** | Enter additional email addresses for forum participants separated by commas. |
| **Subject** | Enter a subject for the email. |
| **Message** | Enter the message text for your email. |
| **Notify** | Click to send the notification. |

# Performing Searches Within Discussion Forums

This section provides an overview of searching within discussion forums and describes how to search within discussion forums.

## Pages Used to Search Within Discussion Forums

| *Page Name* | *Definition Name* | *Usage* |
|---|---|---|
| Search Discussion Forums Page | EPPSR_SEARCH | Perform a search across all discussion forums or across all portals. |
| Global Search | PTSF_GLOBAL_SEARCH | Perform a search across all discussion forums and portals.<br><br>See Global Search. |

## Understanding Searching Within Discussion Forums

You can search for items within a discussion forum in two ways:

- Using the Search link on pages within the discussion forum.

  The Search Discussion Forums page allows you to search across all discussion forums and across all portals.

- Using the Search field of Global Search in the portal header.

  The *Discussions* search group allows you to search across all discussion forums and portals.

## Search Discussion Forums Page

Use the Search Discussion Forums page (EPPSR_SEARCH) to perform a search across all discussion forum and across all portals.

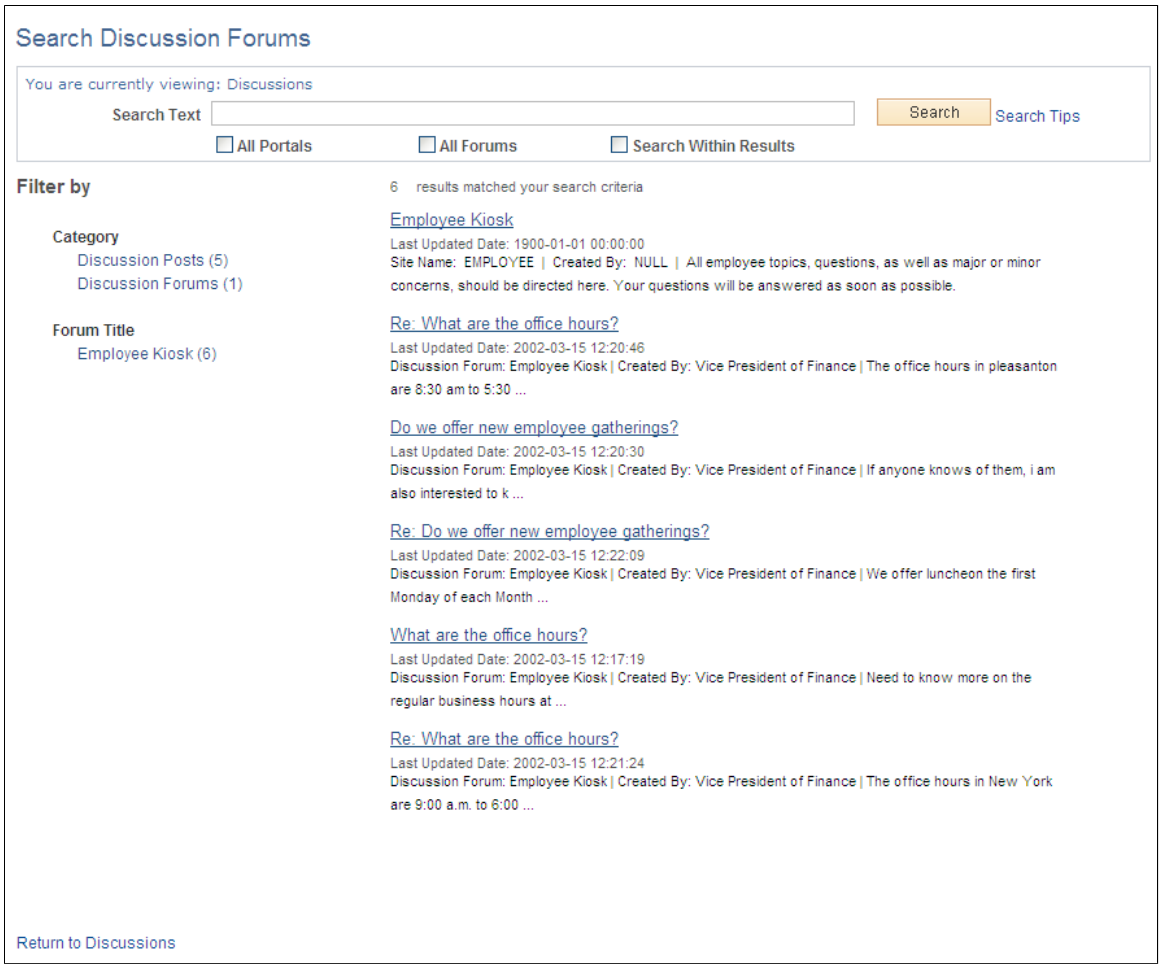
 

### Navigation

- Click the Search link on the discussion forum homepage.
- Click the Search link on the Post Details page.
- Click the Search Discussions link in the Discussion Forums pagelet.

### Image: Search Discussion Forums page

This example illustrates the fields and controls on the Search Discussion Forums page. You can find definitions for the fields and controls later on this page.




Use the Search Discussion Forums page to perform a search across all discussion forum and all portals.

---

**Note:** When you select a forum and click the Search link on the selected forum page, the search scope defaults to the current forum.

---

| | |
|---|---|
| **Search Text** | Enter the search criteria.<br><br>**Note:** Do not use blank or * (asterisk); these are not valid search criteria. |

| | |
|---|---|
| **Search Tips** | Click to display search syntax and examples on the Search Tips page. |
| **All Portals** | Select to search across all portals. |
| **All Forums** | Select to search across all discussion forums of which you are a member. |
| **Search Within Results** | Select to search within the search results. |
| **Search** | Click to perform the search. |
| **Filter by** | This is the facet pane, which is the area to the left of the search results. Use the facets to filter the search results and drill down closer to the desired information.<br>*Category* — Select a category to filter the search by the selected category.<br>*Portal Name* — Select a portal to filter the search by the selected portal.<br>**Note:** The Portal Name facet is unavailable if the Site Specific check box in the Discussion Forums group box is not selected.<br>See "Defining Installation Options" (PeopleSoft Interaction Hub 9.1: Portal and Site Administration).<br>*Forum Title* — Select a title to filter the search by the selected forum title. |
| **Return to <Discussions\| Post Details>** | If the search originated from a particular discussion forum, click to return to that forum or post. |

# Working With the Discussion Forums Pagelet

This topic discusses how to personalize and use the Discussion Forums pagelet.

## Page Used to Personalize the Discussion Forums Pagelet

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| Personalize Discussion Forums Page | EPPDF_USER_PREF | Select the discussion forums and options for display in your Discussion Forums pagelet. |

## Understanding the Discussion Forums Pagelet

The Discussion Forums pagelet lists discussion forums, topics, and replies. If you do not personalize the Discussion Forums pagelet, the pagelet displays the first 10 forums to which you have access, including those forums created with the *Show by Default for All Users* option selected, with three topics per forum and three replies per topic. In wide format, the pagelet also provides identification of the author of a topic or reply, as well as the date of the post. In narrow format, the pagelet does not provide this additional information.

## Personalize Discussion Forums Page

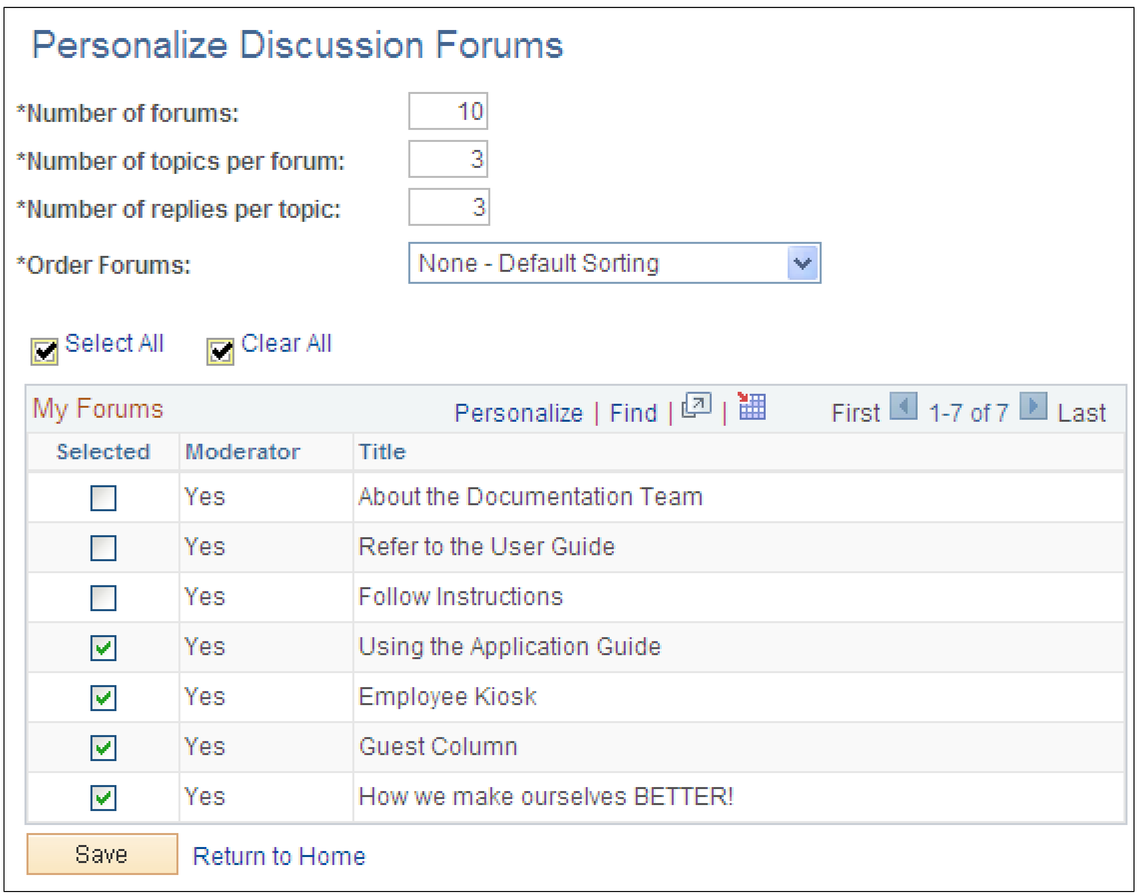
Use the Personalize Discussion Forums page (EPPDF_USER_PREF) to select the discussion forums and options for display in your Discussion Forums pagelet.

**Navigation**

Click the Customize button in the Discussion Forums pagelet.

**Image: Personalize Discussion Forums Page**

The following example illustrates the Personalize Discussion Forums page.




Use the Personalize Discussion Forums page to select the discussion forums and options for display in your Discussion Forums pagelet.

| | |
|---|---|
| **Number of Forums** | Enter the maximum number of discussion forums you want to display in the pagelet. The default value is 10. The maximum number is 99. |

| | |
|---|---|
| **Number of topics per forum** | Enter the maximum number of topics that you want to display per forum in the pagelet. The default value is 3. The maximum number is 99. |
| **Number of replies per topic** | Enter the maximum number of replies you want to display per topic in the pagelet. The default value is 3. The maximum number is 99,999. |
| **Order Forums** | Select one of the following:<br>• *Alphabetically - Ascending* — Select to sort by forum title in ascending order.<br>• *None - Default Sorting* — Select to have no sort order. This is the default.<br>• *Time Ascending* — Select to sort by date and time of creation in ascending order.<br>• *Time Descending* — Select to sort by date and time of creation in descending order.<br>• *User Defined* — Select to order explicitly by number. An Order of Appearance column appears in the My Forums grid. |
| **Select All** | Select to select all discussion forums. |
| **Clear All** | Select to clear all selected discussion forums. |
| **Selected** | Select the discussion forums you want to display on the pagelet. |

## Discussion Forums Pagelet

**Image: Discussion Forums pagelet**

The following example illustrates the Discussion Forums Pagelet. Access the Discussion Forums Pagelet on the portal homepage as shown below.


Use the Discussion Forums pagelet to access and manage discussion forums, topics, and replies.

Click the Create a Topic button to access the Create New Topic page within the corresponding discussion forum.

**<Discussion Forum>**

Click a discussion forum link to access the discussion forum's homepage on which you can view details about the forum.

The hover text of the discussion forum link displays the description of the discussion forum.

**<Topic Title>**

Click a topic link to access the Post Details page on which you can view details about the topic.

**<Reply Title>**

Click a reply link to access the Post Details page on which you can view details about the reply.

**Create Forum**

Click to access the Create Forum page from which you can create a new discussion forum. This link displays for portal administrators only.

**Administer Forums**

Click to access to the Administer Discussion Forums page for all discussion forums. This link displays for portal administrators only.

**My Forums**

Click to access to the My Discussion Forums page.

**Search Forums**

Click to access the Search Discussion Forums page on which you can perform a search of text in the discussion forums to which you belong.


Hover over any of these to view the list of feeds published for all discussion forums. 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.

See Viewing and Subscribing to Feeds.

# Working With the Discussion Posts Pagelet

This section provides an overview of the Discussion Posts pagelet and discusses how to:

- Personalize the Discussion Posts pagelet.
- Use the Discussion Posts pagelet.

## Page Used to Personalize the Discussion Posts Pagelet

| *Page Name* | *Definition Name* | *Usage* |
| --- | --- | --- |
| Personalize Discussion Posts Page | PTPPB_USER_PREF | Specify the number of posts to display in your Discussion Posts pagelet. |

## Understanding the Discussion Posts Pagelet

The Discussion Posts pagelet provides information from workspace discussions only. This pagelet can be deployed in a fashion similar to other pagelets on homepage tabs, dashboard pages, or WorkCenter pages.

The Discussion Posts pagelet lists topics and replies from workspace discussions to which you have access. If you do not personalize the Discussion Posts pagelet, the pagelet displays the last five topics or replies from workspace discussion to which you have access.

## Personalize Discussion Posts Page

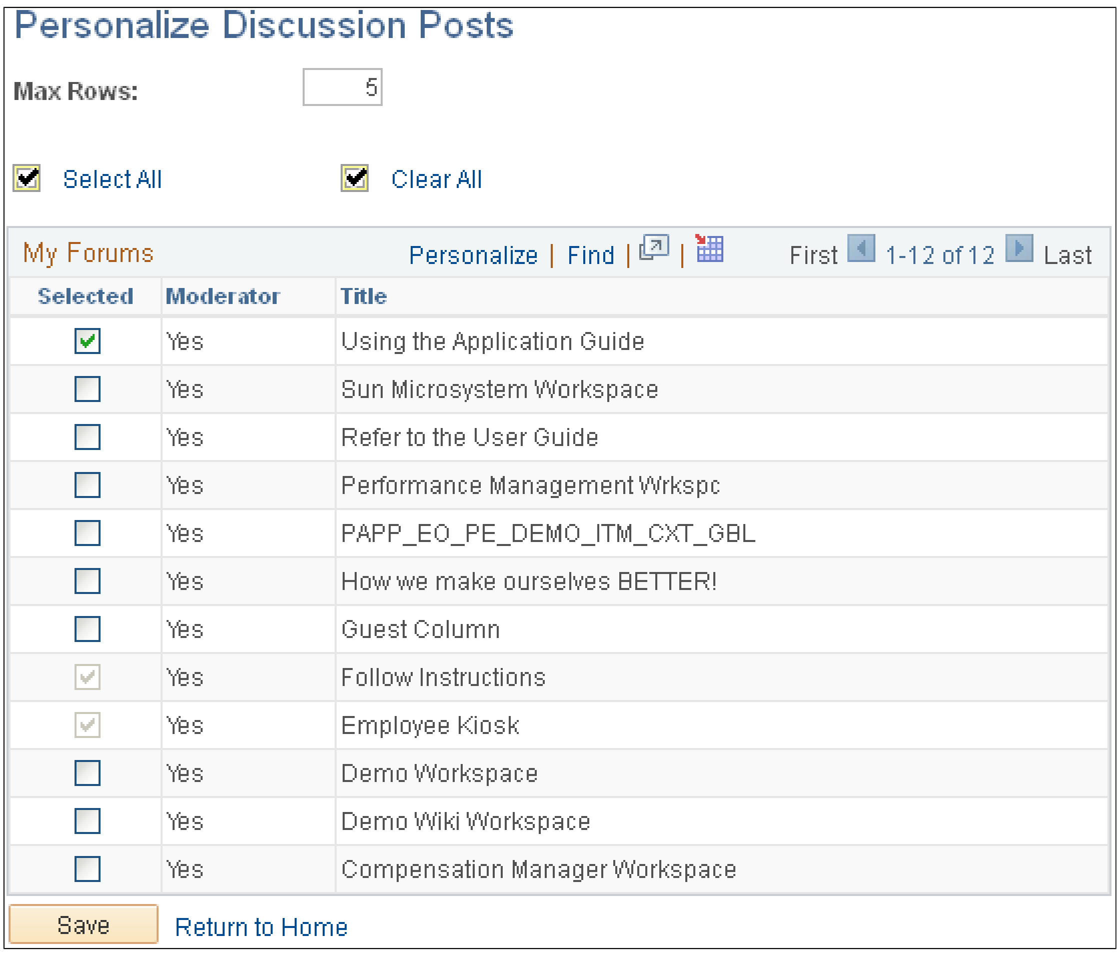
Use the Personalize Discussion Posts page (PTPPB_USER_PREF) to specify the number of posts to display in your Discussion Posts pagelet.

**Navigation**

Click the Customize button in the Discussion Posts pagelet.

**Image: Personalizing Your Discussion Posts Pagelet Page**

The following example illustrates the Personalize Discussion Posts page. Access the Personalize Discussion Posts page (click the Customize icon in the Discussion Posts pagelet).



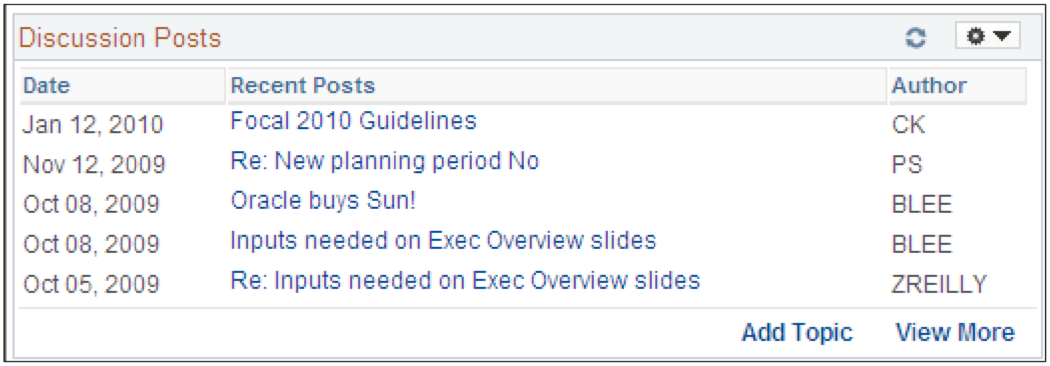

Use the Personalize Discussion Posts page to specify the number of posts to display in your Discussion Posts pagelet.

| | |
|---|---|
| **Max Rows** | Enter the maximum number of discussion posts you want to display in the pagelet. The default value is 5. |

## Discussion Posts Pagelet

**Image: Discussion Posts pagelet**

The following example illustrates the Discussion Posts Pagelet. Access the Discussion Posts Pagelet on the homepage, dashboard, or WorkCenter page where it has been deployed.




Use the Discussion Posts pagelet to access topics and replies from workspace discussions. The posts are displayed in the pagelet in reverse chronological order from most recent to the oldest post.

| | |
|---|---|
| **Recent Posts** | Click the link for a post to open a new window displaying the Post Details page on which you can view details about the topic or reply. The Post Details displays within the Discussions module of the corresponding workspace. |
| **Add Topic** | Click the Add Topic button to access a list of workspaces to which you can add a discussion topic. Click an item in the list to open a new window displaying the Create New Topic page within the corresponding workspace. |
| **View More** | Click the View More button to access a list of workspaces to which you have access. Click an item in the list to open a new window displaying the workspace Discussions module, which lists the discussion topics for that workspace.<br><br>**Note:** If the total number of discussion posts available is less than the maximum value specified on the Personalize Discussion Posts page, then the View More button is not displayed. |

# Publishing and Using a Forum Posts Pagelet

This topic discusses how to configure, personalize and work with a forum posts pagelet.

## Pages Used to Work With the Configure Forum Posts

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| Configuring a Forum Posts Pagelet | PTPPB_ADMIN_PREF | Specify whether an administrator-specified forum is to be displayed in the forum posts pagelet. |
| Personalizing a Forum Posts Pagelet | EPPDF_POST_PREF | Select the forum posts and options for display in your Forum Posts pagelet. |

## Publishing a Forum Posts Pagelet Using Pagelet Wizard

Pagelets for forums posts can be created and published using Pagelet Wizard. This section provides an overview of how to use Pagelet Wizard to complete the following six steps:

- Step 1: Entering Pagelet Identifying Information.
- Step 2: Selecting a Pagelet Data Source.
- Step 3: Specifying Data Source Parameters.
- Step 4: Selecting a Pagelet Display Format.
- Step 5: Specifying Pagelet Display Options.
- Step 6: Specifying Pagelet Publication Options.

Where appropriate, this section provides details specific to using Pagelet Wizard to publish forum posts as a pagelet. The product documentation for PeopleTools 8.53 provides detailed information on using Pagelet Wizard.

See *PeopleTools: Portal Technology* “Using Pagelet Wizard to Create and Manage Pagelets.”

### Step 1: Entering Pagelet Identifying Information

Use the Pagelet Wizard - Specify Pagelet Information page to identify and categorize a pagelet.

**Navigation**

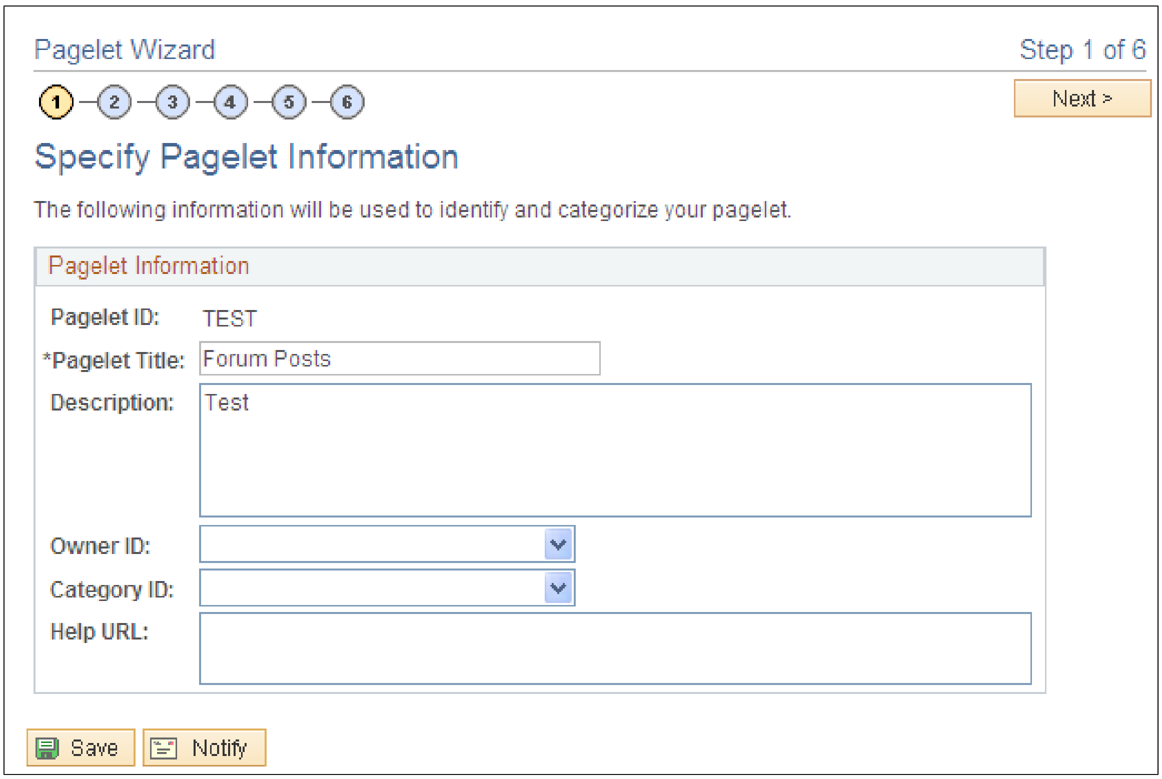
1. Click Portal Administration, Pagelet Wizard, Pagelet Wizard.
2. Select the Add a New Value tab if you are adding a new pagelet.

   Or

   Select the Find an Existing Value tab and then click Search.

**Image: Pagelet Wizard - Specify Pagelet Information page (Forum Posts data type)**

This example illustrates the fields and controls on the Pagelet Wizard - Specify Pagelet Information page (Forum Posts data type).




| | |
|---|---|
| **Pagelet ID** | Specifies the ID of the pagelet. |
| **Pagelet Title** | Specifies the title of the Forum Posts pagelet. |
| **Description** | Describes the pagelet. |
| **Owner ID** | Specifies the value that is used to identify pagelets created by the organization. |
| **Category ID** | Enter a Pagelet Wizard pagelet category ID. You can use category IDs to organize Pagelet Wizard pagelets |
| **Help URL** | Specifies the URL of the help document to associate with the pagelet. Entering a URL causes the Help button to appear in the pagelet header bar. |

See the product documentation for *PeopleTools: Portal Technology*, “Using Pagelet Wizard to Create and Manage Pagelets,” Step 1: Entering Pagelet Identifying Information.

## Step 2: Selecting a Pagelet Data Source

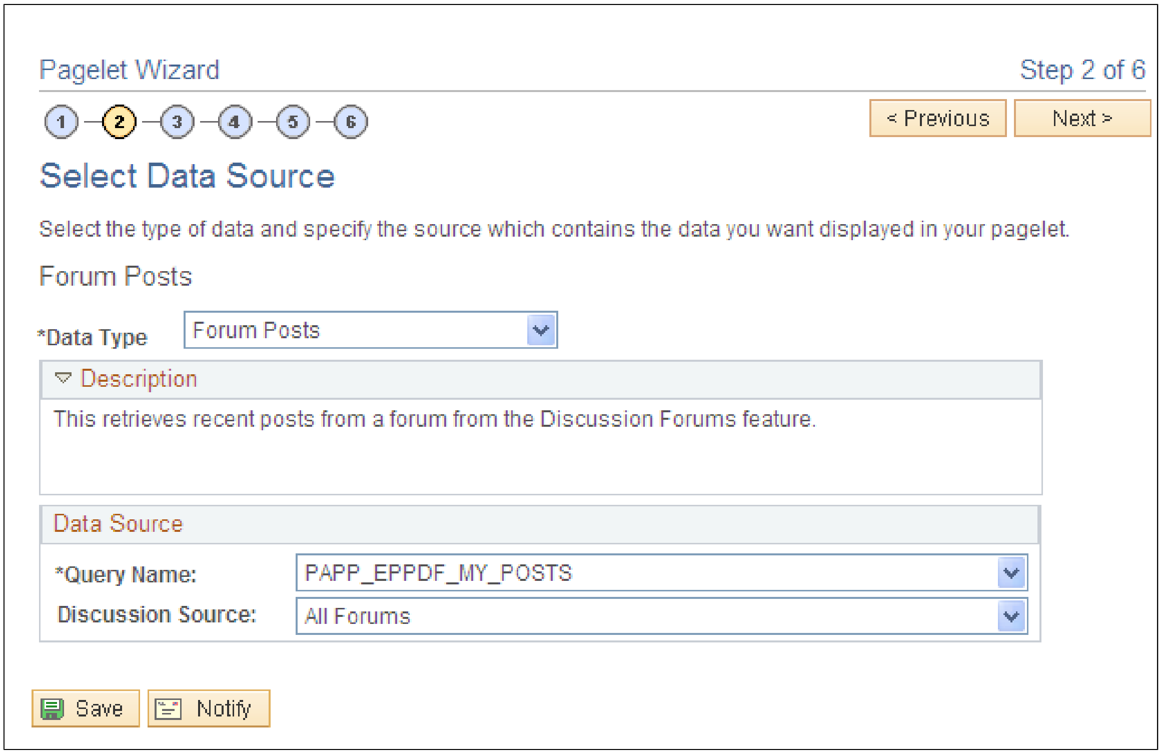
Use the Pagelet Wizard - Select Data Source page to select the Pagelet Wizard data source type.

**Navigation**

Click Next on the Pagelet Wizard - Specify Pagelet Information page.

**Image: Pagelet Wizard - Select Data Source page (Forum Posts data type)**

This example illustrates the fields and controls on the Pagelet Wizard - Select Data Source page (Forum Posts data type).




| | |
|---|---|
| **Data Type** | Specifies the data type that you would want to display in the pagelet.<br><br>Select *Forum Posts* to display forum posts. |
| **Query Name** | Select *PAPP_EPPDF_MY_POST*. |
| **Discussion Source** | Specifies the source of the discussions. Select any one of the following discussion sources:<br><br>• *All Forums:* Choose this to include the posts from all forums (portal forums, workspace forums, and related discussion forums).<br><br>• *All Forums (No Related Disc):* Select this option to include posts from all portal forums and all workspace forums while excluding posts from all related discussions.<br><br>• *All Related Discussions:* Choose this to include the posts from all the related discussion forums only. |

*Workspace Forums:* Choose this to include the posts from all workspace forums only.

## Step 3: Specifying Data Source Parameters

Use the Pagelet Wizard - Specify Data Source Parameters page to configure the data source parameters that are required for data to be displayed in the pagelet.

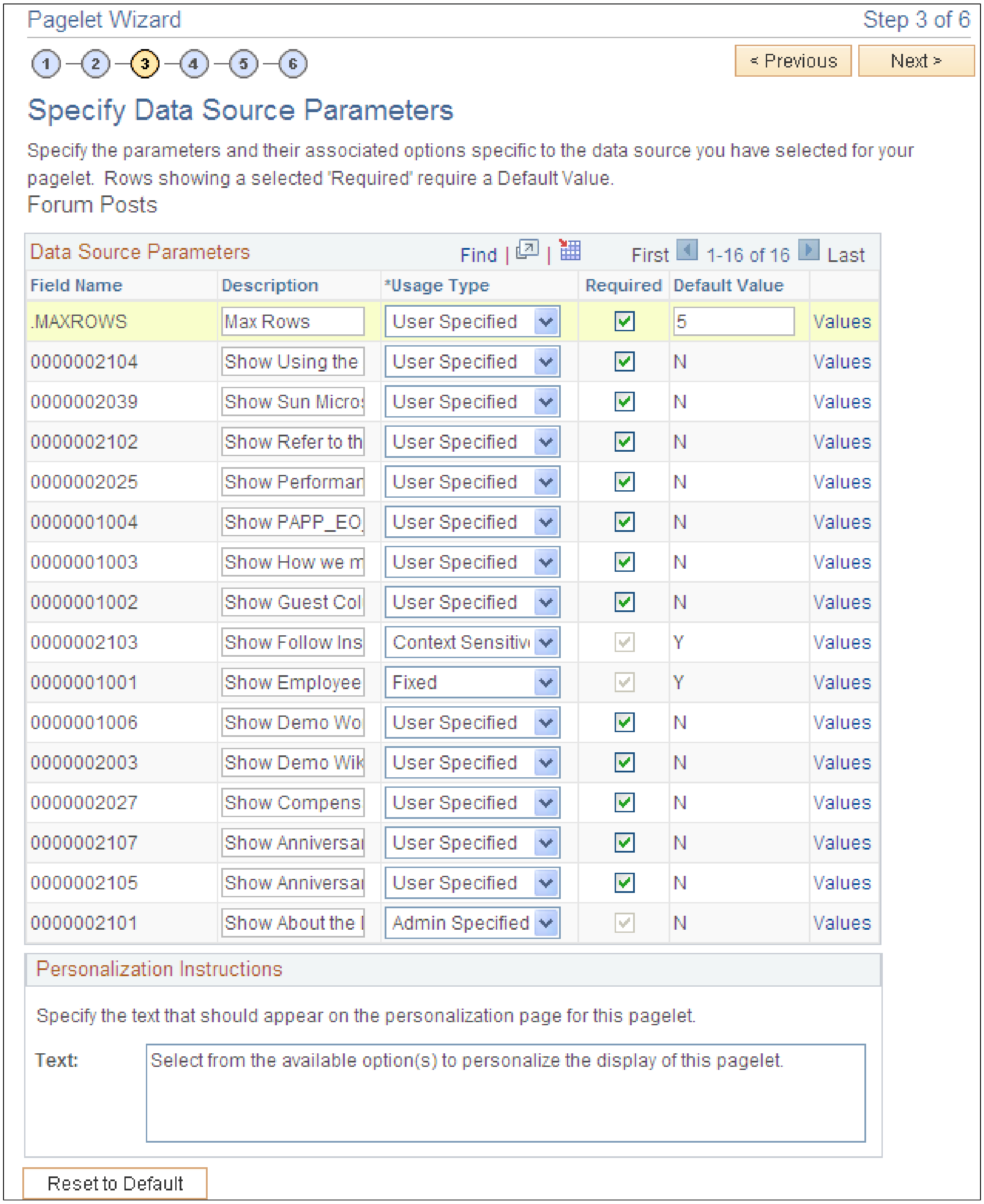
 

### Navigation

Click Next on the Pagelet Wizard - Select Data Source page.

**Image: Pagelet Wizard - Specify Data Source Parameters (Forum Posts data type)**

This example illustrates the fields and controls on the Pagelet Wizard - Specify Data Source Parameters (Forum Posts data type).




**Field Name**

Displays the name of the data source parameter.

For discussion forums, the following data source parameters can be defined:

- MAXROWS — Limits the number of entries displayed in the pagelet
- An additional data source parameter is displayed for each forum matching the Discussion Source criteria specified in Step 2. Field Name displays the FORUM_ID. For example: 0000001002.

**Description**

Displays a description of the data source parameter.

An additional data source parameter is displayed for each forum matching the Discussion Source criteria specified in Step 2. Description: displays the label that allows a user to select the forum title. For example: Show Guest Column.

**Usage Type**

Select the type of accessibility that you want to grant for the data source parameter when it appears in the pagelet. Options are:

- *Admin Specified:* Select to enable those users with administrative privileges to specify values for this parameter. When a pagelet includes an administrator-specified parameter, the Configure link appears in the pagelet for administrators to configure those parameters on behalf of all users.

  For forums specified as *Y,* the forum will be displayed by default in the pagelet. For forums specified as *N,* the forum will not be displayed by default in the pagelet. In either case, the forum will be listed on the configure page, allowing the administrator to change the setting.

- *Fixed:* Select to enter a fixed value for the data source parameter that the end user cannot modify.

  For forums specified as *Y,* the forum will be displayed by default in the pagelet. The forum will also be listed on the personalize page and the configure page, but the setting will not be changeable. For forums specified as *N,* the forum will neither be displayed in the pagelet, on the personalize page, nor on the configure page.

- *User Specified:* Select to enable end users to specify a value for this parameter. When a pagelet contains a user-specified parameter, the Personalize link appears on the pagelet title bar.

  End users can click this button to access a personalization page, on which they can select a data source parameter value that they want to use for the pagelet. Users can select a value from a prompt, or they can manually enter their own value if no prompt values are available. Users can see, but not change, parameters configured by an administrative user.

If you change the usage type from or to *User Specified* for a data source parameter on a published homepage pagelet, you must unpublish and then republish the pagelet.

For forums specified as *Y,* the forum will be displayed by default in the pagelet. For forums specified as *N,* the forum will not be displayed by default in the pagelet. In either case, the forum will be listed on the personalize page, allowing the user to change the setting.

**Required**

This check box is selected and disabled for parameters specified as administrator-specified, context-sensitive, fixed, and system variable; otherwise, it is selected but enabled for user-specified parameters.

**Default Value**

You can enter a value that includes the % and * wildcards at the beginning or end of a value in the Default Value field.

Note the following about default values:

- If you select *User Specified* as the usage type and the data source parameter is a required value, you must enter the default value that should appear before a user enters a value. If the data source parameter is not a required value, you do not have to enter a default value.

  If you select a default value when defining prompt values on the Pagelet Wizard - Specify Data Source Parameter Values page, that default value populates this field.

  If you select *User Specified* as the usage type, you can also enter a system variable as the default value. For example, to make the current date the default value for a user-specified parameter, enter a default value of *%Date.*

- If you select *Fixed* as the usage type, you must enter the fixed value.

**Values**

If you select *User Specified* or *Admin Specified* as the usage type, click Values to access the Pagelet Wizard - Specify Data Source Parameter Values page.

**Text**

Use the Personalization Instructions group box to enter custom personalization instructions for the pagelet. These personalization instructions appear on the personalization page of the pagelet.

**Note:** Personalization instructions must be translatable.

### Step 4: Selecting a Pagelet Display Format

Use the Pagelet Wizard - Select Display Format page to specify the data transformation method and display format for the pagelet.

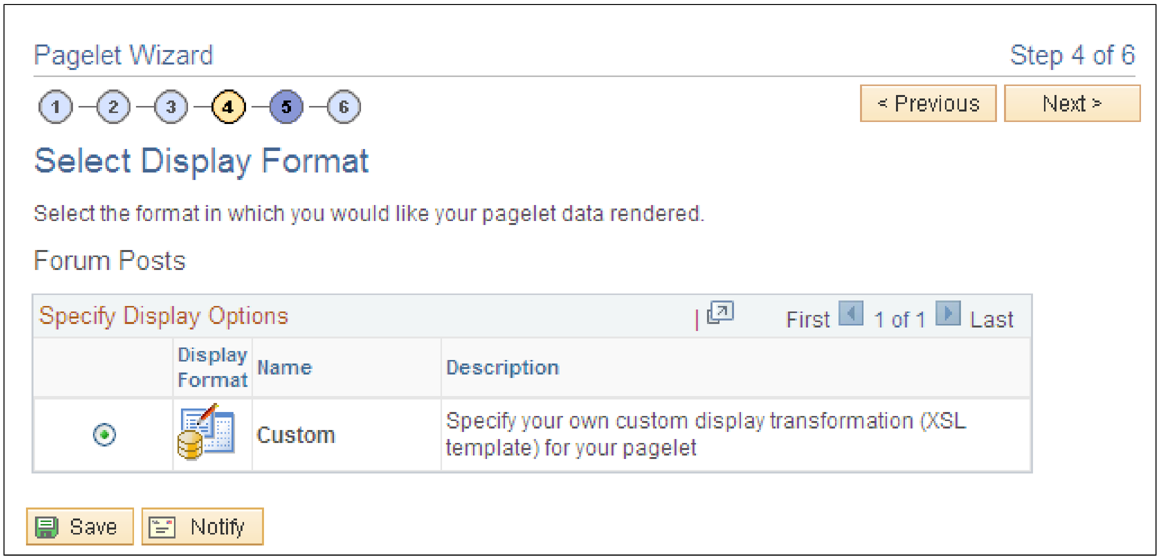
 

**Navigation**

Click Next on the Pagelet Wizard - Specify Data Source Parameters page.

**Image: Pagelet Wizard - Select Display Format page (Forum Posts data type)**

This example illustrates the fields and controls on the Pagelet Wizard - Select Display Format page (Forum Posts data type).




See the product documentation for *PeopleTools: Portal Technology*, "Using Pagelet Wizard to Create and Manage Pagelets," Step 4: Selecting a Pagelet Display Format.

## Step 5: Specifying Pagelet Display Options

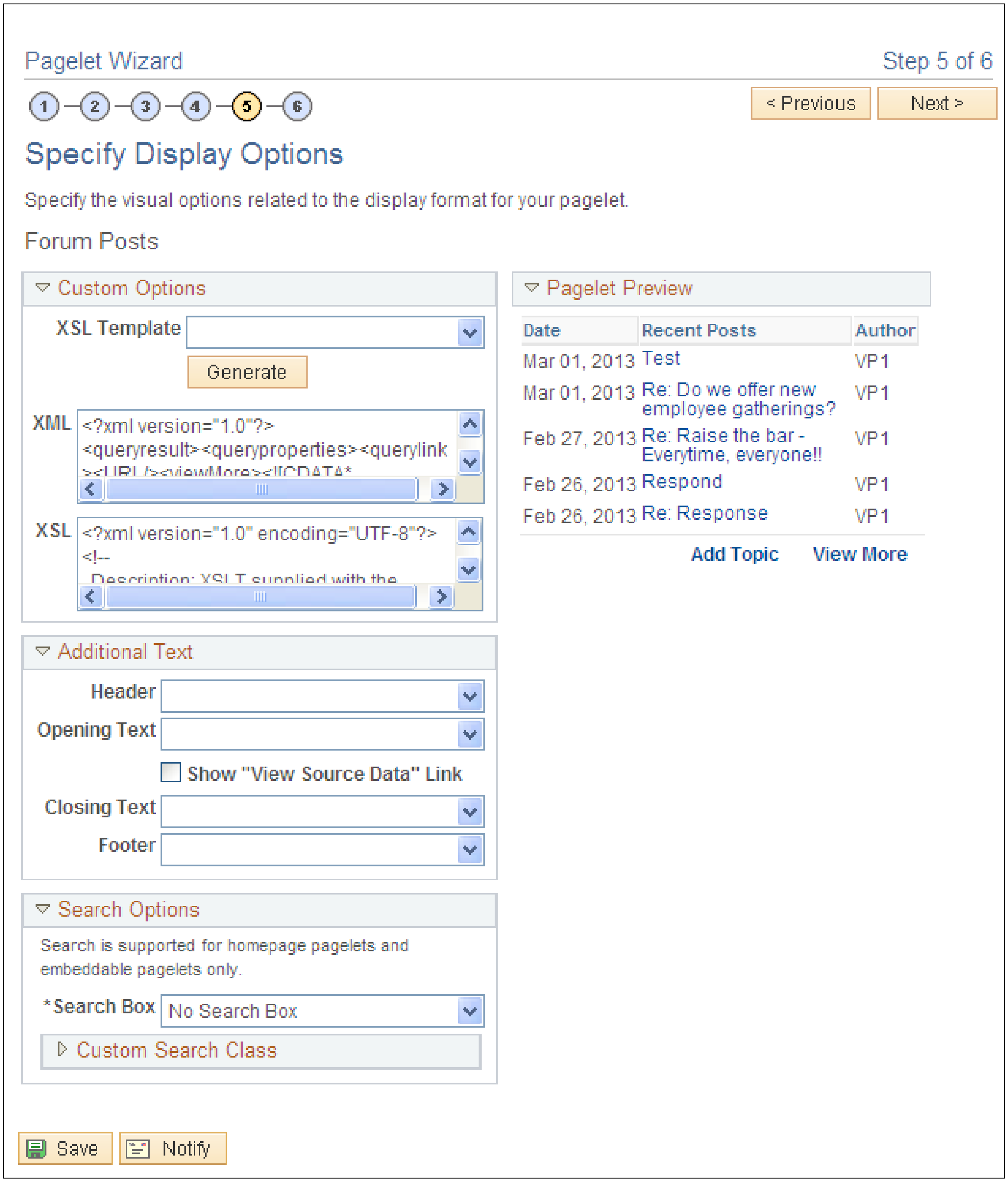
Use the Pagelet Wizard - Specify Display Options page to enter the custom formatting details for the pagelet as well as header and footer options, and to preview the pagelet.

**Navigation**

Click Next on the Pagelet Wizard - Select Display Format page.

**Image: Pagelet Wizard - Specify Display Options page (Forum Posts data type)**

This example illustrates the fields and controls on the Pagelet Wizard - Specify Display Options page (Forum Posts data type).




Expand the Custom Options section and click the *Generate* button and then click Save.

**Note:** If you are modifying an existing pagelet definition or if you modify data source parameter definitions, you might need to reselect the XSL template, regenerate the XSL, or both to have the modified pagelet display actual data.

See the product documentation for *PeopleTools: Portal Technology*, "Using Pagelet Wizard to Create and Manage Pagelets," Step 5: Specifying Pagelet Display Options.

### Step 6: Specifying Pagelet Publication Options

Access the Pagelet Wizard - Specify Publishing Options page (click the Next button on the Pagelet Wizard - Specify Display Options page).

Use the Pagelet Wizard - Specify Publishing Options page to specify the type of pagelet that you want to publish. In addition, provide registration, caching, and security details, and register the pagelet.

See the product documentation for *PeopleTools: Portal Technology*, "Using Pagelet Wizard to Create and Manage Pagelets," Step 6: Specifying Pagelet Publication Options.

## Configuring a Forum Posts Pagelet

Use the Configure Forum Posts page to configure which forum posts appear in the pagelet.

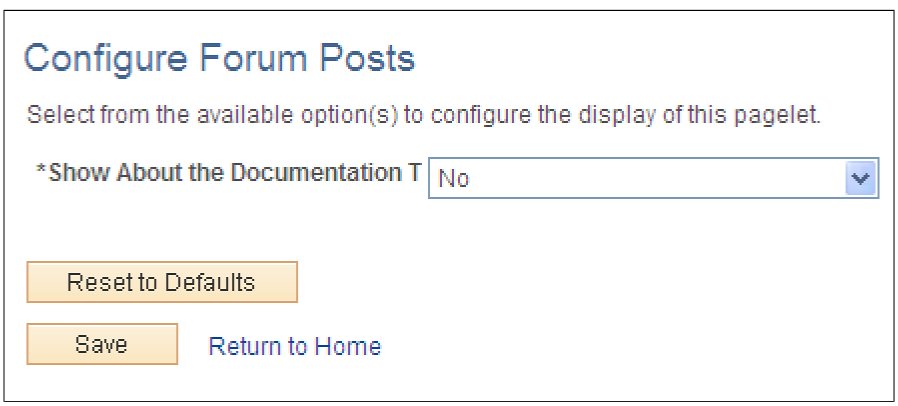
**Note:** An administrative user can configure a forum posts pagelet for all users of the pagelet.

**Navigation**

Click the Configure link on the Forum Posts pagelet.

**Image: Configure Forum Posts page**

This example illustrates the fields and controls on the Configure Forum Posts.




Select Yes or No to determine whether a specific forum is to be displayed in the pagelet for all users of a pagelet. Forums marked as *Admin Specified* in Step 3 of Pagelet Wizard are the only forums that will be displayed on this page.

## Personalizing a Forum Posts Pagelet

Use the Personalize Discussion Posts page to select the display options and the forums to be displayed in your forum posts pagelet.

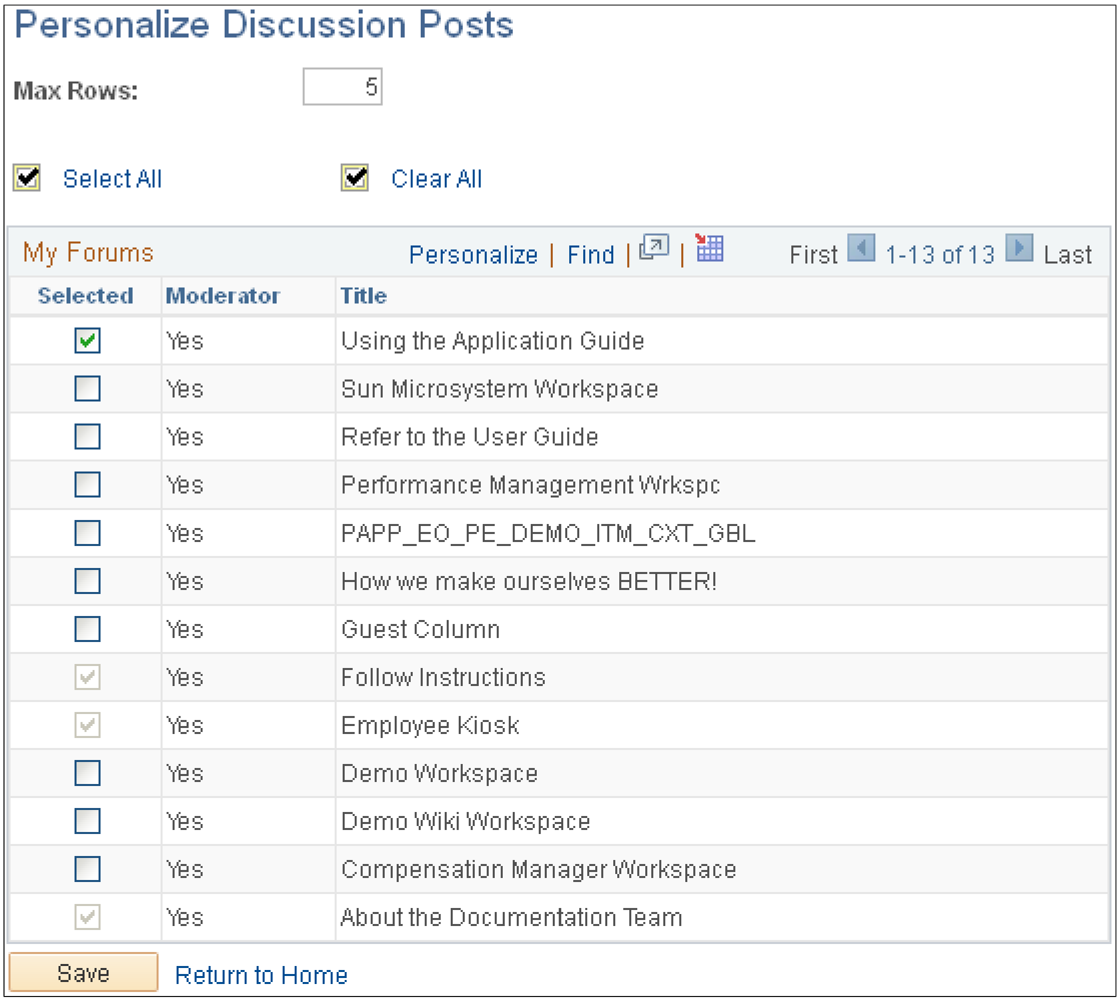
 

**Navigation**

- Click the Pagelet Settings icon on the forum posts pagelet.
- Select Personalize.

**Image: Personalize Forum Posts page**

This example illustrates the fields and controls on the Personalize Forum Posts page.




| | |
|---|---|
| **Max Rows** | Specifies the maximum number of rows you want to display in the forum posts pagelet. The default value is 5. |
| **Selected** | Select the forums that you want to be displayed in the forum posts pagelet. You can also view the response to the post. |

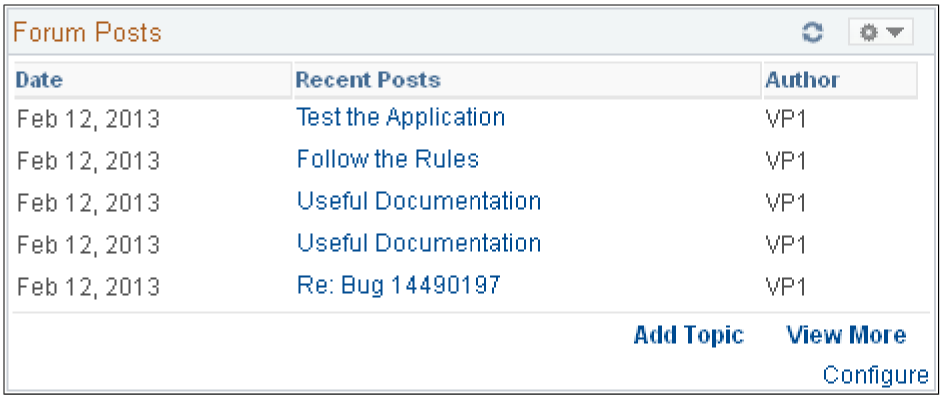
 

## Working With a Forum Posts Pagelet

Use a forum posts pagelet on the portal homepage to access and manage forums posts, topics, and replies.

**Image: Forum posts pagelet**

This example illustrates the fields and controls on a forum posts pagelet.




**Recent Posts**

Click the link for a post to open a new window displaying the Post Details page on which you can view details about the topic or reply.

**Note:** For a workspace forum, the Post Details does not display within the Discussions module of the corresponding workspace.

**Add Topic**

Click the Add Topic button to access a list of forums to which you can add a discussion topic. Click an item in the list to open a new window displaying the Create New Topic page.

**View More**

Click the View More button to access a list of forums to which you have access. Click an item in the list to open a new window displaying the discussion forum’s homepage.

**Note:** If the total number of discussion posts available is less than the maximum value specified on the Personalize Discussion Posts page, then the View More link is not displayed.

**Configure**

Users with administrative privilege can access this link. For more information about configuring a forum posts pagelet, see Configuring a Forum Posts Pagelet

## Chapter 10

# Working With Feeds and Alerts

## Publishing PeopleSoft Interaction Hub Content as a Feed

This section provides an overview of which PeopleSoft Interaction Hub items can be published as a feed and discusses how to publish that content as a feed.

Use the Publish Feed Definition page (PTFP_PUB_AS_FEED) to define feed security options, enter additional feed properties, and access advanced options.

**Navigation**

- Click the Publish as Feed link on the administration page for the item to be published.
- Click the Edit button on the Publish as Feed page.
- Click the Add Feed button on the Publish as Feed page.

Use the Advanced Feed Options page (PTFP_PUB_AS_ADVOPT) to enter advanced option values that are specific to the feed data type.

**Navigation**

Click the Advanced Options link on the Publish Feed Definition page.

Use the Publish as Feed page (PTFP_PUB_AS_LIST) to review, edit, add, or delete feed definitions for this item.

**Navigation**

- When one or more feeds have been defined for this item, click the Publish as Feed link on the administration page for the item.
- Click the Publish button on the Publish Feed Definition page.
- Click the Cancel button on the Publish Feed Definition page.

Use the Publish Feed Definition to Sites page (PTFP_PUB_AS_SITES) to publish an existing feed to other sites.

**Navigation**

Click the Publish Feed to Other Sites link on the Publish Feed Definition page.

Use the Define Feed Data Types page (PTFP_DATATYPE) to define feed data types and publish the list of feeds for that type.

**Navigation**

PeopleTools, Feeds, Define Feed Data Types

## Pages Used to Publish PeopleSoft Interaction Hub Content as a Feed

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| Publish Feed Definition Page | PTFP_PUB_AS_FEED | Define feed security options, enter additional feed properties, and access advanced options.<br><br>See *PeopleSoft CRM: Automation and Configuration Tools*, "My Worklist - Publish Feed Definition Page". |
| Advanced Feed Options Page | PTFP_PUB_AS_ADVOPT | Enter advanced option values that are specific to the feed data type.<br><br>See*PeopleSoft CRM: Automation and Configuration Tools*, "My Worklist - Advanced Feed Options Page". |
| Publish as Feed Page | PTFP_PUB_AS_LIST | Review, edit, add, or delete feed definitions for this item.<br><br>See *PeopleSoft CRM: Automation and Configuration Tools*, "My Worklist - Publish as Feed Page". |
| Publish Feed Definition to Sites Page | PTFP_PUB_AS_SITES | Publish an existing feed to other sites.<br><br>See *PeopleSoft CRM: Automation and Configuration Tools*, "My Worklist - Publsih Feed Definition to Sites Page". |
| Define Feed Data Types Page | PTFP_DATATYPE | Define feed data types and publish the list of feeds for that type. |

## Understanding Which PeopleSoft Interaction Hub Items Can Be Published as a Feed

PeopleSoft Interaction Hub provides the capability to publish many types of PeopleSoft Interaction Hub content as feeds. Typically, a feed for one of these items can be published through a Publish as Feed link directly from the administration pages for that item without having to specify any advanced feed options. In PeopleSoft Interaction Hub, you can publish the following types of content as feeds:

- Blogs.

  Advanced feed options do not need to be defined when publishing a blog as a feed.

- Content management folders including managed content folders, categorized content folders, and news publications.

  You can determine which subfolders are to be excluded from the feed through the advanced feed options for the content management folder.

- Discussion forums.

  Advanced feed options do not need to be defined when publishing a discussion forum as a feed.

- Workspaces including action item lists, blogs, calendar events, discussion topics, documents, and wiki content from the workspace.

  You must determine which modules are to be included in the workspace feed through the advanced feed options for the workspace.

  ---

  **Note:** While action items, calendars, and wiki content appear in the list of feed data types delivered with PeopleSoft Interaction Hub, these items can only be published as part of a workspace feed and therefore cannot be published independently from a workspace.

  ---

- Workspace Blogs modules.

  Advanced feed options do not need to be defined when publishing a workspace Blogs module as a feed.

- Workspace Discussions modules.

  Advanced feed options do not need to be defined when publishing a workspace Discussions module as a feed.

- Workspace Documents modules.

  You can determine which subfolders are to be excluded from the feed through the advanced feed options for the Documents module.

In addition, PeopleTools delivers the capability to publish several types of feeds including queries, worklists, Integration Broker messages, and lists of feeds. The PeopleTools PeopleBooks cover publishing and managing PeopleTools feed data types.

See the product documentation for *PeopleTools: Feed Publishing Framework*, “Creating and Using Feeds and Feed Templates.” Publishing Feeds Using the Publish as Feed Pages.

Additional information on specific PeopleSoft Interaction Hub feed types can be found in the PeopleSoft Interaction Hub PeopleBooks.

## Related Links

Publishing a Blog as a Feed

Publishing a Discussion Forum as a Feed

"Top Folder Properties - Advanced Feed Options Page" (PeopleSoft Interaction Hub 9.1: Content Management System)

"Folder Properties Page" (PeopleSoft Interaction Hub 9.1: Content Management System)

"Publications Properties - Advanced Feed Options Page" (PeopleSoft Interaction Hub 9.1: Content Management System)

"Administering Workspace Feeds" (PeopleSoft Interaction Hub 9.1: Collaborative Workspaces)

## Publishing Feed Content

This section provides a high-level overview of the process to publish PeopleSoft Interaction Hub items as feeds.

---

**Note:** In order to have the privileges to publish an item as a feed, you must be an administrator, manager, or owner of that item.

---

To publish an item as a feed:

1. Go to the administration page for that item.

   For example, for a blog, go to the Manage Blog page; for a news publication, go to the Folder Properties page; for a workspace, go to the Administration - Feeds page; and so on.

2. Click the Publish as Feed link.

   Depending on whether feed has already been published for this item, one of the following pages is displayed:

   - The Publish as Feed page is displayed if a feed has already been published for this item. Continue with step 3.
   - The Publish Feed Definition page is displayed if a feed has not been published for this item. Continue with step 4.

3. Determine whether you want to edit one of the current feeds, or create a new feed.

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

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

   See the product documentation for *PeopleTools: Feed Publishing Framework*, "Creating and Using Feeds and Feed Templates," Publishing Feeds Using the Publish as Feed Pages, Defining Feed Properties.

5. If you are required to set advanced options for this feed data type or if you wish to define advanced options for this feed, click the Advanced Options link.

   a. Set the advanced options for the feed.

   b. Click OK on the Advanced Feed Options page.

6. Click the Publish button on the Publish Feed Definition page to save any new or revised feed definitions.

This section also discusses the following topics:

- Publishing feeds to other sites.
- Publishing feed lists.

### Publishing Feeds to Other Sites

PeopleSoft Interaction Hub feeds can also be published to other sites within the system. You use the Publish Feed Definition to Sites page to do this.

See the product documentation for *PeopleTools: Feed Publishing Framework*, "Creating and Using Feeds and Feed Templates," Publishing Feed Definitions to Additional Sites.

### Publishing a List of Feeds

Each of the delivered PeopleSoft Interaction Hub feed data types can also be published as a list of feeds, which provides a list of published feeds of that type.

To publish a list of feeds for a feed data type:

1. Select PeopleTools, Feeds, Define Feed Data Types to access the Define Feed Data Types page for the type of feed you wish to publish as a list.
2. Select the data type for which to produce the list of feeds.

   **Note:** While action items, calendars, and wiki content appear in the list of feed data types delivered with PeopleSoft Interaction Hub, these items can only be published as part of a workspace feed. Therefore, if you publish a list of feeds for one of these types, the feed document will always be empty even though some items have been published as part of a workspace feed.

3. Click the Publish as Feed link.
4. Enter the feed definition information.

   **Note:** To distinguish this as a list of feeds, you can change the feed title to include "List of" — for example, "List of Workspace Feeds."

5. Publish and save the feed definition.

See the product documentation for *PeopleTools: Feed Publishing Framework*, "Creating and Using Feeds and Feed Templates," Publishing a List of Feeds Feed.

# Viewing and Subscribing to Feeds

This topic discusses how to work with My Feeds pagelet and access and view feeds.

## Pages Used to View and Subscribe to Feeds

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| My Feeds Page | PTFP_VIEW | Search and view published feeds to which you have access. |
| Personalize My Feeds Page | EPPFP_MYFEEDS_PREF | Customize the display of the My Feeds pagelet. |

## My Feeds Page

Use the My Feeds page (PTFP_VIEW) to search and view published feeds to which you have access.

**Navigation**

- My Feeds
- Click the View All Feeds link in the My Feeds pagelet.
- Click the search button in the My Feeds pagelet.

Use the My Feeds page to search for and view a list of published feeds to which you have access. For example, you must select the All Sites option on the My Feeds page to view published workspace feeds.

See the product documentation for *PeopleTools: Feed Publishing Framework*, "Creating and Using Feeds and Feed Templates," Accessing Feeds, Using the My Feeds Page.

## Personalize My Feeds Page

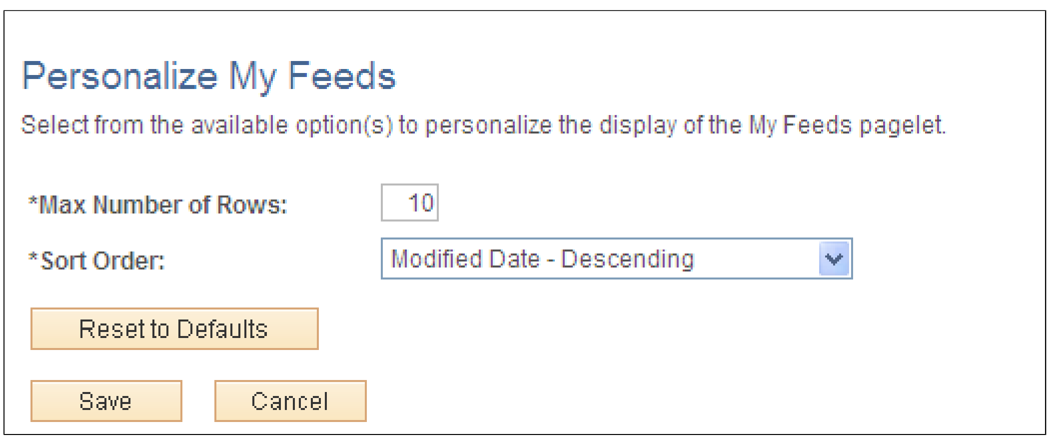
Use the Personalize My Feeds page (EPPFP_MYFEEDS_PREF) to customize the display of the My Feeds pagelet.

**Navigation**

Click the Customize My Feeds button in the My Feeds pagelet.

**Image: Personalizing My Feeds Pagelet**

This example illustrates the fields and controls on the Personalizing My Feeds Pagelet. You can find definitions for the fields and controls later on this page.




Use the Personalize My Feeds page to customize the display of the My Feeds pagelet.

| | |
|---|---|
| **Max Number of Rows** | Enter the maximum number of feeds you want to display in the pagelet. The default value is 10. |
| **Sort Order** | Select one of the following:<br>• *Created Date - Ascending* — Select to sort by feed definition creation date in ascending order—that is, from first to last. |

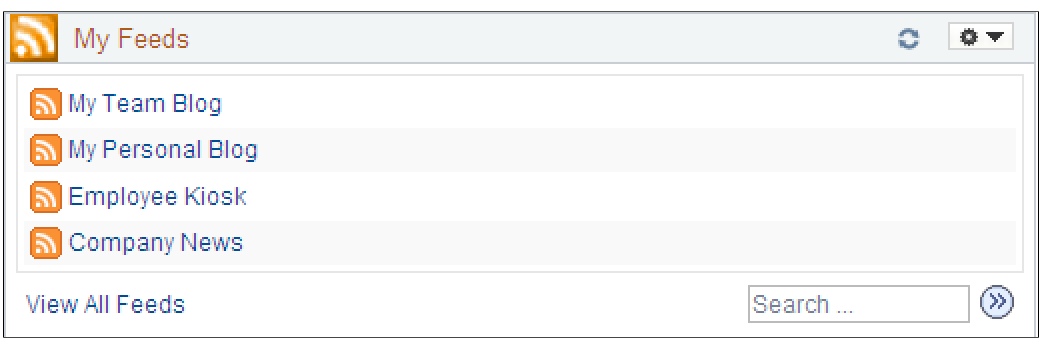
- *Created Date - Descending* — Select to sort by feed definition creation date in descending order—that is, from last to first.
- *Feed Data Type ID* — Select to group feeds by their feed data type.
- *Feed ID* — Select to sort by the feed ID.
- *Feed Title - Ascending* — Select to sort by user-specified feed title in ascending order.
- *Feed Title - Descending* — Select to sort by user-specified feed title in descending order
- *Modified Date - Ascending* — Select to sort by feed definition modification date in ascending order—that is, from first to last.
- *Modified Date - Descending* — Select to sort by feed definition modification date in descending order—that is, from last to first. This is the default sort order.

## My Feeds Pagelet

Access the My Feeds pagelet on the portal homepage as shown below.

**Image: My Feeds pagelet**

This example illustrates the fields and controls on the My Feeds pagelet.




Use the My Feeds pagelet to access and search for the feeds you are authorized to view. The My Feeds pagelet shows feeds from the *current site* only. To access feeds from a different site—for example, from a workspace—use the My Feeds page, or publish the feed definition to the current site using the Publish to Sites page.

See My Feeds Page.

| | |
|---|---|
| **<Feed Title>** | Click a feed title link to open and view the feed document in a separate browser window. |
| **View All Feeds** | Click to access the My Feeds page to search for and view a list of published feeds to which you have access. |

| | |
|---|---|
|  | Click to access the My Feeds page having searched on the text entered in the Search field. |

## Accessing and Viewing Feeds

In PeopleSoft Interaction Hub, feeds can be accessed and viewed in multiple locations including:

- The My Feeds page.

  See the product documentation for *PeopleTools: Feed Publishing Framework*, "Creating and Using Feeds and Feed Templates," Accessing Feeds, Using the My Feeds Page.

- The My Feeds pagelet.
- The Feed Reader pagelet.

  See Feed Reader pagelet on the portal homepage.

- The feeds hover menu on pages and pagelets used with PeopleSoft Interaction Hub features including blogs, content management folders, discussion forums, and workspaces.

  The feeds hover menu displays a list of feeds that is relevant to your current context. For example, if you are currently viewing a specific blog, then the feeds hover menu displays all feeds for that blog. However, if you are viewing the Blogs pagelet, then the feeds hover menu displays all feeds for all blogs that you have access to view.

| | |
|---|---|
|  | Hover over any of these to view the list of feeds published for this context. Click any list item to open that feed document.<br><br>Click the Feed button or Feed link to open the first feed document in the list.<br><br>Click the Open menu button to toggle the list of feeds between frozen open and closed. |

When you click a link to view a feed, the feed document opens in a separate browser window.

See the product documentation for

*PeopleTools: Feed Publishing Framework*

## Subscribing to Feeds

You can subscribe to PeopleSoft Interaction Hub feeds using the Feed Reader pagelet, using your browser, or using a third-party feed aggregator or reader. To subscribe to a feed, obtain the feed URL by:

- Copying the URL from an open feed document.
- Right-clicking on a feed link and selecting to copy the link from the pop-up menu.

### Related Links

Feed Reader pagelet on the portal homepage

# Maintaining Alert Subscriptions

This topic discusses maintaining your alert subscriptions.

## Pages Used to Maintain Alert Subscriptions

| *Page Name* | *Definition Name* | *Usage* |
|---|---|---|
| My Alerts Page | EPPAN_MY_ALERTS | View and maintain all of your alert subscriptions. |
| General Profile Information Page | USER_SELF_SERVICE | Maintain your system profile including the email address used for alert subscriptions. |

## My Alerts Page

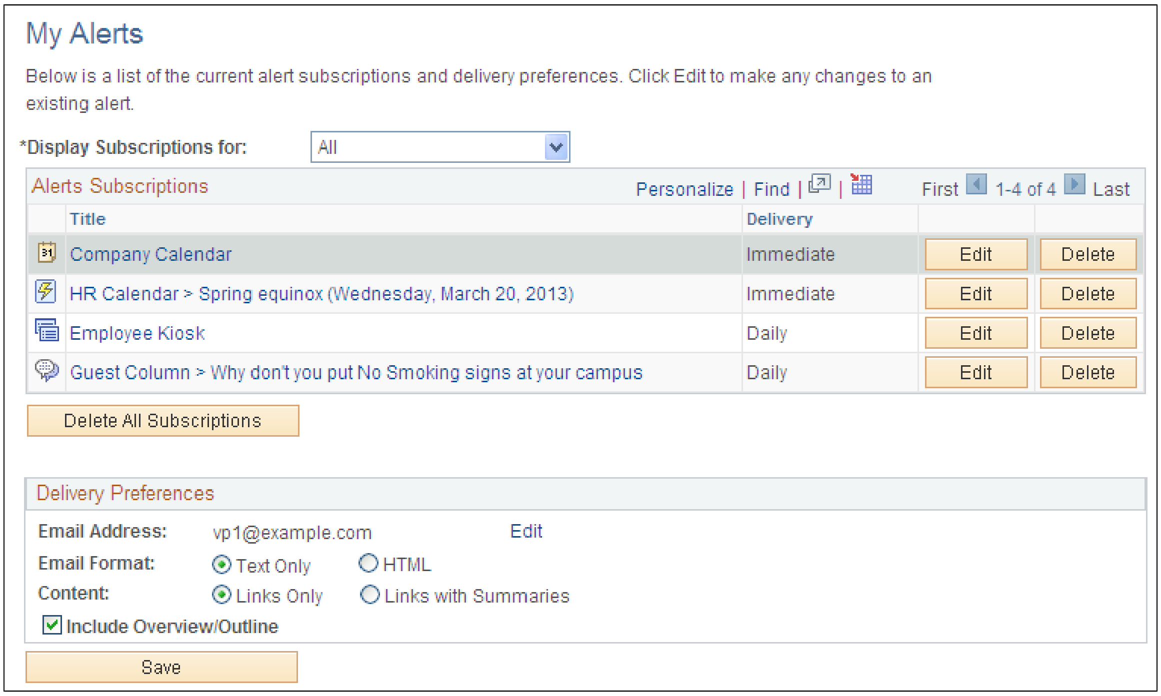
Use the My Alerts page (EPPAN_MY_ALERTS) to view and maintain all of your alert subscriptions.

**Navigation**

- My Content, My Alerts
- Click the View All My Alert Subscriptions on the Update Alerts Subscription page.
- Click the View All My Alert Subscriptions on the Add Alert Subscription page.

**Image: Maintaining Your Alert Subscriptions Page**

This example illustrates the fields and controls on the Maintaining Your Alert Subscriptions Page. You can find definitions for the fields and controls later on this page.




Use the My Alerts page to view and maintain all of your alert subscriptions. You can subscribe to alerts for:

- Discussion forums.
- Discussion forum topics.
- Collaborative workspace discussions.
- Collaborative workspace discussion topics.
- Community calendars.
- Collaborative workspace calendars.

**Display Subscriptions for**

Select a scope:

- *All* — To display all your calendar and discussion forum subscriptions.
- *Community Calendars*— To display all your calendar subscriptions.

| | |
|---|---|
| | • *Discussion Forum*— To display all your discussion forum subscriptions. |
| **Title** | Click a title to open that item in a new window. |
| **Edit** | Click the Edit button to access the Update Alerts Subscription page to edit that alert subscription. |
| **Delete** | Click the Delete button to delete the alert subscription. You are prompted to confirm the deletion. |
| **Delete All Subscriptions** | Click to delete all alert subscriptions. You are prompted to confirm the deletions. |
| **Edit** | Click the Edit link to access the General Profile Information page, on which you can enter the email address at which you want to receive email alerts. |
| **Email Address** | Displays the email address to which the email alerts are being sent. This email address is defined on the General Profile Information page. |
| **Email Format** | Select the format in which email alerts should be sent to you:<br>• *Text Only* — Select for text-based email alerts.<br>**Note:** The contents of the email will use any text header and footer definitions defined by the portal administrator on the Define Alerts Email page.<br>• *HTML* — Select for HTML-based email alerts.<br>**Note:** For this option to be available, the Allow HTML Email option must be selected by the portal administrator on the Define Alerts Email page. The contents of the email will use any HTML header and footer definitions defined by the portal administrator on the Define Alerts Email page. |
| **Content** | Select one of the following:<br>• *Links Only* — Select to indicate that the email should contain only links to the items in the alert.<br>• *Links with Summaries* — Select to indicate that the email should contain links to and summaries about the items in the alert. |
| **Include Overview/Outline** | Select to have email alerts sent with an overview at the beginning of the email. The overview contains an outline of the email contents. |

## Related Links

"Understanding Email Alerts" (PeopleSoft Interaction Hub 9.1: Portal and Site Administration)

"Managing Alert Subscriptions" (PeopleSoft Interaction Hub 9.1: Portal and Site Administration)

## General Profile Information Page

Use the General Profile Information page (USER_SELF_SERVICE) to maintain your system profile including the email address used for alert subscriptions.

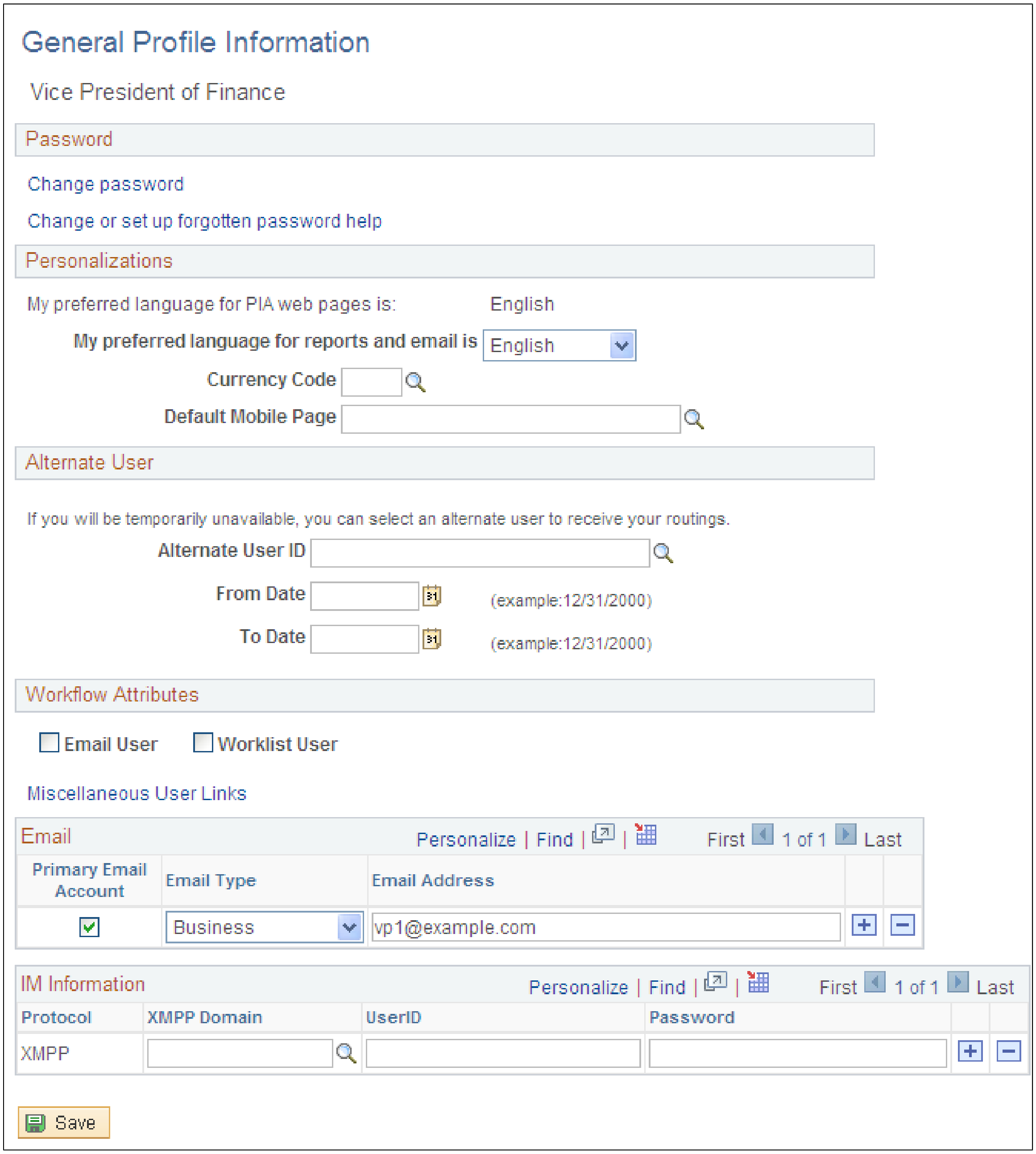
 

**Navigation**

- Click the Edit link on the My Alerts page.
- My System Profile

**Image: General Profile Information page**

This example illustrates the fields and controls on the General Profile Information page. You can find definitions for the fields and controls later on this page.




Use the General Profile Information page to maintain your system profile including the email address used for alert subscriptions.

| | |
|---|---|
| **Primary Email Account** | Select to identify the email account for alert subscriptions. |

| | |
|---|---|
| **Email Type** | Select the type for this email address. |
| **Email Address** | Enter your complete email address. |

The other fields on this page are documented in PeopleTools PeopleBooks.

See the product documentation for *PeopleTools: Applications User's Guide*, “Setting User Preferences,” Setting User Personalizations, Setting Up Your System Profile.

## Chapter 11

# Working With Tags

## Understanding Tagging in PeopleSoft Interaction Hub

Tagging, also known as social bookmarking, provides the means for you to store, organize, search, and manage content bookmarks in PeopleSoft Interaction Hub. Tagging enables both publishers and consumers of content to classify the material in a way that is meaningful. Moreover, tags are shared with other users, thus benefitting the entire user community. This increases the probability of properly characterizing the content and hence its discovery and use. Tags are also a way to measure which particular topics are of relevance to the user community. Tagging provides for discovery of and navigation to other content that is related through the same tags without the need to hard-code those connections. Thus, tagging is both a means of classifying content and a way of creating ad hoc navigation paths among related items.

PeopleSoft Interaction Hub supports three models for tagging content:

- As a feature integrated directly with other PeopleSoft Interaction Hub content types including blogs, collaborative workspaces, content management system items, and discussion forums. Specifically, PeopleSoft Interaction Hub is delivered with the ability for you to tag:

  - Blogs and blog posts.
  - Collaborative workspaces, workspace blogs and blog posts, workspace discussion forums and topics, and workspace content.
  - Content management system items including news articles, managed content, and categorized content.
  - Discussion forums and topics.

  See the remainder of this topic for a discussion of how to use the built-in tagging features of PeopleSoft Interaction Hub.

- As the Related Tags related content service that can be added to transaction pages in other PeopleSoft applications.

  SeeUnderstanding the Related Discussion Service .

- As a web service for consumption by non-PeopleSoft applications.

  See "Enabling Web Services" (PeopleSoft Interaction Hub 9.1: Portal and Site Administration).

For each of these models, the PeopleSoft Interaction Hub database serves as the central tag repository.

In addition, PeopleSoft Interaction Hub provides tag cloud features and a tag browser (search) allowing you to discover content using tags.

# Creating and Managing Tags

This section provides an overview of creating and managing tags and discusses how to:

- Create and update tags.
- Manage tags as a portal administrator.

## Understanding Creating and Managing Tags

In PeopleSoft Interaction Hub, tags can be assigned to the following items:

- Blogs and blog posts.
- Collaborative workspaces, workspace blogs and blog posts, workspace discussion forums and topics, and workspace content.
- Content management system items including news articles, managed content, and categorized content.
- Discussion forums and topics.

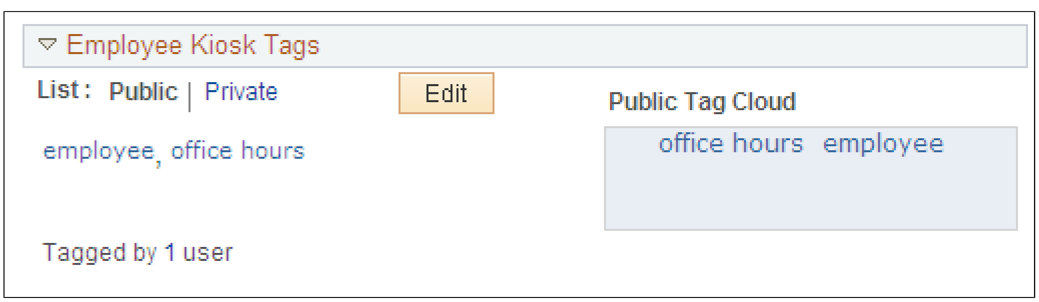
The tools to create and manage tags are integrated directly into the pages where those content items are displayed. These tagging tools are located in an expandable Tags section that includes:

- Tag list — The tag list provides the ability to view, create, and update your public and private tags for the current item.
- Tag cloud — The tag cloud displays all of the public tags for the current scope.

**Image: Expandable tags section (from a discussion forum)**

The following example shows the expandable Tags section from a discussion forum. At this level, the Tags section includes the tag list and the tag cloud:

The following example illustrates the Expandable tags section (from a discussion forum).




This section also discusses the following topics:

- Scope of the tag cloud.
- Public tags vs. private tags.
- Special characters and tag searches.
- Tags in a multi-language environment.

## Scope of the Tag Cloud

In PeopleSoft Interaction Hub, there are three different types of tag clouds:

- Feature-specific tag clouds.

  This section provides additional information on feature-specific tag clouds.

- Tag Cloud homepage pagelet.

  See Working With the Tag Cloud Pagelet.

- Search page tag cloud.

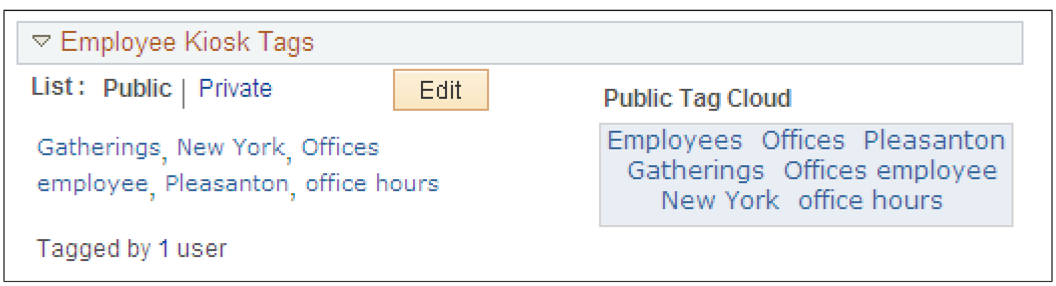
  See Search Tags Page.

A feature-specific tag cloud displays all of the public tags for the current scope. Tag clouds are provided for high-level features (blogs, collaborative workspaces, discussion forums, workspace blogs, and workspace discussions) and not for individual content items in that feature (for example, blog posts, discussion topics, news articles, items of managed content, and so on). The scope of the tag cloud spans tags for that item as well as all the content within that item. For example, the scope of the tag cloud for a blog includes tags on the blog itself plus the tags for all of the posts in that blog. The scope of the tag cloud for a workspace includes tags on the workspace itself plus all tags for all features within the workspace including the workspace blog, documents, and discussions.

The following example shows the expandable Tags section from a discussion forum. In this Tags section, the tag list shows tags at the discussion forum level, while the tag cloud shows public tags for the forum itself plus all public tags for all topics within this forum:

**Image: Scope of a feature-specific tag cloud**

The following example illustrates the Scope of a feature-specific tag cloud.




In this example, *employees* and *offices* are tags at the forum level. Furthermore, you can deduce that *gatherings, Pleasanton,* and *New York* are tags at the topic level only because they do not appear in the tag list for the forum itself. Because of its larger font size, you can deduce that *offices* must also be a tag at the topic level as well as a tag at the forum level.

The default sort order in the tag cloud is from the most recently created tag to the oldest tag. The sort order in feature-specific tag clouds is not user configurable.

## Public Tags vs. Private Tags

Public tags are shared with everyone who has access to a feature. Public tags are the essence of social bookmarking. In addition, PeopleSoft Interaction Hub provides the ability for you to create private tags. These tags are visible to and searchable by you only and provide a mechanism for you to create your own private bookmarks. Private tags can be deleted only by the user who created the private tag.

## Special Characters and Tag Searches

Special characters—such as, +, -, #, $, *, and so on—can be used as part of a tag. However, because these characters are filtered out of a search when you click on a tag, your search results do not display the tag or the tagged content. You must manually re-enter the search term and click the Search button to retrieve the correct results.

For example, if *C++* is the tag that you created, then clicking the C++ tag searches on the term *C,* and not *C++.* You must manually re-enter *C++* on the Search Tags page and click the Search button to retrieve the correct results.

Therefore, we recommend you avoid using the following special characters in tags:

```
,  !  @  #  $  %  ^  &  (  )  *  +  =  {
}  [  ]  :  ;  "  `  <  >  ?  /  .  |  \
```

**Note:** A comma (,) is always interpreted as the tag separator.

## Tags in a Multi-Language Environment

In a multi-language environment, when there are tags available for an item in the base language but not in the session language, then you are presented with an option to view the base language tags. This is because there can be only one base language per database and this base language is typically a common language. However, tags are not displayed for other non-base languages that are different from the session language.

PeopleSoft Interaction Hub displays session language tags and base language tags as follows:

- If the session language is the base language and there are no base language tags, no tags are displayed even if there are tags in a non-base language.
- If the session language is not the base language and there are session language tags, the session language tags are displayed. You are also given the option to view base language tags if there are base language tags present.
- If the session language is not the base language and there are no session language tags, you are given the option to view base language tags if there are base language tags present.
- If the session language is not the base language and there are no session language tags and no base language, no tags are displayed even if there are tags in another non-base language.

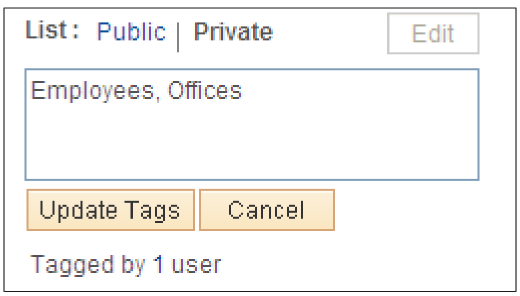
## Tags List Page

**Image: Tag list (view mode)**

The following example illustrates the Tag list (view mode). In the expandable Tags section, use the tag list to create and update tags.


**Image: Tag list (update mode)**

The following example illustrates the Tag list (update mode). Use the tag list to view and create tags for the current item. In view mode, the Edit button is active. In update mode, the Update Tags and Cancel buttons are active.




| | |
|---|---|
|  | Click the Expand section button to reveal the content in the Tags section; click the Collapse section button to hide the content in the Tags section. |
| **Public** | Click this link to view or edit your public tags for the current item. |
| **Private** | Click this link to view or edit your private tags for the current item. |
| **Edit** | Click this button to create tags or update tags for the current item. |
| **<edit box>** | In view mode, click a tag link to open the Search Tags page searching on this tag and using a scope that is appropriate for the current feature (that is, if the tag clicked is in a blog post, then the search scope on the Search Tags page is set to all blogs).<br><br>In update mode, enter tags here separated by commas.<br><br>**Important!** We recommend that you avoid special characters in tags. |

| | |
|---|---|
| | See Special Characters and Tag Searches. |
| **Update Tags** | Click to save any changes and return to view mode. |
| **Cancel** | Click to cancel any changes and return to view mode |
| **Tagged by # users** | Mouse over the number link to view which users have tagged this item. |

## Managing Tags as an Administrator

As an administrator for a particular item, you have the ability to manage not only your own tags, but all public tags created for that feature. This tag administration capability applies to blog moderators, content management folder administrators, discussion forum moderators, workspace administrators, and workspace contributors, as well as portal administrators. As an administrator, when you click the Edit button for public tags, you are able to edit and update any of the public tags. However, when you click the Private link you are able to see your private tags only. Similarly, when you click the Edit button for private tags, you are able to edit and update your private tags only.

**Note:** However, the news publication details (EPPCM_NWDSPSEC) pages accessible from news publication homepage pagelets do not allow an administrator to manage public tags for other users. When the same news article is accessed through the content management system, the administrator can manage all public tags.

# Working With the Tag Cloud Pagelet

This topic discusses how to personalize and use the Tag Cloud pagelet.

## Page Used to Personalize the Tag Cloud Pagelet

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| Personalize Tag Cloud Page | EPPTG_CLOUD_PREF | Customize the display of tags in the Tag Cloud pagelet. |

## Personalize Tag Cloud Page

Use the Personalize Tag Cloud page (EPPTG_CLOUD_PREF) to customize the display of tags in the Tag Cloud pagelet.

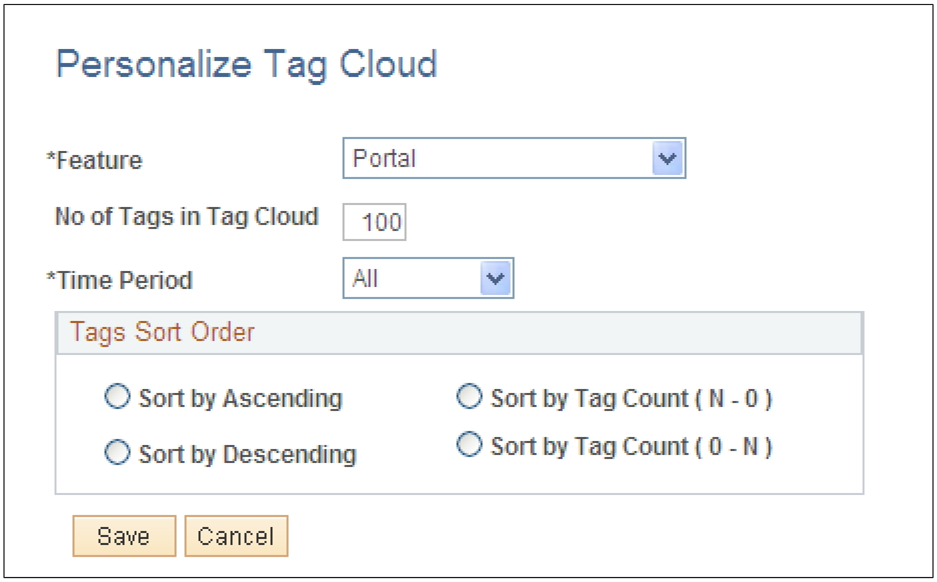
 

**Navigation**

Click the Customize Tag Cloud button on the Tag Cloud pagelet.

**Image: Personalizing the Tag Cloud Pagelet**

This example illustrates the fields and controls on the Personalizing the Tag Cloud Pagelet. You can find definitions for the fields and controls later on this page.




Use the Personalize Tag Cloud page to customize the display of tags in the Tag Cloud pagelet.

**Feature**

Select the scope for the tags displayed in the pagelet:

- *All My Tags* — Displays all of your public and private tags.
- *All Tags* — Displays all public tags across all systems including tags added through the Related Tags related content service.
- *Blogs* — Displays all public tags for blog content.
- *Content* — Displays all public tags for content in the content management system.
- *Discussions* — Displays all public tags for discussion forum content.
- *Portal* — Displays all public tags across all content types within the portal.
- *Workspaces* — Displays all public tags for collaborative workspaces and content residing in workspaces.

**No of Tags in Tag Cloud**

Specify the maximum number of tags to display in the pagelet.

**Note:** Setting this to 0 or no value results in the maximum number being reset to the default of 100.

| | |
|---|---|
| **Time Period** | Select the time period for the tags displayed in the pagelet:<br>• *1 Day* — Display tags created within the last 24 hours.<br>• *1 Week* — Display tags created within the last 7 days.<br>• *1 Month* — Display tags created within the last 30 days.<br>• *1 Quarter* — Display tags created within the last 90 days.<br>• *1 Year* — Display tags created within the last 365 days.<br>• *All* — Display all tags. |
| **Tag Sort Order** | Select the sort order for the tags displayed in the pagelet:<br>• *Sort by Ascending* — Sort alphabetically in ascending order (A-Z).<br>• *Sort by Descending* — Sort alphabetically in descending order (Z-A).<br>• *Sort by Tag Count ( N - 0 )* — Sort by tag usage from most used to least used.<br>• *Sort by Tag Count ( 0 - N )* — Sort by tag usage from least used to most used. |

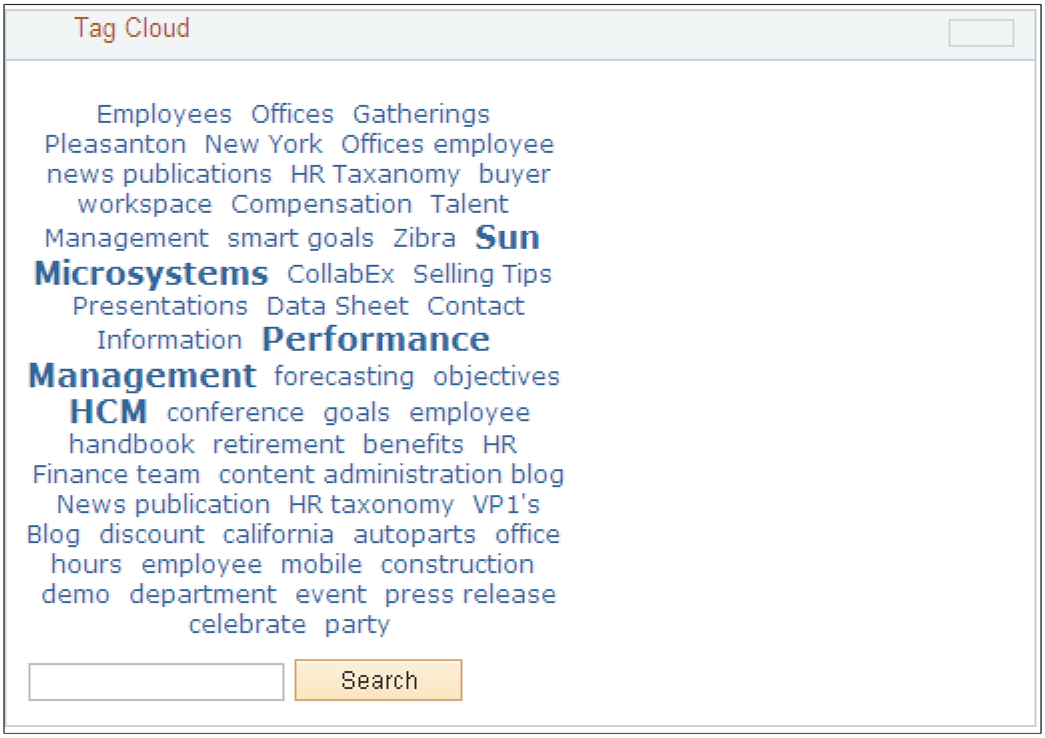
 

## Tag Cloud Pagelet

Access the Tag Cloud Pagelet on the portal homepage.

**Image: Tag Cloud pagelet**

The following example illustrates the Tag Cloud Pagelet on the portal homepage.




Use the Tag Cloud pagelet to view tags in use in the system. The information displayed in the pagelet depends on the personalizations you set on the Personalize Tag Cloud page. You can personalize the information displayed in the cloud by:

- Scope — Select the feature for which tags are displayed.
- Sort order — Alphabetic or by count.
- Time period — The period in which tags were created.

You can use the Tag Cloud pagelet to:

- Visually review the tags in use in the system and the relative frequency of their use. (*Use* refers to the number of times a tag has been assigned to an item, and not the number of times a tag has been clicked, accessed, or searched.)

  Tags appearing in the largest font have been assigned to items more frequently than other tags have. In the preceding example, *employees, offices,* and *Portal Solutions* have been used the most frequently.

- Click on a specific tag to access the Search Tags page with a search on where that tag has been used using the scope specified for the Tag Cloud pagelet.
- Enter your own search term to access the Search Tags page with a search to determine if that tag has been used anywhere within the portal scope.

### Related Links

[Personalize Tag Cloud Page]

[Performing Searches for Tags]

# Performing Searches for Tags

This topic describes how to search for tags.

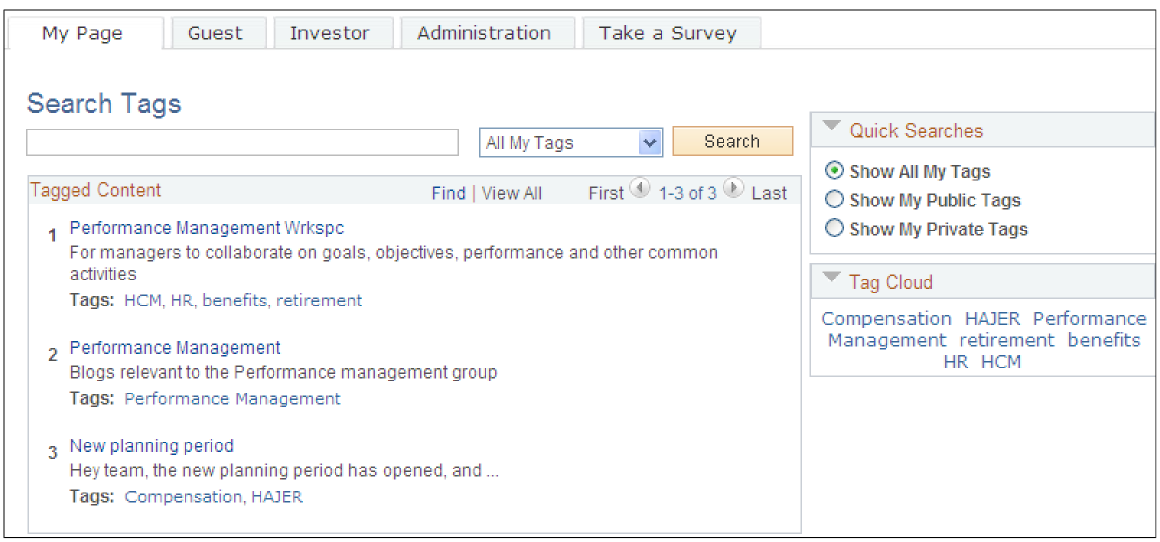
## Page Used to Perform Searches for Tags

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| Search Tags Page | EPPTG_TAG_BROWSE | Search for tags. |

## Search Tags Page

**Image: Searching for Tags Page**

The following example illustrates the Search Tags page. Access the Search Tags page (click a tag anywhere in the portal; or My Content, Search Tags) as shown below.




Use the Search Tags page (EPPTG_TAG_BROWSE) to search for tags.

**Navigation**

- Click a tag anywhere in the portal.
- My Content, Search Tags
- Enter the search text and click the Search button in the Tag Cloud pagelet.

  The tag browser opens on a modal window.

**Important!** Special characters in tags do not give the expected search results.

See Creating and Managing Tags.

**search text**

Enter the tag to search for.

**scope**

Select the scope for the search:

- *All My Tags* — Searches in all of your public and private tags.
- *All Tags* — Displays all public tags across all systems including tags added through the Related Tags related content service.
- *Blogs* — Searches in all public tags for blog content.
- *Content* — Searches in all public tags for content in the content management system.
- *Current Workspace* — Searches in all public tags for the current workspace and content residing in the workspace.

  **Note:** *Current Workspace* is available only while you are in a workspace; this is the default scope when searching tags while in a workspace.

- *Discussions* — Searches in all public tags for discussion forum content.
- *<Node> Domain* — Searches in all public tags within the remote node.

  **Note:** If the Related Tags service is configured for use with one or more PeopleSoft applications, then a separate scope exists for each remote node on which the service is in use.

- *Portal* — Searches in all public tags across all content types within the portal.
- *Workspaces* — Searches in all public tags for collaborative workspaces and content residing in workspaces.

**Note:** A search is executed when the scope is selected. The Tag Cloud section is updated with all public tags for the selected scope.

**Search**

Click to execute a search with the given search text and scope.

Click the arrow to the left of Quick Searches to collapse or expand this section.

**Quick Searches**

Select an option in the Quick Searches group box to perform a search:

**Note:** When selecting one of these options, the search scope is automatically set to All My Tags and the search is executed.

- *Show All My Tags* — Shows all of your public and private tags.
- *Show My Public Tags* — Shows all of your public tags only.

  **Note:** If you have tagged an item with both public and private tags, then the private tags are also displayed in this search.

- *Show My Private Tags* — Shows all of your private tags only.

  **Note:** If you have tagged an item with both public and private tags, then the public tags are also displayed in this search.

**Tagged Content**

Review the list of results and:

- Click the link for an item to open that content in the current browser window.

  **Note:** Content residing in a collaborative workspace or another site is opened in a separate browser window.

- Click a tag to perform a new search on that tag using the current search scope.

Click the arrow to the left of Tag Cloud to collapse or expand this section.

**Tag Cloud**

The Tag Cloud section displays all the public tags for the currently selected search scope or the tags that reflect the selected quick search option.

Click a tag in the tag cloud to perform a new search on that tag using the current search scope.

The default sort order in the tag cloud is from the most recently created tag to the oldest tag. The sort order in the tag cloud on the Search Tags page is not user configurable.

Chapter 12

# Managing Polls

## Understanding Polls

Polls are a simple way for you to gather opinions and comments from your portal users using a pagelet that is displayed on the homepage or in a workspace. Use Poll pagelets to show a single question or poll in a pagelet and enable users to add comments and see other responses to the poll. Until the user has answered the poll, only the poll question appears in the pagelet. After the user has responded to the poll, the current poll results appear in the pagelet.

Poll pagelets are not created using Pagelet Wizard, but are created from within the Poll component for sites. Workspace polls are created at the time the workspace is created and can display only one poll.

**Image: Unanswered Poll pagelet**

The following example illustrates the Unanswered Poll pagelet.

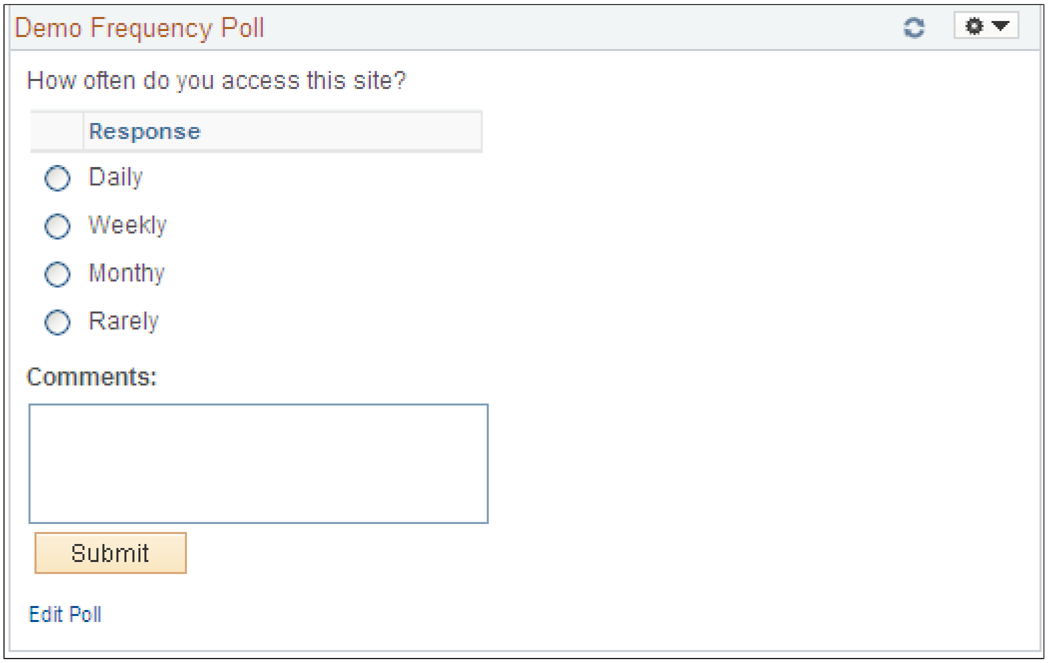
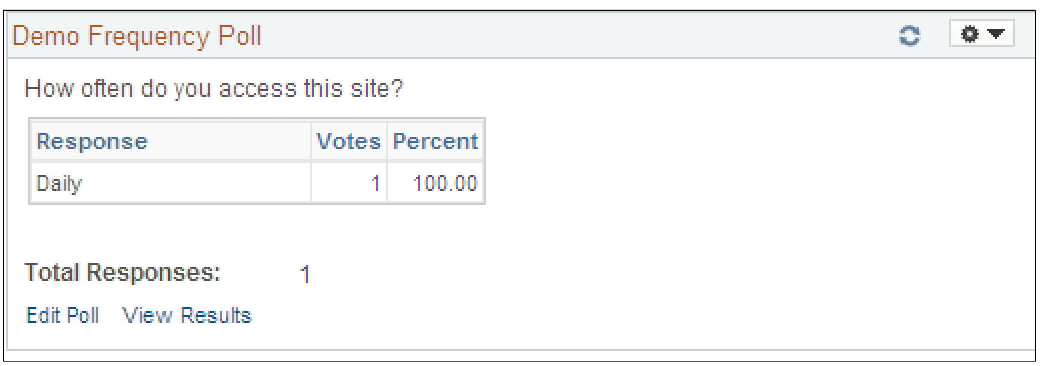



**Image: Poll pagelet with responses**

The following example illustrates the Poll pagelet with response.




The poll administrator can manage the display and content of the poll by clicking the Edit Poll link to access the Maintain Polls component.

Although only one question is displayed in the pagelet at a time, you can create multiple questions and have them appear based on different publishing dates. For example, you can create the Poll pagelet and have a different question appear each month by assigning effective-dated publishing dates to the future questions.

---

**Note:** To ask a single question using a template pagelet, use the Content Ratings feature. To ask users a series of questions, use the Surveys feature.

---

See Managing Content Ratings

See Completing Surveys

## Understanding Polls in Workspaces

# Defining Polls

This topic discusses accessing, defining, maintaining and configuring polls.

## Pages Used to Define Polls

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| My Polls Page | EPPSP_LST_POLL | View all existing polls that you have access to. |
| Add Poll Page | EPPSP_ADD_POLL | Add a poll to a site. |
| Maintain Polls Page | EPPSP_CFG_POLL | Define high-level information, such as the poll ID and description. Add, edit, and delete poll questions. |
| Question Details Page | EPPSP_CFG_QUEST | Enter a poll question and possible responses. |
| Publish Poll as Pagelet Page | EPPSP_CFG_PUB | Set the values to create or update the pagelet for the poll definition. |
| Members Page | EPPSP_CFG_MBR | Create and edit lists of members and their associated access privilege sets to the poll. Access to the poll definition is limited to the listed members. |
| Respondents Page | EPPSP_CFG_VWR | Set the security for the published Poll pagelet enabling users with the specified security access to respond to poll questions. |

## My Polls Page

Use the My Polls page (EPPSP_LST_POLL) to view all existing polls that you have access to.

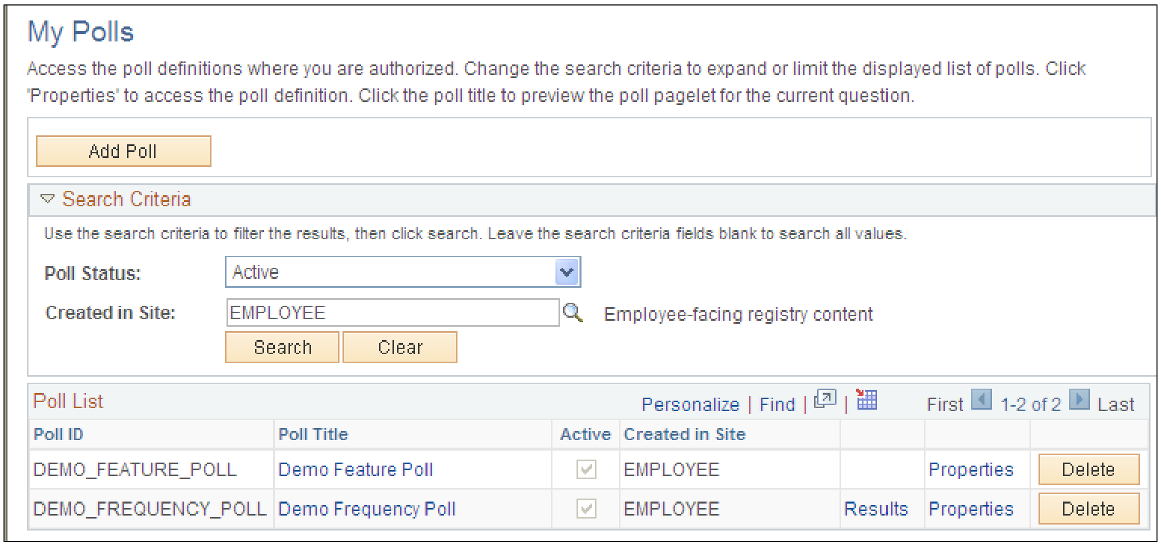
 

**Navigation**

My Content, My Polls

**Image: Accessing Polls Page**

The following example illustrates the My Polls page. Access the My Polls page (My Content, My Polls).




## Search Criteria

**Poll Status**

Select the status of the poll to define your search. Valid values are *Inactive* or *Active.*

**Created in Site**

Displays the list of poll definitions that you can view.

## Poll List

The Poll List grid displays basic poll definition information and enables you to preview the poll as well as access the pages to edit and manage existing polls.

**Poll ID**

Displays the identifier for the poll.

**Poll Title**

Displays the title of the poll. Click this link to view a preview of the current question displayed in the poll pagelet.

**Active**

If the poll question is active, the checkbox appears as selected.

**Created In**

Displays where the poll was initially created.

**Properties**

Click to access the Maintain Polls component where you can manage those poll properties you have privileges for.

**Delete**

Click to delete the poll definition along with the associated questions, results, comments, and content references for the poll. You will be prompted to confirm your deletion.

## Add Poll Page

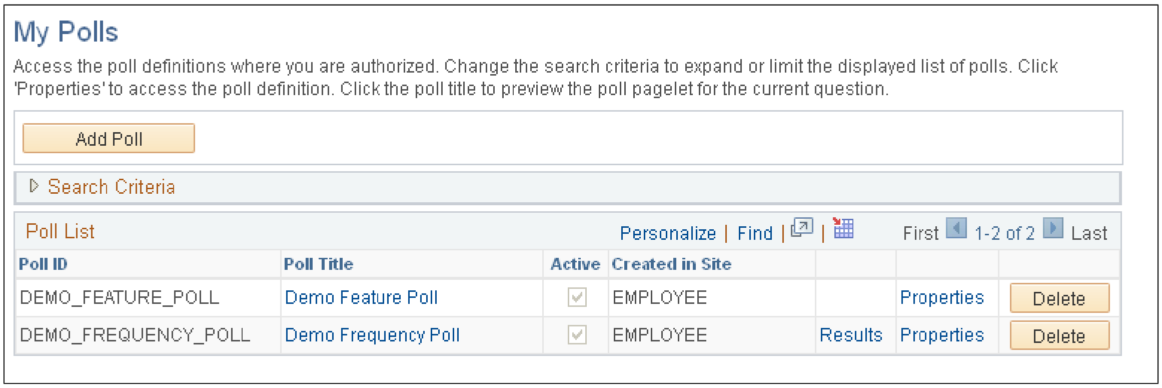
Use the Add Poll page (EPPSP_ADD_POLL) to add a poll to a site.

**Navigation**

Click the Add Poll  button on the My Polls page.

**Image: My Polls page**

The following example illustrates the Add Poll page.




**Poll Title**

Enter the text that will appear as the title of the pagelet.

**Active**

Select the checkbox to make the Poll pagelet active on the site homepage. Although the pagelet will still appear on the homepage, the poll question will not be available to view or answer unless this box is selected.

**Show Results to Respondents**

Select to enable respondents to view the poll results when they have completed the poll question. .

**Separate Results by Site**

Select to sort poll results by site. For example, you can have the same poll available on multiple sites. If a user answers the same poll on different sites, it will count those results separately for each site. This also enables the user to answer the poll differently on each site, if appropriate. Once a user submits a response to any question associated with this poll, this checkbox becomes unavailable.

---

**Note:** This option is not available for polls created for workspaces.

---

Once you save the Add Polls page, the system displays the poll information in the Maintain Polls page.

## Maintain Polls Page

Use the Maintain Polls page (EPPSP_CFG_POLL) to define high-level information, such as the poll ID and description.

Add, edit, and delete poll questions.

**Navigation**

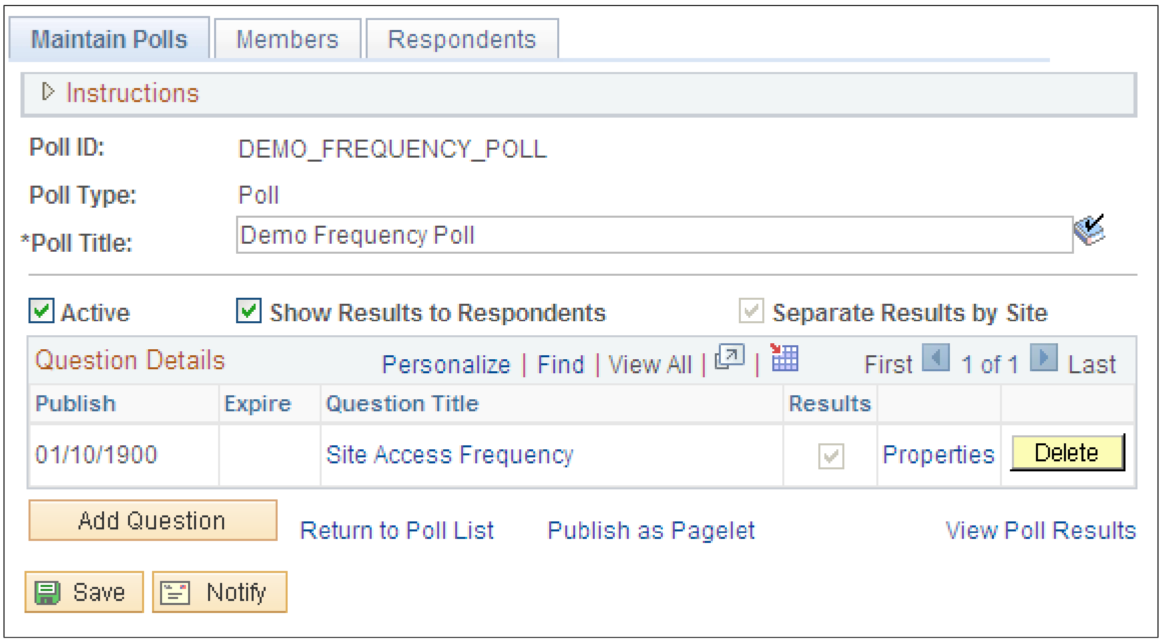
Click the Properties link for a poll on the My Polls page.

Click Edit Poll in the pagelet, if you have the appropriate privileges.

In Workspaces, select Polls in the menu navigation.

**Image: Maintain Polls page**

The following example illustrates the Maintain Polls page.




The poll definition information from the Add Poll page appears on the page for you to edit, if appropriate and if you have privileges.

## Question Details

**Publish** Displays the publish date entered on the Question Details page.

**Expire** The value that appears is based on the publication date of subsequent questions. The current question is retired when the next question is published.

**Question Title** Displays the contents of the Question Title field entered on the Question Details page. Click the text of the question to display the Preview Poll Pagelet page.

**Results** Select to enable specified users to view the results after completing the poll question.

**Properties** Click to access the Question Details page, where you can edit the associated question.

You can only edit the question until the first user responds to the question. At that time, it becomes ready-only.

| | |
|---|---|
| | **Note:** Once a user has responded to the poll question, it is no longer available for editing. |
| **Delete** | Click to delete the associated question, results, and comments. You will be prompted to confirm your deletion. |
| **Add a Question** | Click to access the Question Details page, where you can enter a poll question. |
| **Return to Poll List** | Click the link to access the My Polls page where the polls you have access to are listed.<br>**Note:** This option is not available for polls created for Workspaces. |
| **Publish as Pagelet** | Click to access the Publish Poll as Pagelet page.<br>See Publish Poll as Pagelet Page.<br>**Note:** This option is not available for polls created for Workspaces. Workspace polls are predefined as part of the workspace template. |
| **View Poll Results** | Click to access the Poll Results page where you can view the results of the poll if you have the privileges to view results.<br>See Managing Poll Results. |

### Previewing the Poll Pagelet

Click the text of the Question Title field to access the Preview Poll Pagelet page. The question and its answers appear in the pagelet, enabling you to view the pagelet before you publish it.

## Question Details Page

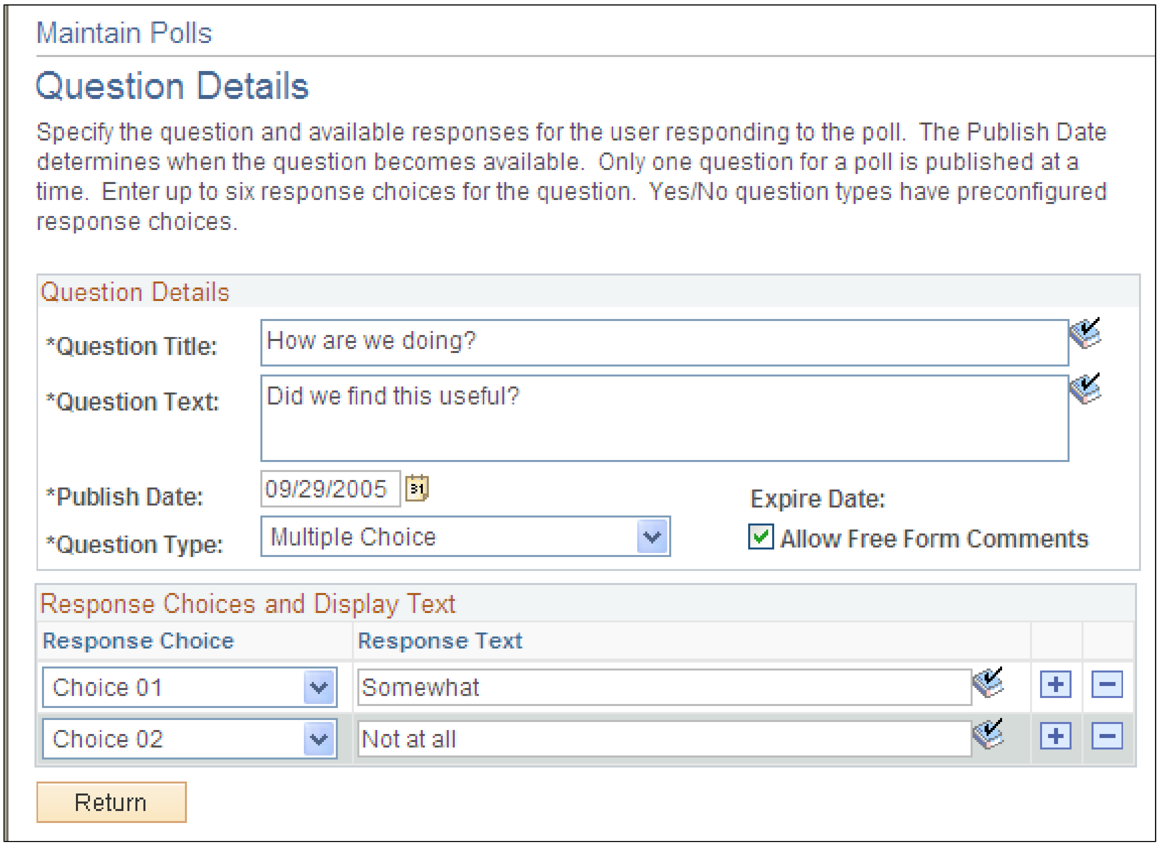
Use the Question Details page to enter details for a question.

**Navigation**

Click the Add Question button on the Maintain Polls page.

**Image: Question Details page**

The following example illustrates the Question Details page.




**Question Title**

Enter a title for the question. The text is used as an identifier for the question.

---

**Note:** The published pagelet title is taken from the poll title rather than the question title.

---

**Question Text**

Enter the poll question.

**Publish Date**

Select the question publication date. This value defaults to the current date.

When this question is published, any currently running question will expire. Only one question can be published for a single poll ID.

**Expire Date**

Displays a date based on the publication date of subsequent polls. The question is retired (expires) when the next poll question is published. If there is only one question for the poll, this field is not populated.

| | |
|---|---|
| **Question Type** | Select the type of question you want to present in the poll. Available values are:<br><br>*Multiple Choice.* Select to present a multiple choice question. When this value is selected, the Answers and Descriptions group box displays.<br><br>*Ranking List.* Select to present a ranking system with which the user can rank the associated content. When this value is selected, the Answers and Descriptions group box displays.<br><br>*Yes/No.* Select to present yes and no answer options to the question. When this value is selected, the Yes/No Response Options group box displays.<br><br>See Completing Surveys. |
| **Allow Free Form Comments** | Select to have a Comments field appear along with the poll question in which users can enter free-form text comments. |

### Response Choices and Display Text

Select Response Choice field values to set the order in which the responses you provide in the Response Text field are present in the poll.

## Publish Poll as Pagelet Page

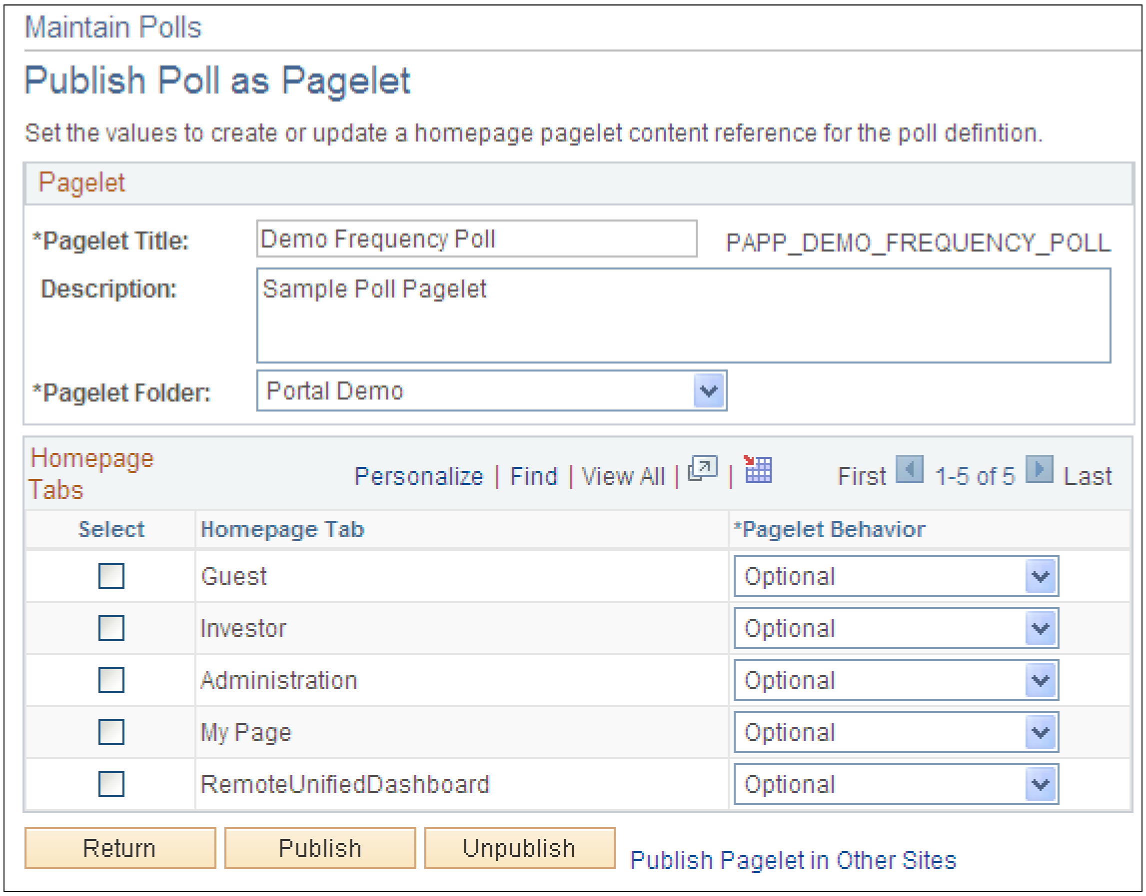
Use the Publish Poll as Pagelet page (EPPSP_CFG_PUB) to set the values to create or update the pagelet for the poll definition.

**Navigation**

Click the Publish as Pagelet link on the Maintain Poll page.

**Image: Publish Poll as Pagelet page**

The following example illustrates the Publish Poll as Pagelet page.




Poll pagelets are created using the My Polls component rather than Pagelet Wizard.

**Pagelet Title**

Enter a title for the pagelet that is used to populate the title/label field. This text becomes the title displayed on the pagelet title bar. The system uses a unique content reference object name that it generates based on the Poll ID. This ID includes the Registry Object Prefix set up under the Portal system options.

**Description**

Enter a description of the pagelet.

**Pagelet Folder**

Select the pagelet folder in which you want to register the pagelet.

## Homepage Tabs

Use this group box to define the homepage tab labels and behavior for the Poll pagelet.

**Portal Label**

Select the tabs that will display the pagelet.

**Pagelet Behavior**

Select the behavior options for the pagelet.

*Optional*. The pagelet will not automatically appear on the homepage. However, it is available for selection when users personalize their homepages. This setting should not be used for guest homepage pagelets because guest users do not have personalization privileges.

*Optional-Default* (optional-default). The pagelet will appear on all user homepages if they have access to the pagelet. The pagelet can be removed when users personalize their homepage. This setting should not be used for guest homepage pagelets because guest users do not have personalization privileges.

*Required-Fixed* (required-fixed). The pagelet will appear on all user homepages if they have access to the pagelet. The placement of the pagelet cannot be changed and the pagelet cannot be removed from the homepage.

*Required*. The pagelet will appear on all user homepages if they have access to the pagelet. The placement of the pagelet can be changed, but it cannot be removed from the homepage.

**Go to Layout**

Click this link to display the Tab Layout page where you can define the pagelet layout properties. This link only appears if the pagelet has been published and you are the site administrator.

### Publishing the Pagelet

**Publish**

Click the button to create or update the pagelet content reference on the current site.

The system displays a confirmation message when the content has been created or updated successfully.

**Unpublish**

Click the button to delete the pagelet content reference and remove it from any homepages.

**Publish Pagelets in Other Sites**

Click to display the Publish to Multiple Portals page where you can publish the poll to multiple sites.

See the product documentation for *PeopleTools: Portal Technology*, “Working With Navigation Pages,” Publishing Pagelets, Publishing a Pagelet to Multiple Portals .

## Members Page

Use the Members page (EPPSP_CFG_MBR) to create and edit lists of members and their associated access privilege sets to the poll.

### Navigation

On the My Polls page, click theProperties link and select the Members tab.

### Image: Maintain Polls page– Members tab

The following example illustrates the Maintain Polls page– Members tab. Access the Members tab.


Use this page to define privilege sets for different groups of users.

**Member Type**

Select the type of participant you want to add to the Poll. Available values include:

*Role.* Select to be able to select a role in the Member Name field. Available group names are derived from PeopleSoft roles defined in the Roles component.

See the product documentation for *PeopleTools: Security Administration*, "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 in the User Profiles component.

See the product documentation for *PeopleTools: Security Administration*, " Administering User Profiles."

**Member Name**

The name of the member as defined in the Roles component or the list of users from the User Profiles component.

---

**Note:** If the pagelet is created in a site, the prompt for members is limited to only members of that site.

---

**Privilege Set ID** — Select a privilege level you want to assign to the member. Available values are:

*Administrator*

*Author*

*Moderator*

*Publisher*

*Viewer*

 — Click to view additional information about the actions that the privilege set enables the member to use.

---

***Warning!*** Use care when changing roles and privilege sets to ensure that you do not inadvertently remove yourself as administrator or you will lose access to the administrative features of the component.

---

## Respondents Page

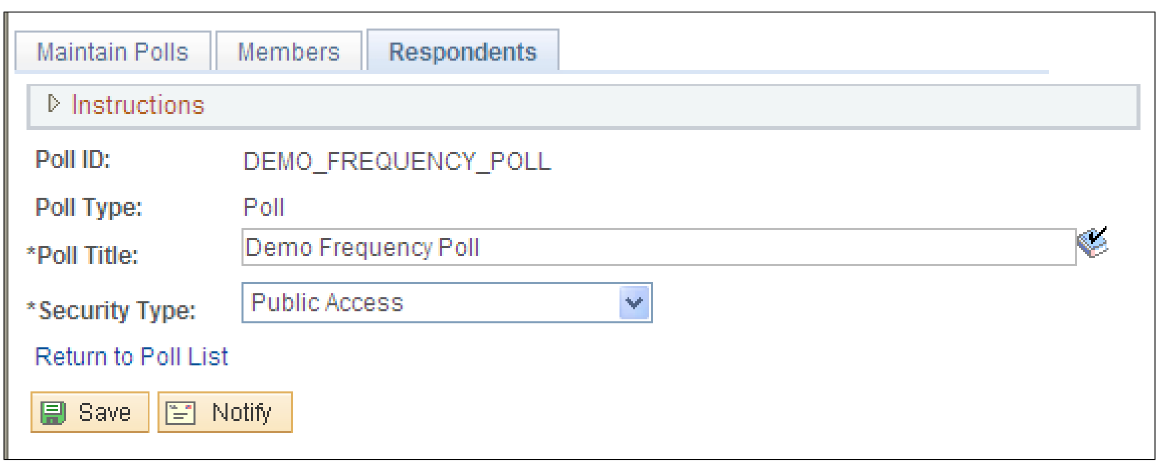
Use the Respondents page (EPPSP_CFG_VWR) to set the security for the published Poll pagelet enabling users with the specified security access to respond to poll questions.

**Navigation**

On the My Polls page, click theProperties link and select the Respondents tab.

**Image: Maintain Polls– Respondents tab**

The following example illustrates the Maintain Polls– Respondents tab. Access the Respondents tab.




**Security Type** — Select the security level for viewing how other users respond to the poll. Available values are:

*Public Access.* This value enables all users to respond to the question.

*Security Role.* This value enables only users with one of more of the listed security roles to respond to the question.

### Respondents

Select a Role Name to enable the users in the role to respond to the poll question.

***Warning!*** Ensure that you include your role in the list of respondents or you will be unable to edit or update the pagelet definition after publication.

# Managing Poll Results

This topic discusses viewing poll results, poll response results and respondent comments.

Use the Preview Poll Pagelet page (EPPSP_INQ_PGLT_SEC) to preview the Poll pagelet.

**Navigation**

Click the name of the question in the Question Title field.

## Pages Used to Manage Poll Results

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| Poll Results Page | EPPSP_INQ_RSLT | View detailed results of active poll pagelets. |
| Response Results Page | EPPSP_INQ_RESP_SEC | View the results and number of respondents for each question. |
| Respondent Comments Page | EPPSP_INQ_CMT_SEC | View comments that respondents have submitted. |

## Poll Results Page

Use the Poll Results page (EPPSP_INQ_RSLT) to view detailed results of active poll pagelets.

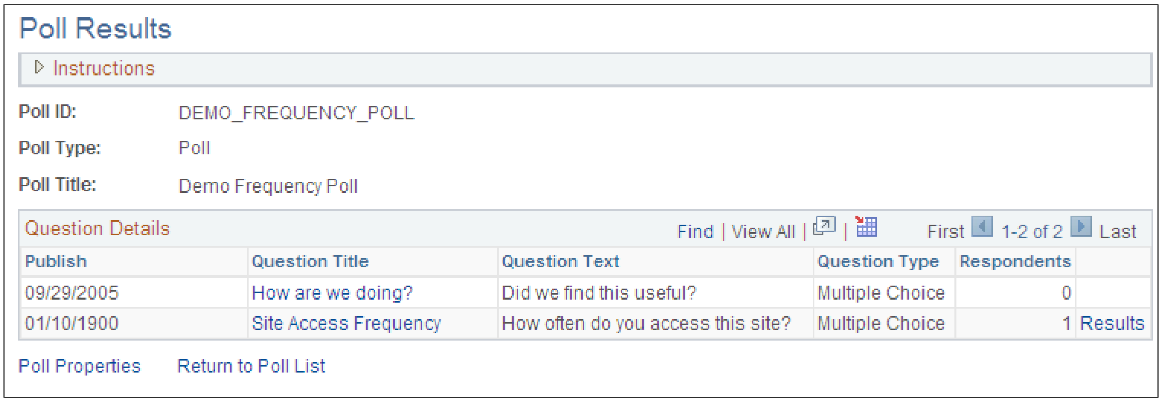
**Navigation**

Click View Results link on the pagelet for the poll.

Click the Results link on the My Polls page.

**Image: Poll Results page**

The following example illustrates the Poll Results page.




The View Results link is only visible to users who have privileges to access to view results.

| | |
|---|---|
| **Publish** | Displays the publish date entered on the Question Details page. |
| **Question Title** | Displays the contents of the Question Title field entered on the Question Details page. Click the text of the question to display the Preview Poll Pagelet page |
| **Question Text** | Displays the contents of the question. |
| **Question Type** | Displays the type of question presented in the poll. Available values are:<br>*Multiple Choice.*<br>*Ranking List.*<br>*Yes/No.* |
| **Respondents** | Displays the number of user who have responded to the poll. |
| **Results** | Click the Results link to view the Results page. |
| **Comments** | Click the Comments link to view the comments that users enter in response to the poll on the Respondent Comments page. |

## Response Results Page

Use the Response Results page (EPPSP_INQ_RESP_SEC) to view the results and number of respondents for each question.

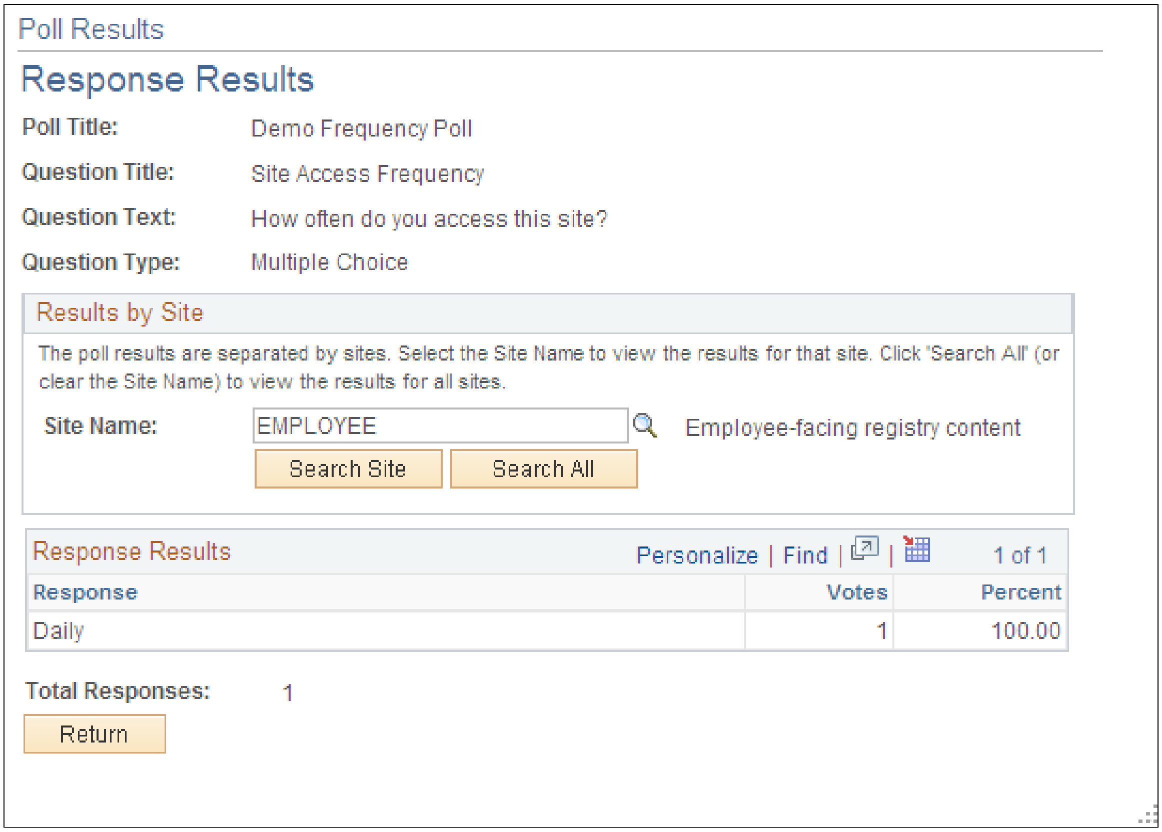
 

### Navigation

Click the Results link on the Poll Results page.

**Image: Response Results Page**

The following example illustrates the Response Results page. Access the Response Results page (click the Results link on the Poll Results page) as shown below.




The Response Results page displays the poll question information and the compiled answers to the question. If you have published the poll to multiple sites, you can search for results based on the site name or you can search all of the sites for responses to the poll.

## Respondent Comments Page

Use the Respondent Comments page (EPPSP_INQ_CMT_SEC) to view comments that respondents have submitted.

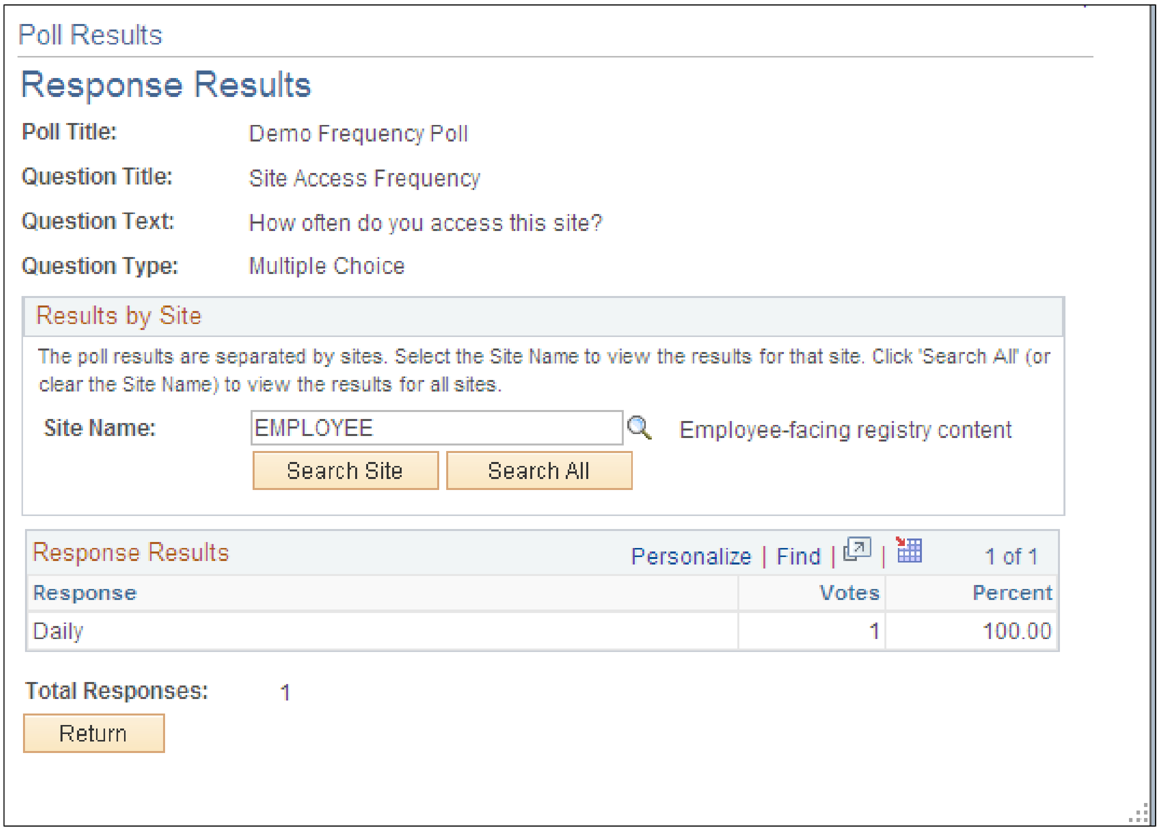
 

**Navigation**

Click the Comments link on the Poll Results page.

**Image: Respondent Comments Page**

The following example illustrates the Respondent Comments page.




Use this page to view lists of comments that users have entered. If you have published the poll to multiple sites, you can search for comments based on the site name or you can search all of the sites for comments. Comments appear in alphanumeric order based on user ID.

# Administering Polls

This topic discusses administering polls and changing privileges for polls.

## Page Used to Administer Polls

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| Administer Polls Page | EPPSP_ADM_POLL | Manage polls and user privileges. |

## Administer Polls Page

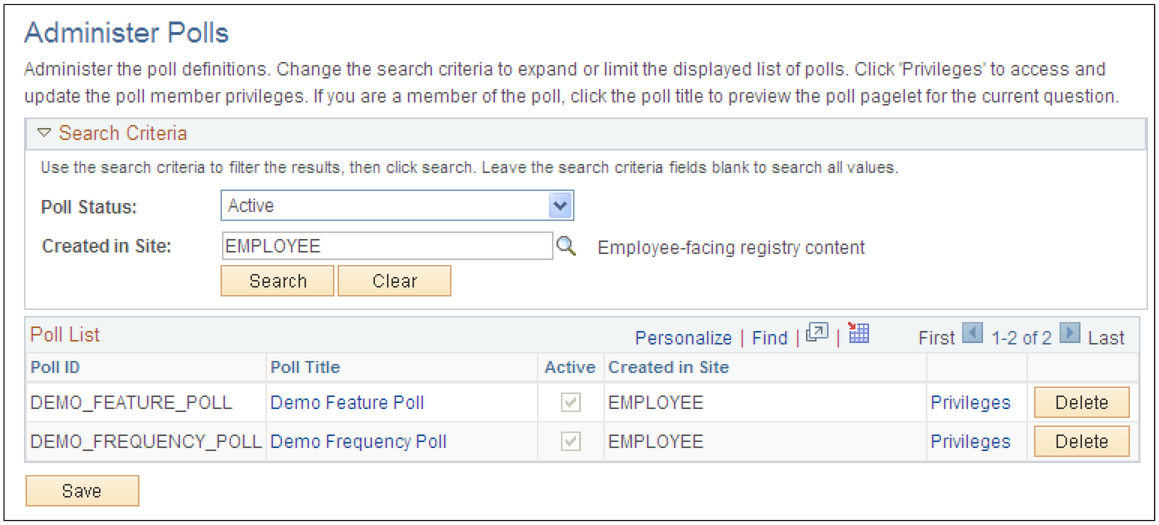
Use the Administer Polls page (EPPSP_ADM_POLL) to manage polls and user privileges.

### Navigation

Portal Administration, Administer Polls

### Image: Administer Polls Page

The following example illustrates the Administer Polls page. Access the Administer Polls page (Portal Administration, Administer Polls).




**Poll Status**

Select polls that are either *Active* or *Inactive*.

**Created in Site**

Select the name of the site in which the poll was created.

**Search**

Click this button to view the search results.

**Poll ID**

The system displays the ID of the poll.

**Poll Title**

Click the title of the poll to view the Preview Poll pagelet page.

---

**Note:** Titles will not be active unless you have security access to the poll.

---

**Privileges**

Select the Privileges link to access the Member Privileges page.

See Member Privileges Page.

**Delete**

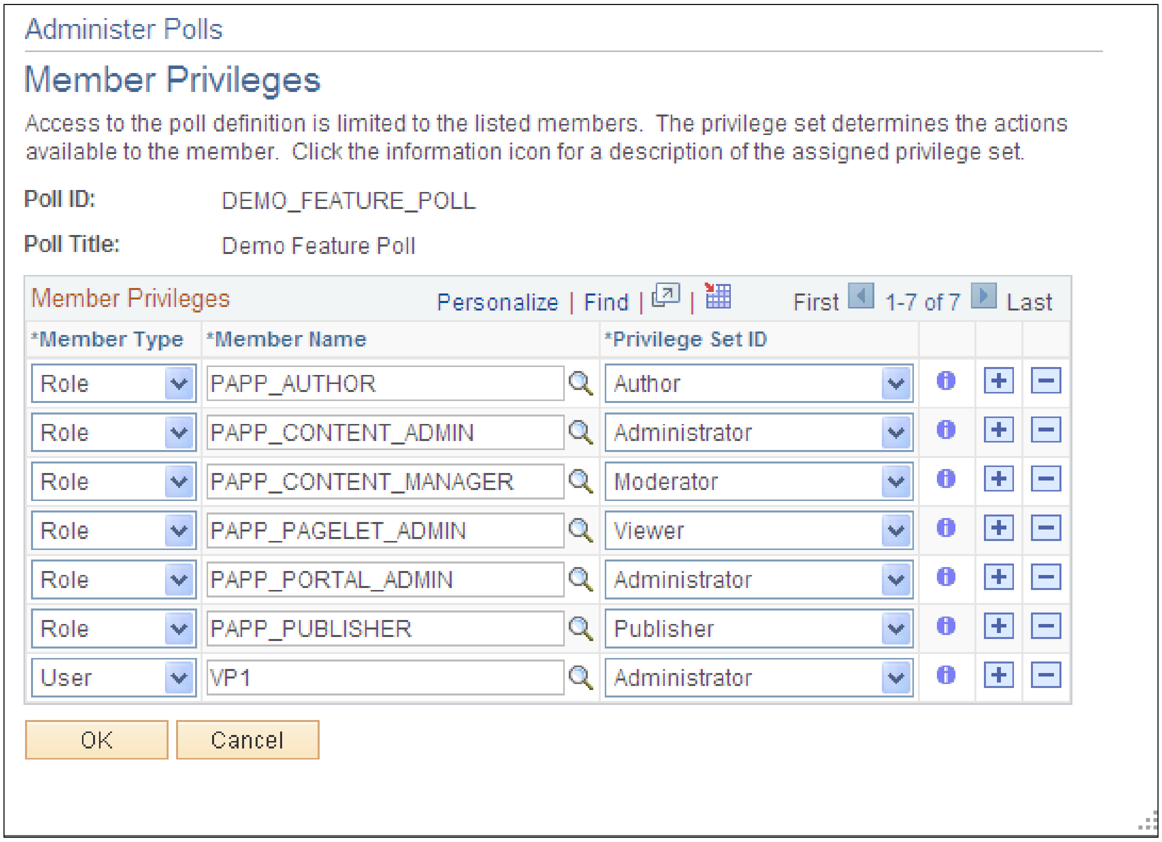
Click to delete the poll.

## Member Privileges Page

**Image: Member Privileges Page**

The following example illustrates the Member Privileges page. Access the Member Privileges page (Portal Administration, Administer Polls) as shown below.




**Member Type**

Select the type of participant you want to add to the poll. Available values include:

*Role.* Select to be able to select a role in the Member Name field. Available group names are derived from PeopleSoft roles defined in the Roles component.

See the product documentation for *PeopleTools: Security Administration*, “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 in the User Profiles component.

See the product documentation for *PeopleTools: Security Administration*, “Administering User Profiles.”

**Member Name**

The name of the member as defined in the Roles component or the list of users from the User Profiles component.

**Privilege Set ID**

Select a privilege level you want to assign to the member. Delivered values are:

*Author.*

Authors can view and add questions to a poll as well as edit and delete questions without responses.

*Administrator*. Administrators can add, edit, or delete action items, and action item lists. In addition, they can add and delete list members.

*Contributor*. Contributors can add or edit action items. They can delete their own action items, but not those belonging to others.

*Viewer*. Viewers have read-only access to the action items.

*Moderator.* A moderator can view, add, edit, and delete members, respondents, and questions for the poll. A moderator can also update metadata and view the poll results.

Click to view additional information about the actions that the privilege set enables the member to use.

## Chapter 13

# Gathering Feedback Using Surveys

## Understanding the Survey Feature

You can use the Survey feature to facilitate an organization's ongoing goal of encouraging and validating user input into processes and controls. For example, there may be a requirement to request feedback from the individuals who are directly involved in key business processes about how effective those processes are, and you can use the Surveys feature to request input on how they could be improved. The Survey feature enables you to create and distribute questionnaires, and evaluate the responses.

## Setting Up Survey Options

This section provides overviews of distribution lists, response types and values and discusses how to create distribution lists and establish response types.

### Pages Used to Set Up Surveys

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| Distribution List Page | EO_PE_SV_DSTRLST | Create distribution lists to use for surveys. |
| Response Type Page | EO_PE_SV_RESPTYP | Establish the responses for survey questions. |

### Understanding Distribution Lists

Distribution lists enable you to define a group of user IDs that are related in some way, such as department managers, to use as survey recipients. When you establish a survey, you can use distribution lists to specify who will receive the survey. Use of distribution lists is optional, because you can also specify survey recipients by selecting individual user IDs.

### Understanding Response Types and Response Values

Response types define the set of valid answers for a survey question. For example, an answer of either *yes* or *no* can be one response type. When you define the questions that are included on a survey, you specify their response type. This enables the system to list the possible valid answers to each question in the drop-down list box for generated surveys. When participants complete a survey, they select their response from this list. Several response types are delivered as system data; you can modify the delivered response types or create additional response types to suit a particular implementation.

Each response within a response type is associated with a numeric value. When you define a survey, you indicate what responses are expected or acceptable for each question. The system compares the expected response value with the actual responses to enable you to gauge whether responses match your expectations, and displays the information on the pages that you use to review the survey results.

For example, if the available responses and their corresponding values are 1 through 10, respectively, and 8 through 10 are acceptable, the expected response for a question would be ≥ 8. The Survey Summary page uses this range to indicate whether a response is expected. In the summary page, the expected column would display *Yes* for responses 8, 9, and 10 and *No* for the other responses.

This table lists the delivered response types:

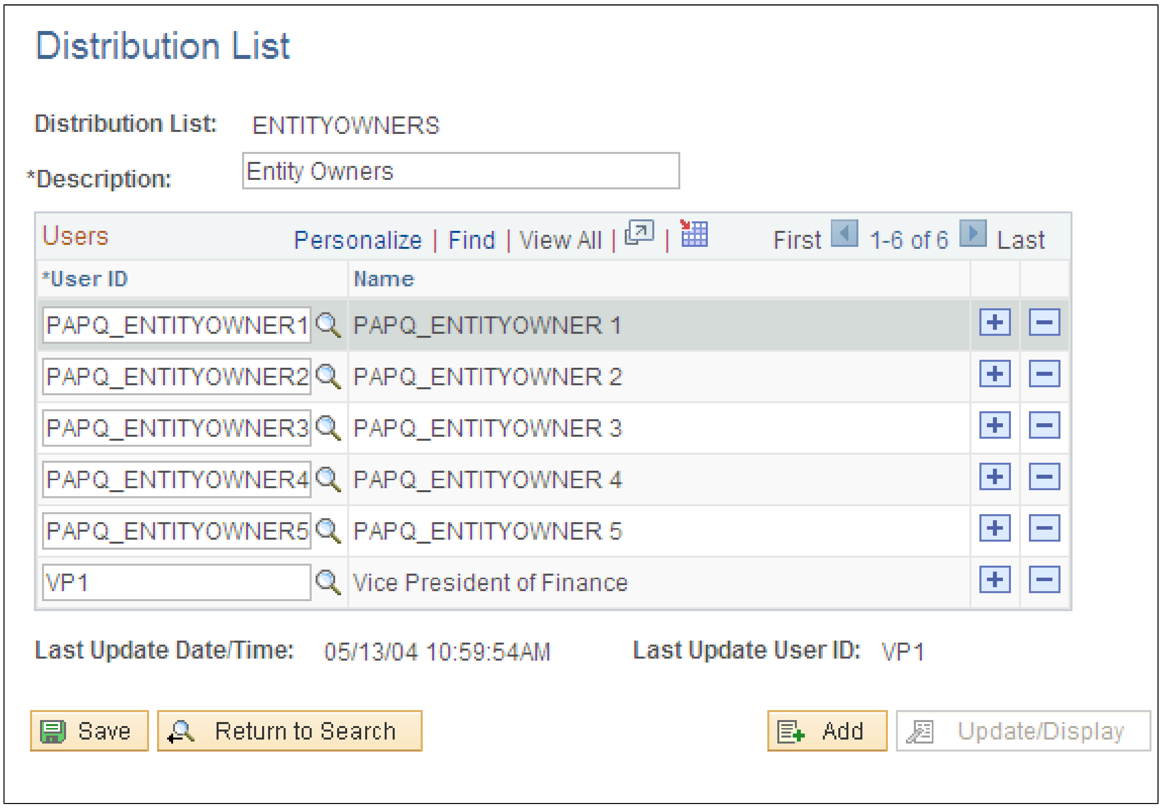
| ***Response Type ID*** | ***Description*** | ***Responses and Response Value ( in Parentheses)*** |
|---|---|---|
| 1 | Yes - No | No (1), Yes (2) |
| 2 | Strongly Agree - Strongly Disagree | Strongly Disagree (1), Disagree (2), No Opinion / Not Applicable (3), Agree (4), Strongly Agree (5) |
| 3 | Extremely Valuable - Irrelevant | Irrelevant (1), Not Valuable (2), No Opinion / Not Applicable (3), Valuable ( 4), Extremely Valuable (5) |
| 4 | Excellent - Poor | Poor (1), Fair (2), No Opinion / Not Applicable (3), Good (4), Excellent (5) |
| 5 | Scale 1-10 | 1, 2, 3, 4, 5, 6, 7, 8, 9, 10<br><br>The response values are equivalent to the responses. |
| 6 | Most Likely - Not Likely | Extremely Likely (10), Most Likely (20), Somewhat Likely (30), Unlikely (40), Not at all Likely (50) |

## Distribution List Page

Access the Distribution List Page (Portal Administration, Survey, Distribution List).

**Image: Creating Distribution Lists Page**

The following example illustrates the Distribution List page. Access the Distribution List page (Portal Administration, Survey, Distribution List) as shown below.




**Distribution List  and Description** — Enter a name and description for the distribution list. These appear in the selection list for the Distribution List field on the Survey Setup - Recipients page.

**User ID** — Insert rows in the Users grid, and specify the ID of each user who belongs to the distribution list.

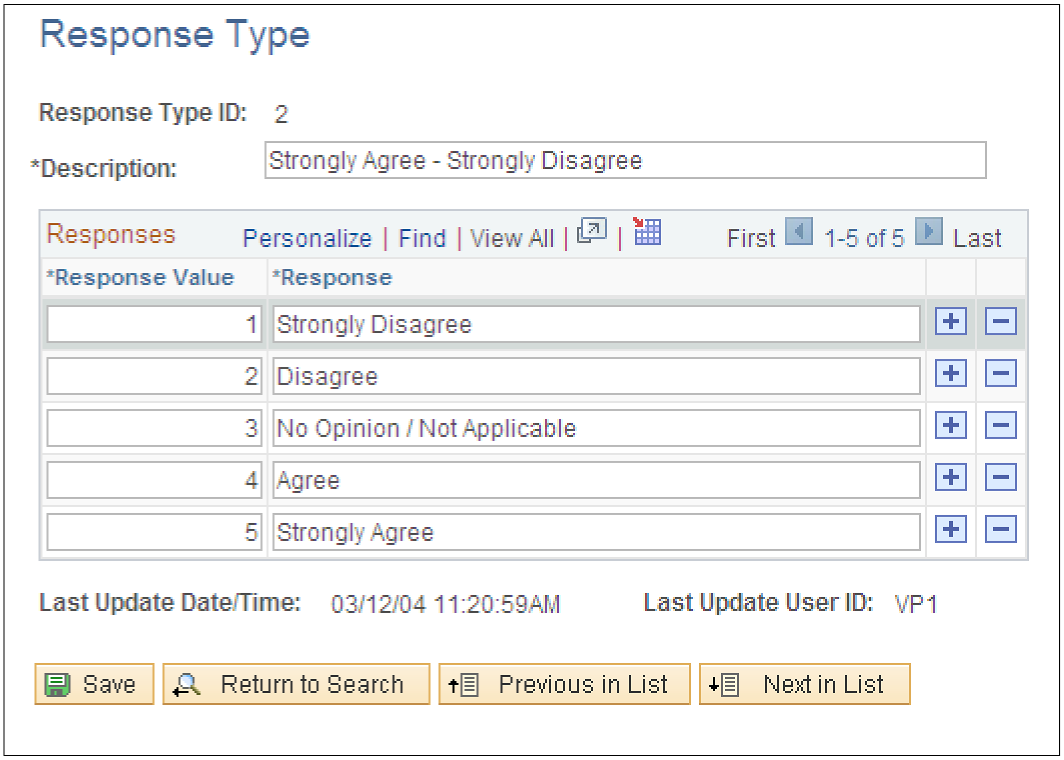
To specify the distribution lists for a survey, use the Survey Setup - Recipients page.

See Survey Setup - Recipients Page.

## Response Type Page

**Image: Response Type Page**

The following example illustrates the Response Type page. Access the Response Type page (Portal Administration, Survey, Response Type) as shown below.




| | |
|---|---|
| **Response Type ID** | Enter an identifier for the response type. |
| **Description** | Enter a description for the response type. The description appears in the selection list for the Response Type field for a question when you define a survey by using the Survey Setup page. |

### Responses

To specify the valid responses for this response type, add rows in the Response grid, and complete the following fields:

| | |
|---|---|
| **Response Value** | Enter the numeric value to use for this response. The system uses this value when determining if a particular response is acceptable or expected. |
| **Response** | Enter the response. The system displays the response in the drop-down list box for the Answer field for a distributed survey for questions associated with this response type. |

When you establish questions during survey setup, you can only select response types that have defined responses. Response types that have been saved but have no responses defined do not appear in the selection list for the Response Type ID field on the Survey Setup page.

# Creating and Distributing Surveys

This topic discusses how to create and distribute surveys.

Use the Survey Setup page (EO_PE_SV_DEFN) to establish a survey definition and identify survey questions.

**Navigation**

Portal Administration, Survey, Maintain Surveys, Survey Setup

Use the Survey Setup - Recipients page (EO_PE_SV_RC) to specify survey recipients using defined distribution lists and individual user IDs.

**Navigation**

Portal Administration, Survey, Maintain Surveys, Recipients

## Pages Used to Create and Distribute Surveys

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| Survey Setup Page | EO_PE_SV_DEFN | Establish a survey definition and identify survey questions. |
| Survey Setup - Recipients Page | EO_PE_SV_RC | Specify survey recipients using defined distribution lists and individual user IDs. |

## Understanding Survey Distribution

Once a survey is distributed, it becomes locked and no new questions can be added; however, you can still add new recipients and send them the survey, or copy the survey to create a new survey.

When surveys are distributed, the system sends recipients an email informing them that there is a survey that they need to complete, with a link to their survey. A blind carbon copy (BCC) option is available, to prevent the system from displaying the recipient names in the email that is generated. Recipients can click the link to access the survey and complete their responses to each question. Survey questions appear in ascending order based on the sequence number that was specified for each question when the survey was defined. The survey can be saved and edited by the recipients as needed while it is being worked on. After it is complete, the recipient submits it. Once submitted, the survey can't be modified. During this procedure, the system updates the survey status accordingly, assigning one of the following values:

- *Not Started.*

  The initial value for a survey when it is distributed.

- *In Progress.*

  The assigned value once a recipient saves a distributed survey.

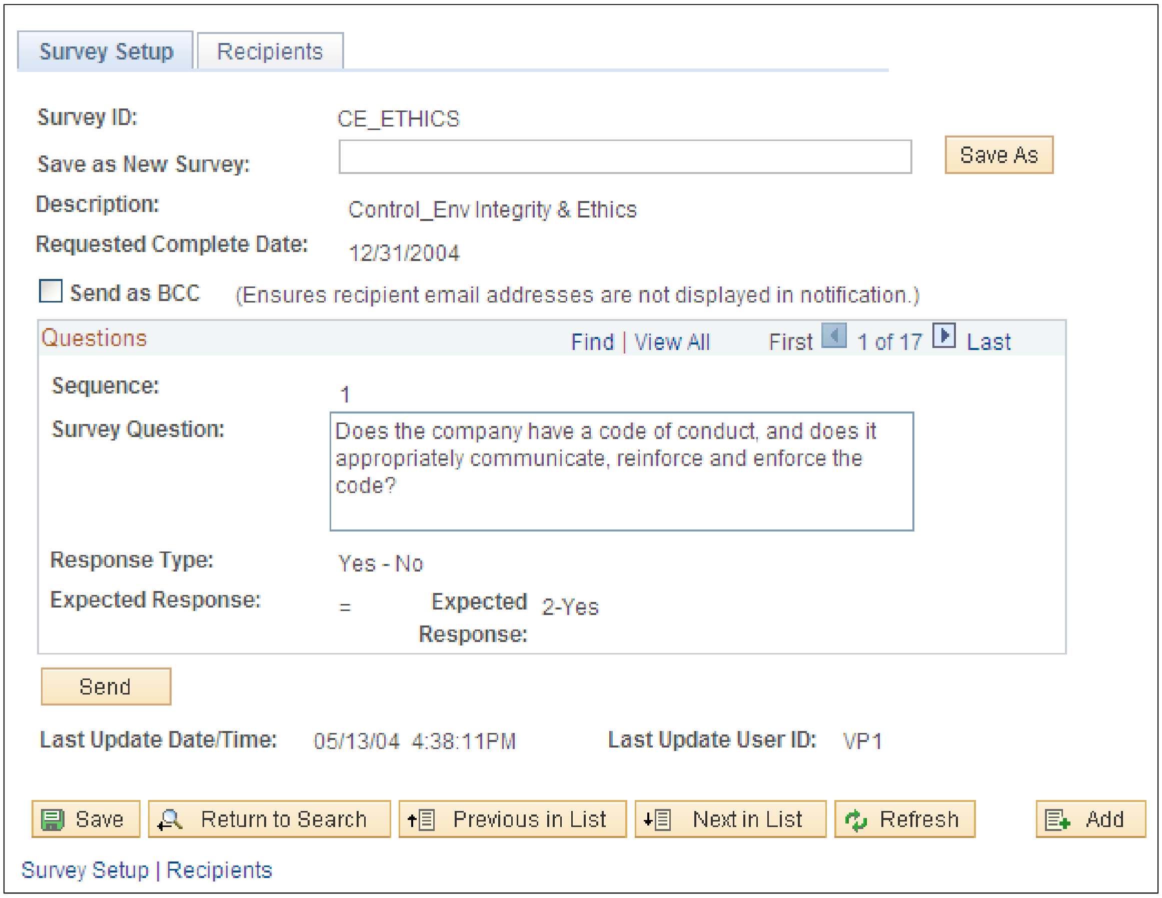
- *Completed.*

The assigned value once a recipient completes and submits a distributed survey.

## Survey Setup Page

**Image: Creating Surveys Page**

The following example illustrates the Survey Setup page. Access the Survey Setup page (Portal Administration, Survey, Maintain Surveys, Survey Setup) as shown below.




To set up a survey:

1. Specify the survey ID, description, and requested completion date.

| | |
|---|---|
| **Survey ID and Description** | Enter a survey identifier and a description of the survey. |
| **Requested Complete Date** | Enter the target completion date for the survey. This date does not affect any processing; it is provided only for your information. This field is unavailable for entry once the survey is sent. |
| **Send as BCC** | Select to display only the name of the email recipient in the survey notification emails. The names of the other individuals to whom the notification was sent will not appear. |

2. Define the survey questions.

For each question, indicate the associated response type and the expected response. These fields are unavailable for entry once the survey is sent.

For each survey question, complete the following fields:

| | |
|---|---|
| **Sequence** | Enter a numeric value to indicate the order in which the question will appear on the survey. The system displays questions in sequential ascending order using this number. |
| **Survey Question** | Enter the text of the survey question; the system enables up to 254 characters. |
| **Response Type** | Specify the valid response types for this question by selecting a response type description from the drop-down list box. Only response type IDs with defined responses appear in the list. |
| **Expected Response** | Indicate the acceptable or expected results for each question by selecting an operand and a valid response (based on the specified response type). |

3. Indicate who will receive the survey.

   You can use distribution lists and user IDs to define the survey recipients.

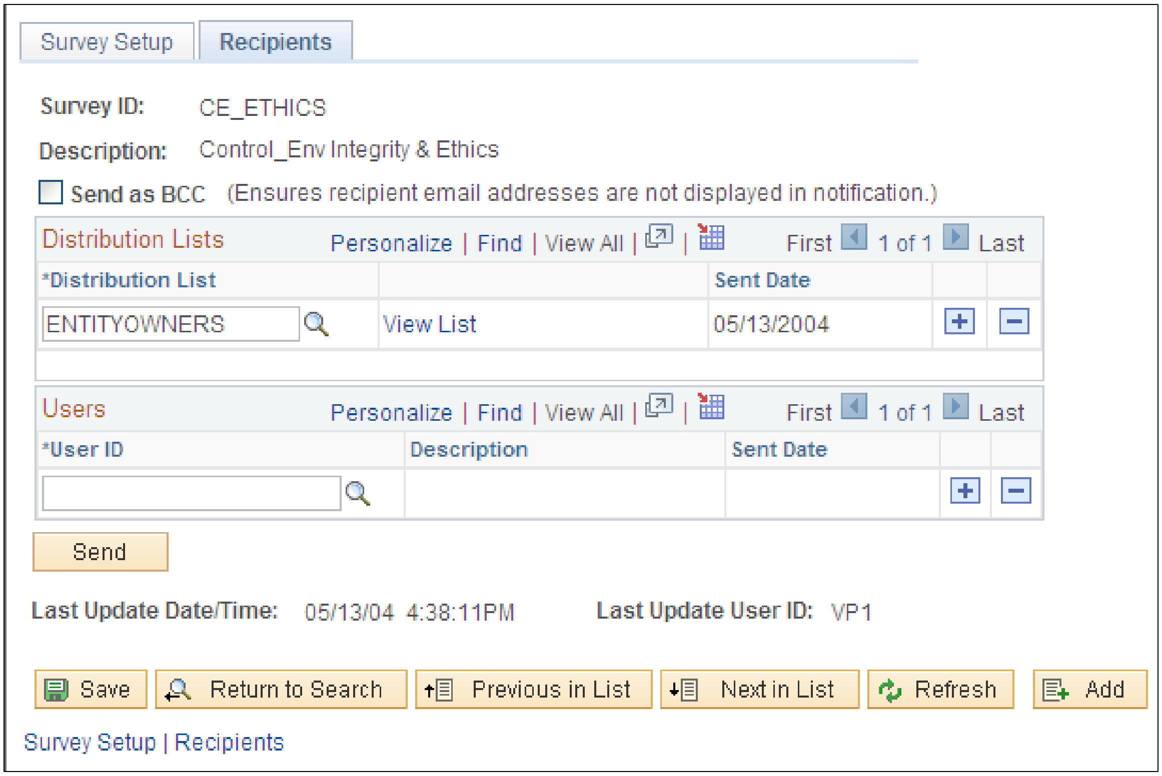
4. Save and distribute the survey.

| | |
|---|---|
| **Save as New Survey and Save As** | To create a new survey based on this survey, enter a name for the new survey, and then click Save As. A new survey definition page appears, where you can complete the survey definition.<br><br>You can also copy an existing survey to create a new survey using this button. |
| **Send** | Click to distribute the survey. You must define survey recipients by using the Survey Setup - Recipients page before you can send the survey. If you have already sent the survey, you can still add more recipients and click Send again; the system will distribute the survey to only the new recipients. |

## Survey Setup - Recipients Page

**Image: Survey Setup - Recipients Page**

The following example illustrates the Survey Setup - Recipients page. Access the Survey Setup - Recipients page (Portal Administration, Survey, Maintain Surveys, Recipients) as shown below.




You can specify survey recipients by individual user ID and by defined distribution lists.

| | |
|---|---|
| **Send as BCC** | Select to display only the name of the email recipient in the survey notification emails. The names of the other individuals to whom the notification was sent will not appear. |
| **Distribution List** | To specify survey recipients by distribution lists, insert rows in the this grid and select the distribution list for each inserted row. |
| **View List** | Click to access the Distribution List page, where you can view the user IDs that are included in the distribution list. |
| **User ID** | To specify survey recipients by user IDs, insert rows in this grid and select the user ID for each inserted row. |
| **Sent Date** | If the survey has been sent, this field displays the date on which the survey was sent to a particular user ID or distribution list. |
| **Send** | Click to distribute the survey. If you have already sent the survey, you can still add more recipients and click Send again; the system will distribute the survey to only the new recipients. |

# Completing Surveys

This section discusses how to complete surveys.

Use the Survey page (EO_PE_SV_FILLSVY) to complete distributed surveys.

**Navigation**

- Click the link from the email notification for the survey.
- Take a Survey

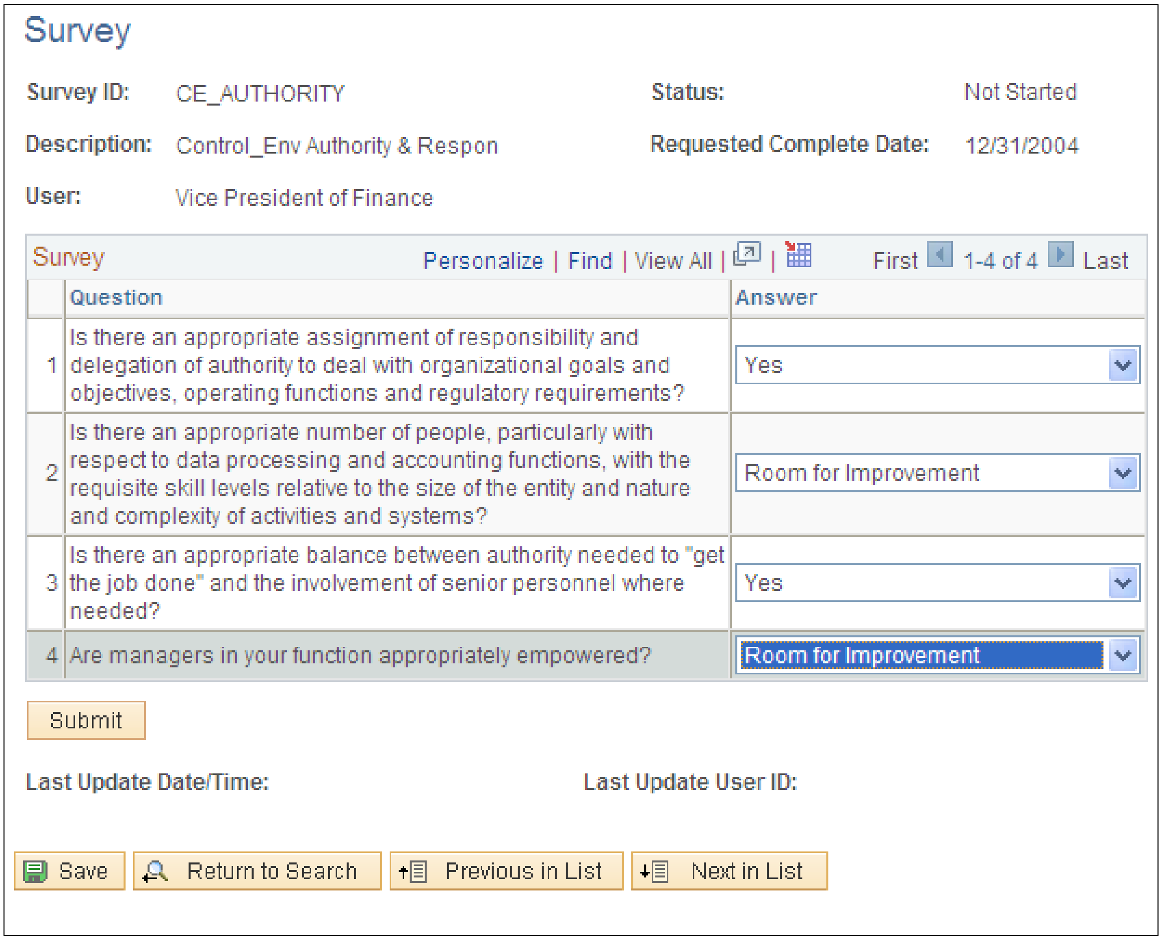
## Page Used to Complete Surveys

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| Survey Page | EO_PE_SV_FILLSVY | Complete distributed surveys. |

## Survey Page

**Image: Completing Surveys Page**

The following example illustrates the Survey page. Access the Survey page (click the link from the email notification for the survey) or (Take a Survey) as shown below.




To complete the survey:

1. Select the answer to each question from the drop-down list box.
2. Save the survey if you need to finish it at a later time.

   The system stores your in-progress work.
3. Click Submit to indicate that you have completed the survey.

Once you submit the survey, you can't modify any answers.

# Reviewing Survey Results

This topic describes reviewing overall survey responses, individual survey responses and survey status by user.

## Pages Used to Review Survey Results

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| Survey Summary Page | EO_PE_SV_SUMMARY | Review the survey completion status and the percentage of responses for each survey question. |
| Survey Summary - Recipients Page | EO_PE_SV_SUMMRYRCP | Review the survey completion status, and the response status for each recipient. |
| Response Detail Page | EO_PE_SV_RESDTL | View each recipient's response to a survey question. |
| User Response Page | EO_PE_SV_FILLSVY | View a single user ID's responses to all survey questions. |
| Contact Information Page | EO_PE_SV_CONTACT | Send an email to the user. Click the User link on the User Response page.<br><br>See User Response Page |

## Understanding Survey Results

The Survey Summary component (EO_PE_SV_SUMMARY) displays survey results. It enables you to:

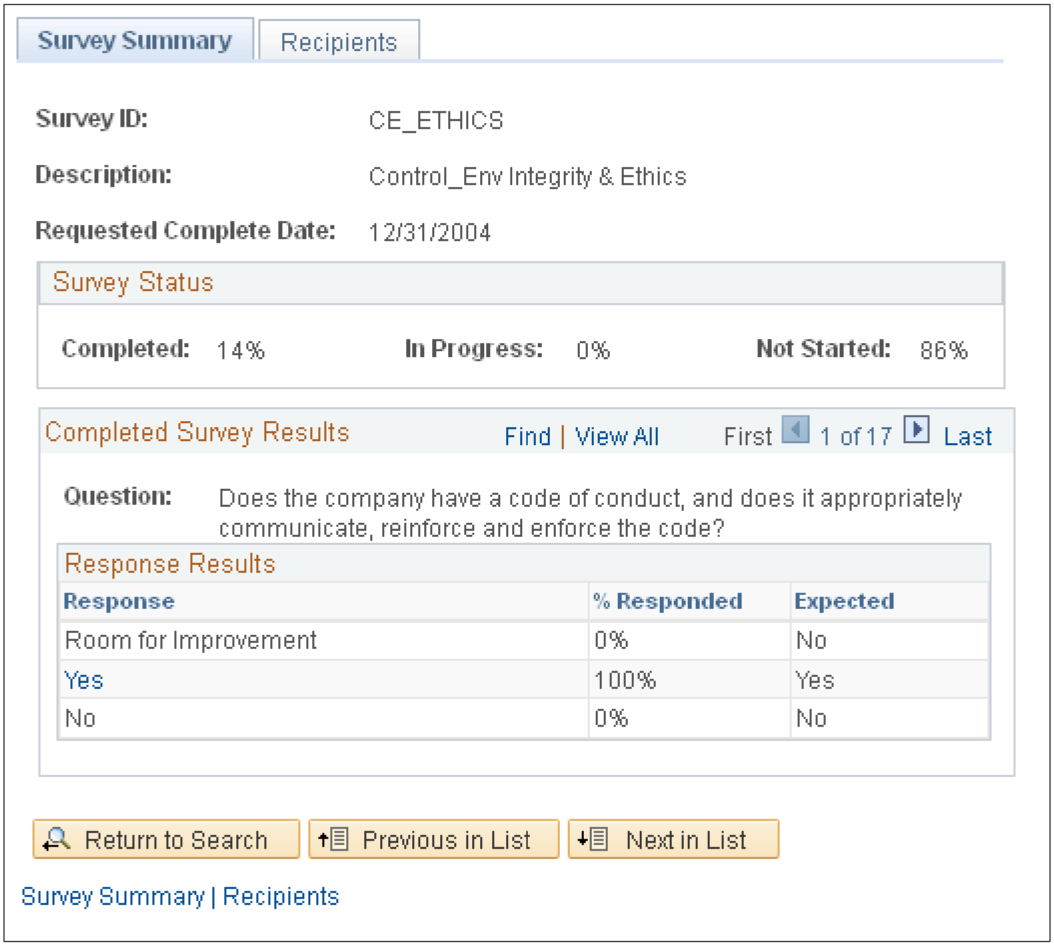
- View the completion status of a survey.
- View the response percentages for each question.
- View the list of recipients who chose a particular response.
- View individual responses.

## Survey Summary Page

Access the Survey Summary page (Portal Administration, Survey, Survey Summary, Survey Summary) as shown below.

**Image: Survey – Survey Summary page**

This example illustrates the fields and controls on the Survey – Survey Summary page. You can find definitions for the fields and controls later on this page.




### Survey Status

**Completed** Displays the percentage of surveys that have been submitted.

**In Progress** Displays the percentage of surveys that have been accessed and saved but have not yet been submitted.

**Not Started** Displays the percentage of surveys that have not been accessed and saved.

### Completed Survey Results

For each survey question, the system displays the results, distributed by response.

**Response**

Displays the response description.

Click the response description to access the Response Detail page, where you can view the list of all individuals (user IDs), if any, who chose this response.

**% Responded**

Displays the percentage of recipients that responded with this answer.

**Expected**

If this response meets the expected results criteria, this field displays *Yes,* otherwise it displays *No.*This is based on the expected results defined for this survey.

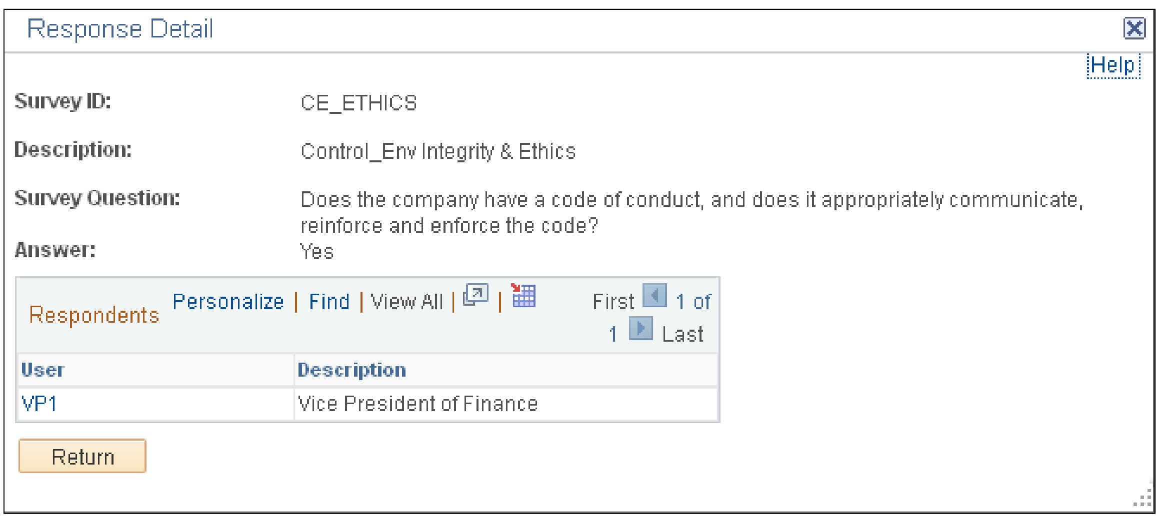
See Survey Setup Page.

## Response Detail Page

Access the Response Detail page (click the link for the response on the Survey Summary page) as shown below.

**Image: Response Detail page**

The following example illustrates the Response Detail page.




This page lists all users who responded to the survey question with a particular answer.

Click a user ID to access the User Response page, where you can review the user's response to all survey questions.

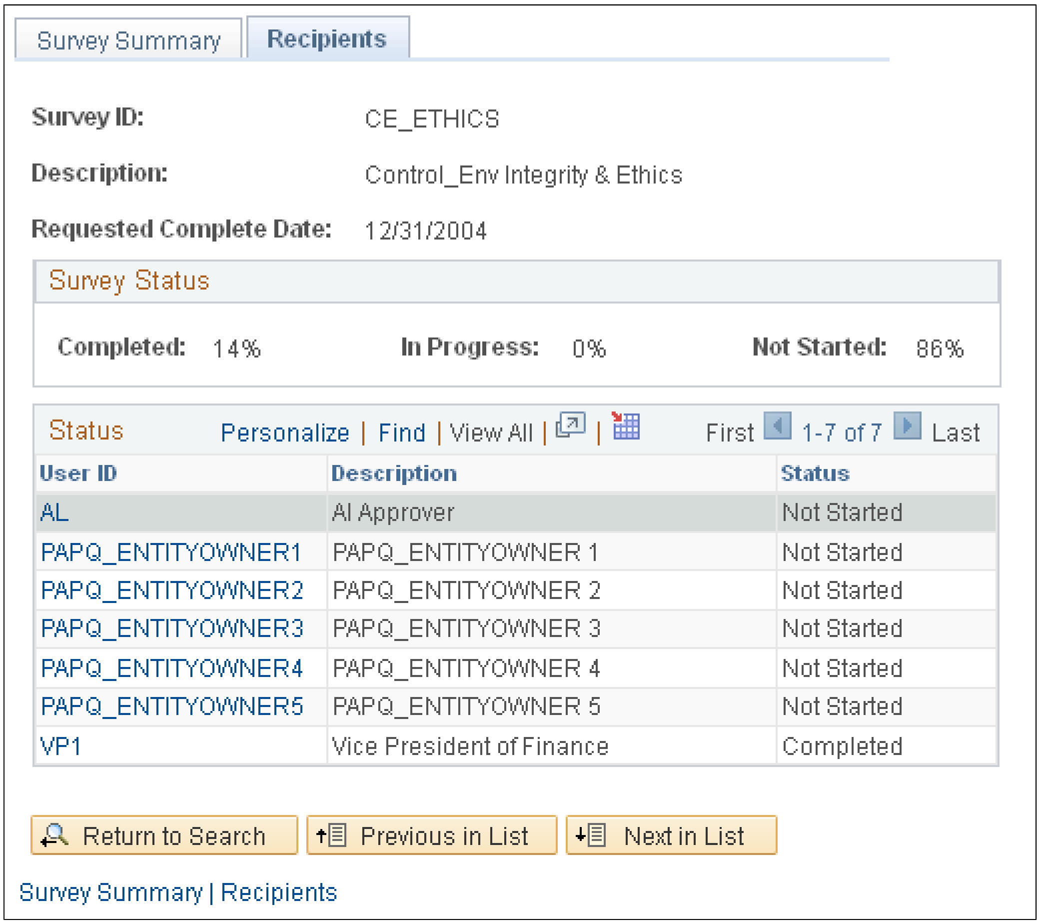
 

## Survey Summary - Recipients Page

Access the Survey Summary - Recipients page (Portal Administration, Survey, Survey Summary, Recipients) as shown below.

**Image: Survey Summary - Recipients page**

The following example illustrates the Survey Summary - Recipients page.




### Survey Status

This group box details the current status of the survey.

See Survey Summary Page.

### Status

**User ID**

Displays the recipient's user ID.

Click to access the User Response page, where you can view the user's responses to every survey question.

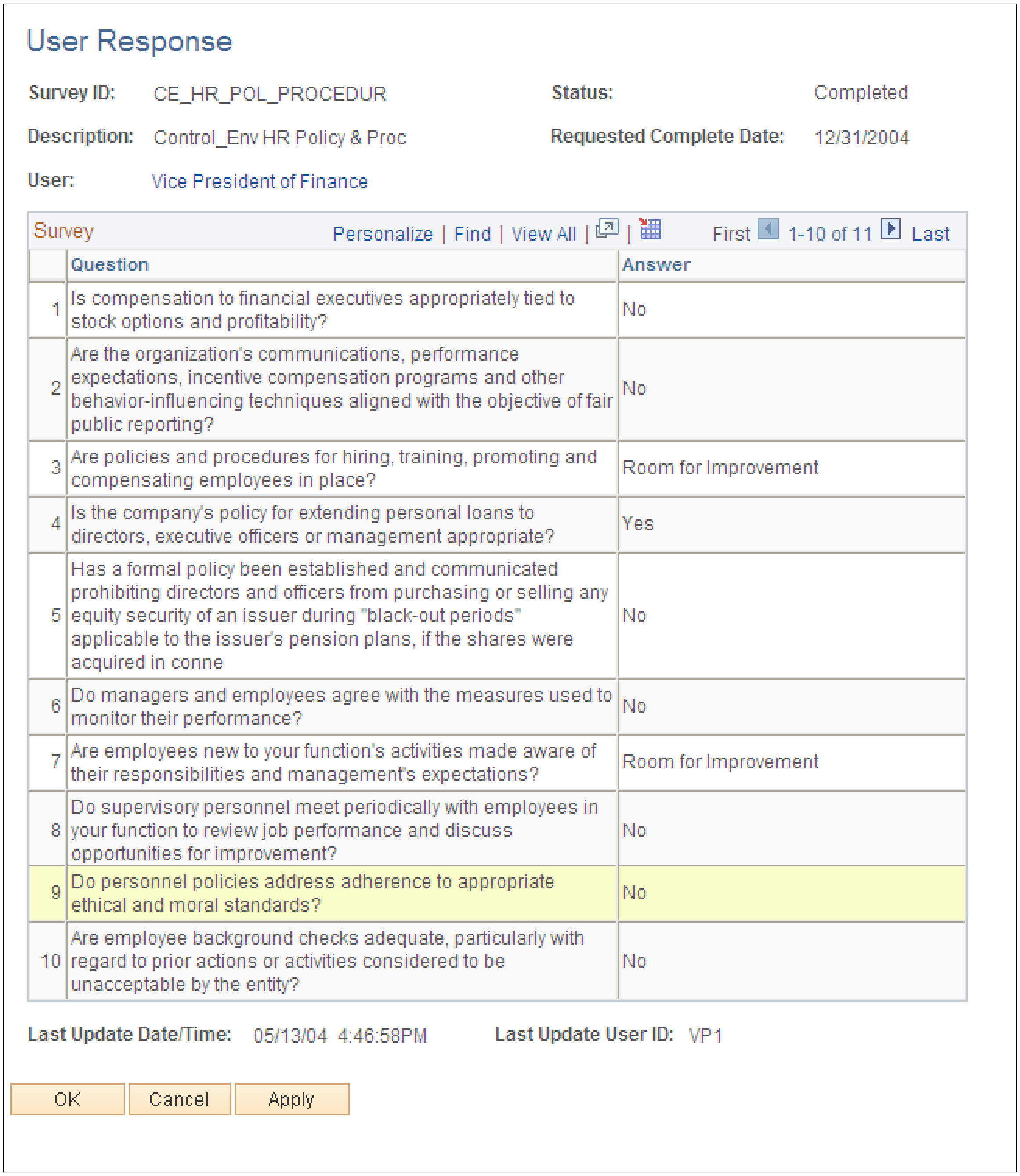
**Status**

Displays the survey completion state for the user. Values are: *Not Started, In Progress,* and *Completed.*

## User Response Page

**Image: User Response Page**

The following example illustrates the User Response page. Access the User Response page (click the link for the user ID on the Recipients page) as shown below.



User Response

Survey ID: CE_HR_POL_PROCEDUR    Status: Completed

Description: Control_Env HR Policy & Proc    Requested Complete Date: 12/31/2004

User: Vice President of Finance

Survey    Personalize | Find | View All |    First 1-10 of 11 Last

| | Question | Answer |
|---|---|---|
| 1 | Is compensation to financial executives appropriately tied to stock options and profitability? | No |
| 2 | Are the organization's communications, performance expectations, incentive compensation programs and other behavior-influencing techniques aligned with the objective of fair public reporting? | No |
| 3 | Are policies and procedures for hiring, training, promoting and compensating employees in place? | Room for Improvement |
| 4 | Is the company's policy for extending personal loans to directors, executive officers or management appropriate? | Yes |
| 5 | Has a formal policy been established and communicated prohibiting directors and officers from purchasing or selling any equity security of an issuer during "black-out periods" applicable to the issuer's pension plans, if the shares were acquired in conne | No |
| 6 | Do managers and employees agree with the measures used to monitor their performance? | No |
| 7 | Are employees new to your function's activities made aware of their responsibilities and management's expectations? | Room for Improvement |
| 8 | Do supervisory personnel meet periodically with employees in your function to review job performance and discuss opportunities for improvement? | No |
| 9 | Do personnel policies address adherence to appropriate ethical and moral standards? | No |
| 10 | Are employee background checks adequate, particularly with regard to prior actions or activities considered to be unacceptable by the entity? | No |

Last Update Date/Time: 05/13/04 4:46:58PM    Last Update User ID: VP1

OK    Cancel    Apply

This page lists the user's current responses to each question. Click the user ID description to access the Contact Information page for this individual, and send the individual an email.

## Chapter 14

# Using External Email, Calendar Data, and Instant Messaging

## Understanding the Email Pagelet and Calendar Events Pagelet

PeopleSoft Interaction Hub offers homepage pagelets that enable users to access email and calendar information without leaving the portal. The portal administrator sets up a default mail system and can also (optionally) enable external Post Office Protocol 3 (POP3) mail systems. Users then configure their own homepage Email pagelet and Calendar Events pagelet with their IDs and passwords. If multiple mail systems are enabled, users can include mail from multiple systems on their Email pagelet.

Because the Email pagelet and Calendar Events pagelet share the same integration technology, users need to install and set up these pagelets only once. For the homepage, however, users must separately select each pagelet that is to be included.

### Email Integration

The Email pagelet displays a list of the latest email messages. If the email system is web-enabled, users can navigate to that email system from a link on the pagelet. Integrations are delivered for these servers:

- Internet Message Access Protocol (IMAP).
- Lotus Domino.
- Microsoft Exchange 2003 and 2007.
- Post Office Protocol (POP).

In the Email pagelet, you can have one primary external email system: an IMAP, Lotus Domino, Microsoft Exchange, or POP server. In addition, POP-enabled mail can also be used as a secondary email system.

### Calendar Integration

The Calendar Events pagelet displays appointments for the current day. Integrations are delivered for:

- Lotus Domino.
- Microsoft Exchange 2003 and 2007.

### Instant Messaging

Users that are utilizing instant messaging functionality will need to have an instant messaging client installed on the machine from which they're accessing the PeopleSoft Interaction Hub product.

# Working With the Email Pagelet

This topic discusses personalizing and using your Email pagelet and adding an additional email account.

## Pages Used to Work With the Email Pagelet

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| Personalize Email Options Page | EO_PE_EML_PREF | Specify the employee user email ID and password and the number of most recent email messages that should appear on the Email pagelet.<br><br>See Personalizing Email Options Page. |
| Update a Personal Email Account Page | EO_PE_EML_OTHR | Edit an existing personal email account supplying data to your Email pagelet. The fields on this page are the same as those on the Add a Personal Email Account page.<br><br>See Personalizing Email Options Page. |
| Add a Personal Email Account Page | EO_PE_EML_OTHR | Add a new personal external email account. Add any number of POP3 mail accounts |

"Integrating With Lotus Notes Email and Calendar" (PeopleSoft Interaction Hub 9.1: Portal and Site Administration)

## Personalizing Email Options Page

Use the Personalize Email Options page (EO_PE_EML_PREF) to specify the employee user email ID and password and the number of most recent email messages that should appear on the Email pagelet.

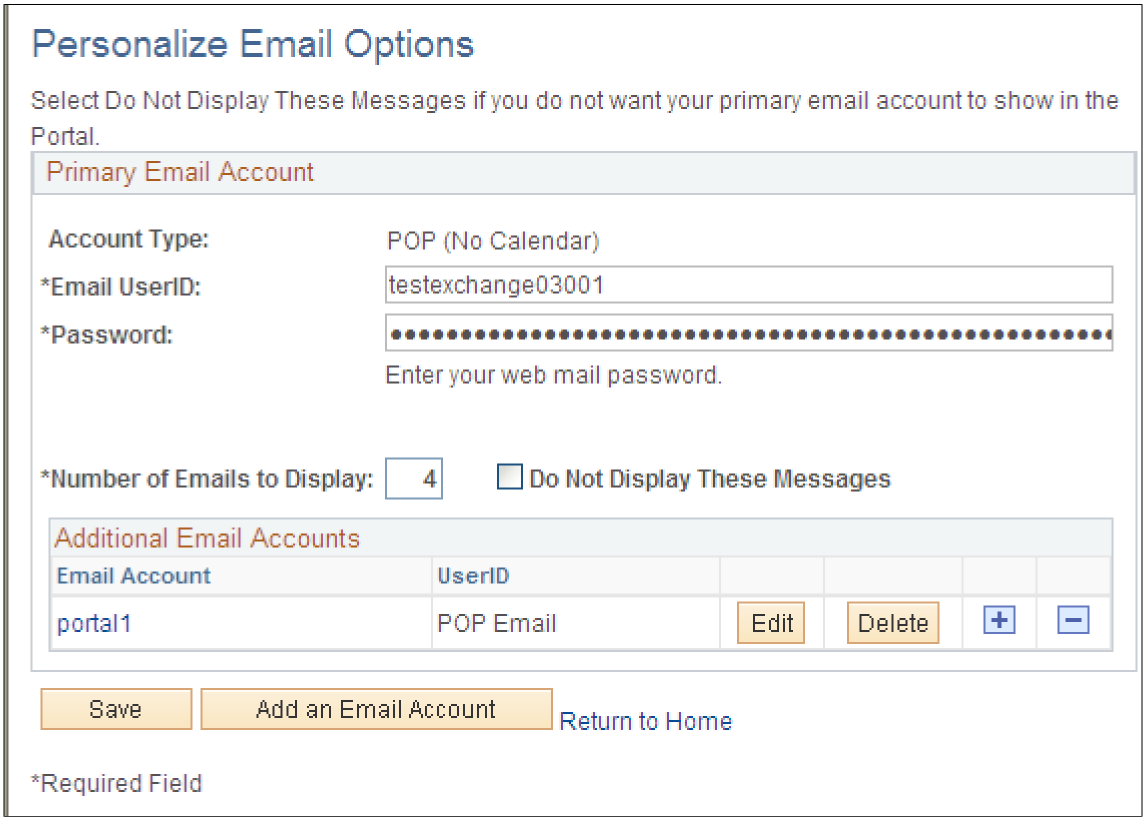
 

**Navigation**

Click the Customize icon on the Email pagelet.

**Image: Personalizing Your Email Pagelet page**

This example illustrates the fields and controls on the Personalizing Your Email Pagelet page. You can find definitions for the fields and controls later on this page.




## Primary Email Account

Use the fields in the Primary Email Account group box to enter information regarding your email account supplied by your organization's designated primary email system.

**Email UserID**

Enter the user ID that corresponds to the mail type.

**Note:** For Lotus Notes user ID, the domain needs to be specified after the user name (for example, Bob Jones/CORP).

**Mail Box**

Displays if you are using Microsoft Exchange 2003 or 2007. Enter your mailbox name.

**Number of Emails to Display**

Enter the number of messages to display on the pagelet.

**Do Not Display These Messages**

Select to have no messages appear on the pagelet. Use this feature to temporarily hide an email account.

### Additional Email Accounts

Use the Additional Email Accounts group box to add external POP3 mail accounts to your Email pagelet.

| | |
|---|---|
| **Email Account** | This field displays after you have set up at least one email profile on the Add a Personal Email Account page. Click the account name link to access the Update a Personal Email Account page. |
| **UserID** | The user ID whose mail messages will appear in the pagelet. |
| **Edit** | Click to access the Update a Personal Email Account page, where you can change the email account setup information. |
| **Delete** | Click to permanently remove the email account from the pagelet. You will be prompted to confirm the deletion. |
| **Add an Email Account** | Click to access the Add a Personal Email Account page, where you can add new email accounts. The portal administrator predefines the account choices. |

**Note:** All password and ID information is stored using common functions for password data store.

## Add a Personal Email Account Page

Use the Add a Personal Email Account page (EO_PE_EML_OTHR) to add a new personal external email account.

Add any number of POP3 mail accounts.

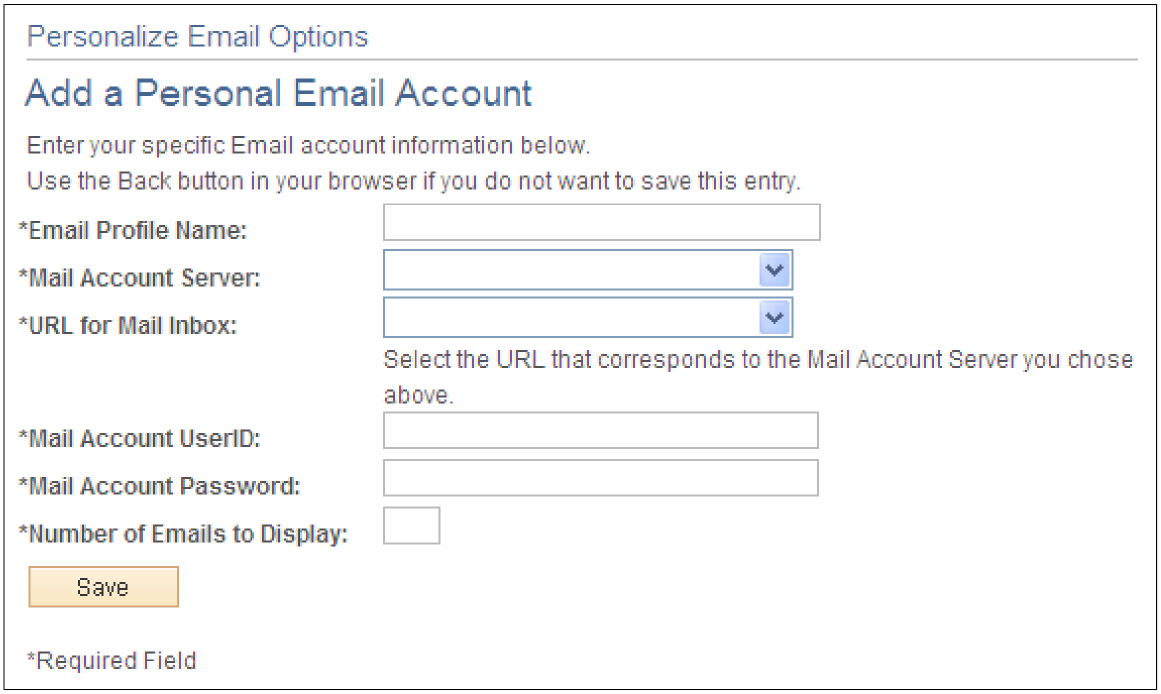
 

**Navigation**

Click the Add an Email Account button on the Personalize Email Options page.

**Image: Add a Personal Email Account Page**

This example illustrates the fields and controls on the Add a Personal Email Account Page. You can find definitions for the fields and controls later on this page.




| | |
|---|---|
| **Email Profile Name** | Enter a unique email profile name. This is the mail identifier that appears in the pagelet. |
| **Mail Account Server** | Select the appropriate server. The portal administrator adds POP3 email servers to this list on the URL Maintenance page. |
| **URL for Mail Inbox** | Select the appropriate mail URL. The portal administrator adds URLs to this list on the URL Maintenance page.<br><br>**Note:** Ensure that the URL selection corresponds to the mail account server. |
| **Mail Account UserID** | Enter the email user ID. |
| **Mail Account Password** | Enter the email password. |
| **Number of Emails to Display** | Specify the number of emails the system should display on the Email pagelet for this mail profile. |

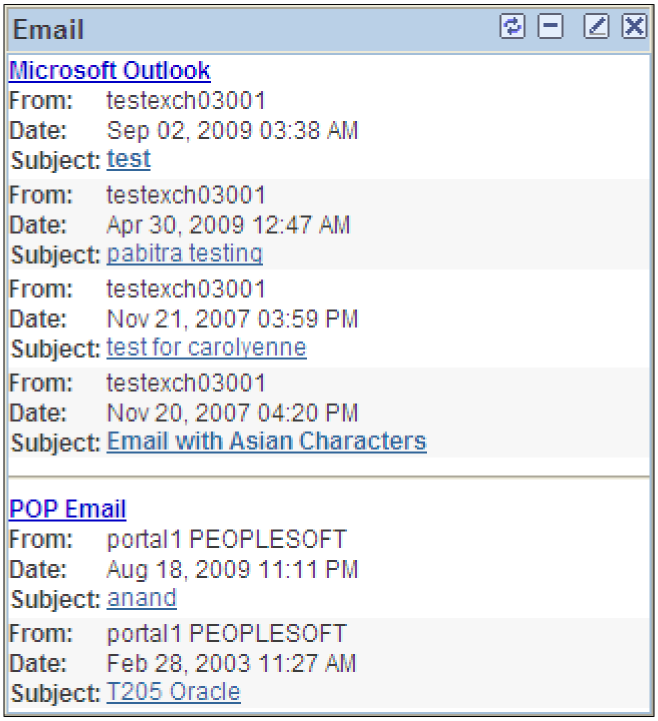
**Note:** The email account must enable POP access and forwarding for it to display on the Email pagelet. Check your profile with the POP mail vendor.

## Email Pagelet

Access the Email pagelet on the portal homepage.

**Image: Email pagelet**

The following example illustrates the Email pagelet.




The Email pagelet displays a list of your latest email messages.

In the preceding example, the Email pagelet uses Microsoft Outlook as the primary email service and a POP server as a secondary service.

| | |
|---|---|
| **<Server Name>** | Click the link for a server to access the server's URL in a separate browser window. |
| **Subject** | Click the link for a subject to open that message in a separate browser window. |

# Working With the Calendar Events Pagelet

This topic discusses personalizing and using the Calendar Events pagelet.

Use the Personalize Calendar Options page (EO_PE_CAL_PREF) to enter data that allows the Calendar Events pagelet to display your calendar data.

**Navigation**

Click the Customize icon on the Calendar Events pagelet.

## Page Used to Personalize the Calendar Events Pagelet

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| Personalize Calendar Options Page | EO_PE_CAL_PREF | Enter data that allows the Calendar Events pagelet to display your calendar data. |

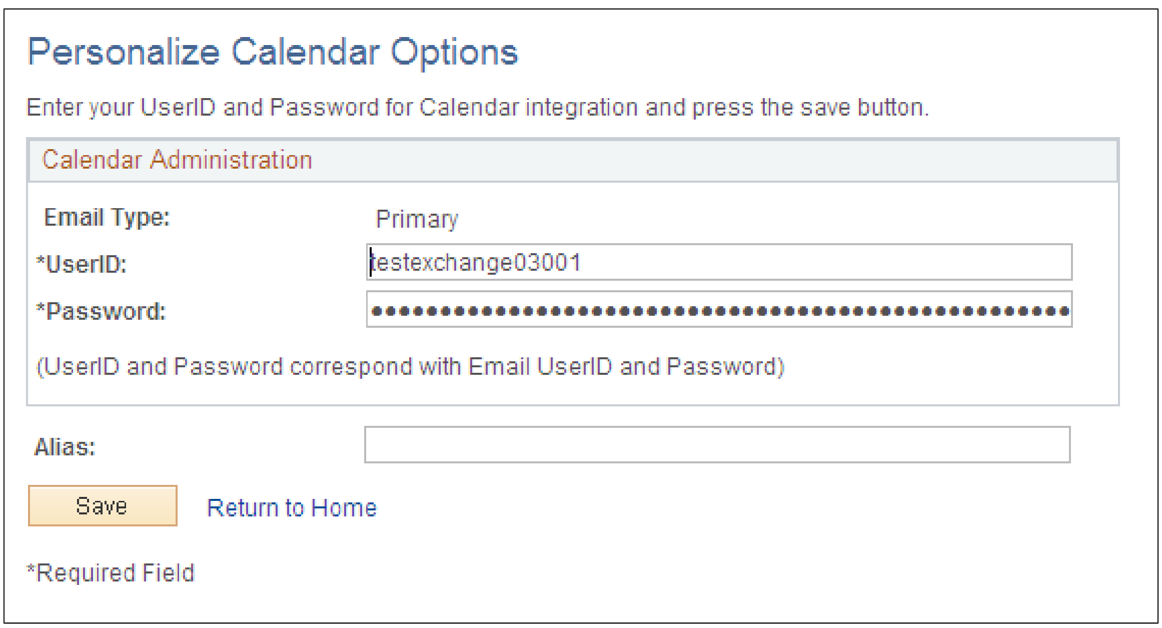
"Integrating With Lotus Notes Email and Calendar" (PeopleSoft Interaction Hub 9.1: Portal and Site Administration)

## Personalize Calendar Options Page

Access the Personalize Calendar Options page (click the Customize button on the Calendar Events pagelet).

**Image: Personalizing Your Calendar Events pagelet**

This example illustrates the fields and controls on the Personalizing Your Calendar Events pagelet. You can find definitions for the fields and controls later on this page.




**UserID** Enter the user ID that corresponds to the account type.

**Password** Enter your password.

**Note:** For Lotus Notes users, use the internet password. This password is stored in the Person document in the Lotus Name and Address Book on the Domino server.

**Mail Box** Displays if you are using Microsoft Exchange 2003 or 2007. Enter your mailbox name.

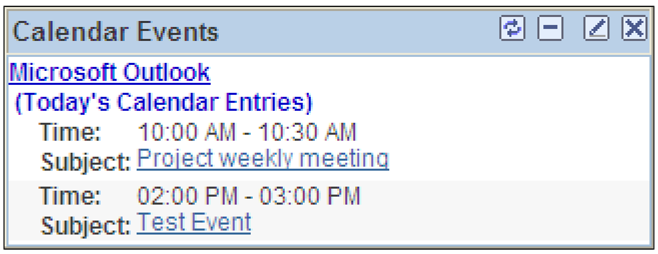
**Alias** This field displays when the Email Type field value is set to *Microsoft Outlook.* Enter the same alias value that was defined in the active directory setup for the user. This value is used to define the Outlook Web Access/Exchange Server URL. If this field is left blank, then the mailbox name is used to generate the URL.

## Calendar Events Pagelet

Access the Calendar Events Pagelet on the portal homepage.

**Image: Calendar Events pagelet**

This example illustrates the fields and controls on the Calendar Events pagelet. You can find definitions for the fields and controls later on this page.




The Calendar Events pagelet displays appointments for the current day.

| | |
|---|---|
| **<Server Name>** | Click the link for a server to access the server's URL in a separate browser window. |
| **Subject** | Click the link for a subject to open that event in a separate browser window. |

# Entering Your Instant Messaging Information

This section discusses how to enter your instant messaging information.

Use the My Instant Messaging Information page (EPPRC_IM_USER) to add, edit, or delete your instant messaging information, such as your available screen names and domains.

**Navigation**

Select the My Instant Messaging link that displays as a top-level link in the menu.

## Page Used to Enter Your Instant Messaging Information

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| My Instant Messaging Information Page | EPPRC_IM_USER | Add, edit, or delete your instant messaging information, such as your available screen names and domains. |

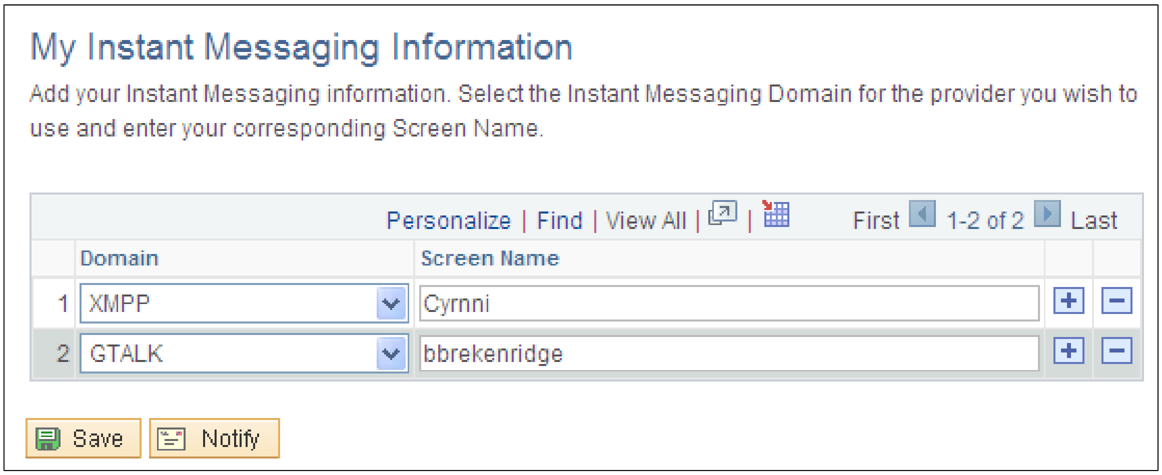
 

## My Instant Messaging Information Page

Access the My Instant Messaging Information page (My Instant Messaging).

**Image: My Instant Messaging Information page**

This example illustrates the fields and controls on the My Instant Messaging Information page. You can find definitions for the fields and controls later on this page.




**Domain**

Select the domain for which you want to define instant messaging information.

- *GTALK* — Google Talk.
- *SAMETIME* — IBM Lotus Sametime.
- *XMPP* — Extensible Messaging and Presence Protocol.
- *YAHOO* — Yahoo! Messenger.

**Screen Name**

Enter your screen name for the selected domain.

## Chapter 15

# Submitting and Editing Menu Item Requests

## Understanding Menu Item Requests

Menu items are pages, websites, or files accessible from the navigation menu. PeopleSoft Interaction Hub's Menu Item Requests feature enables portal users to contribute information to their organization's intranet by submitting a menu item request for a file attachment, managed content, a website Uniform Resource Locator (URL), or a PeopleSoft URL.

The Menu Item Requests feature contains three levels of security, which allow users to submit menu item requests, managers to approve or reject the requests, and the portal administrator to register approved requests. Security for this feature is based on the following three permission lists, which are delivered with your software:

- PAPP4100.

  Submit menu item requests.

- PAPP4020.

  Approve and manage menu item requests.

- PAPP4025

  Register menu item requests.

Oracle also delivers user roles that are configured to perform PeopleSoft Interaction Hub functions. The following three roles have been configured to include menu item functions:

| ***Role*** | ***Role Description*** |
|---|---|
| PAPP_AUTHOR | Content Author |
| PAPP_NAVIGATION_MANAGER | Navigation Manager |
| PAPP_NAVIGATION_ADMIN | Navigation Administrator |

The Menu Item Requests feature can be set up to send email notifications of status changes to menu item requests. Manager notifications are sent for newly submitted requests pending review and approval. Administrator notifications are sent for approved requests pending portal registration.

See the product documentation for *PeopleTools: Security Administration*

"Defining Site Security" (PeopleSoft Interaction Hub 9.1: Portal and Site Administration)

"Delivered PeopleTools Roles" (PeopleSoft Interaction Hub 9.1: Portal and Site Administration)

# Searching for Menu Item Requests

This topic discusses searching for menu item requests.

## Pages Used to Search for Menu Item Requests

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| Submit Menu Items Page | EPPMI_SUBMIT_LST | Search for menu item requests to review, delete, or edit.<br><br>See Submitting Menu Items. |
| Delete Confirmation Page | EO_PE_DEL_CONFIRM | Confirm deletion of a requested menu item.<br><br>See Submitting Menu Items. |
| Edit Menu Item Request Page | EPPMI_ITM_EDIT | Add a new menu item request, or edit an existing request in *Draft*, *Submitted*, or *Rework* status or approve&register or approve the menu item request.<br><br>See Submitting Menu Items. |
| View Menu Item Request Page | EPPMI_ITM_VIEW | View an existing menu item request.<br><br>See Submitting Menu Items. |

## Submitting Menu Items

Use the Submit Menu Items page to search for menu item requests to review, delete, or edit

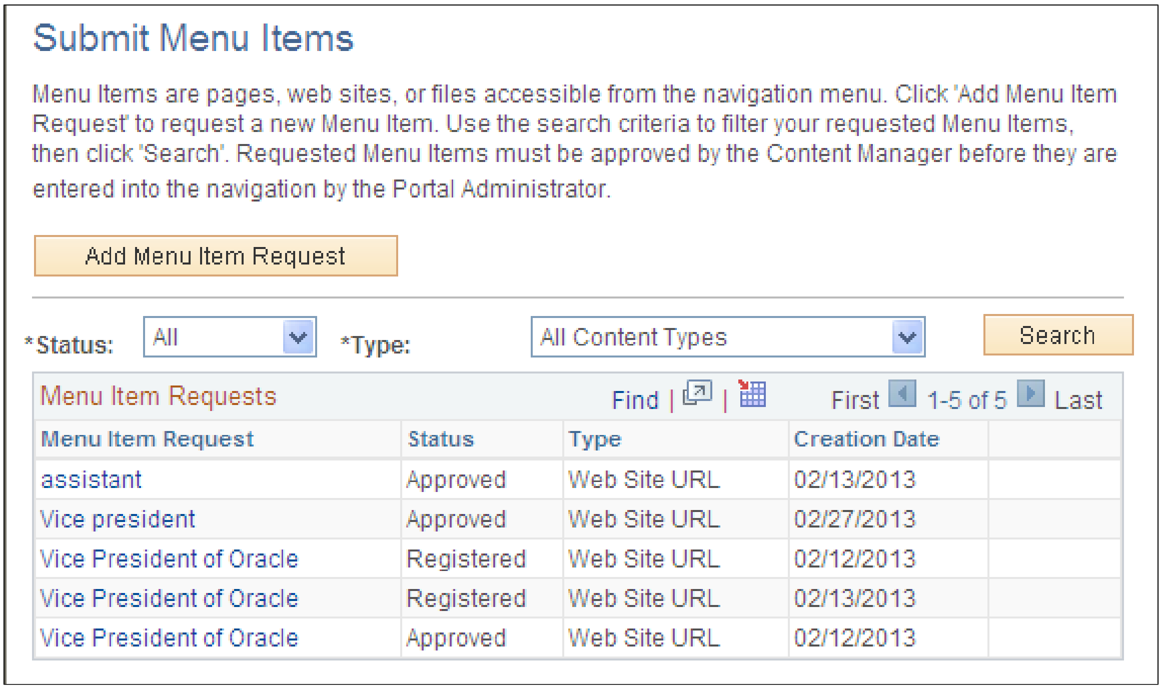
 

**Navigation**

My Content, Submit Menu Items

**Image: Submit Menu Items page**

This example illustrates the fields and controls on the Submit Menu Items page. You can find definitions for the fields and controls later on this page.




| | |
|---|---|
| **Add Menu Item Request** | Click to access the Edit Menu Item Request page, where you can add a new menu item request. |
| **Search** | Click to execute a menu item request search using criteria you have specified in the Status and Content Type fields. The Submit Menu Item page lists menu item requests that meet your search criteria. |
| **Menu Item Request** | Click for a menu item request in *Draft*, *Submitted*, or *Rework* status to access the Edit Menu Item Request page, where you can edit all fields of the menu item request.<br><br>Click for a menu item request in *Rejected*, *Approved*, or *Registered* status to access the View Menu Item Request page, where you can view all fields of the menu item request. |
| **Delete** | Click to delete the associated menu item request. You will be prompted to confirm your deletion.<br><br>The Delete button displays only for menu item requests with a status of *Draft*, *Rejected*, *Rework*, or *Submitted*. |

# Submitting or Editing Menu Item Requests

This topic discusses submitting and editing menu item requests.

## Pages Used to Submit or Edit Menu Item Requests

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| Edit Menu Item Request Page | EPPMI_ITM_EDIT | Submit or edit menu item requests |

## Edit Menu Item Request Page

Use the Edit Menu Item Request page (EPPMI_ITM_EDIT) to submit or edit menu item requests.

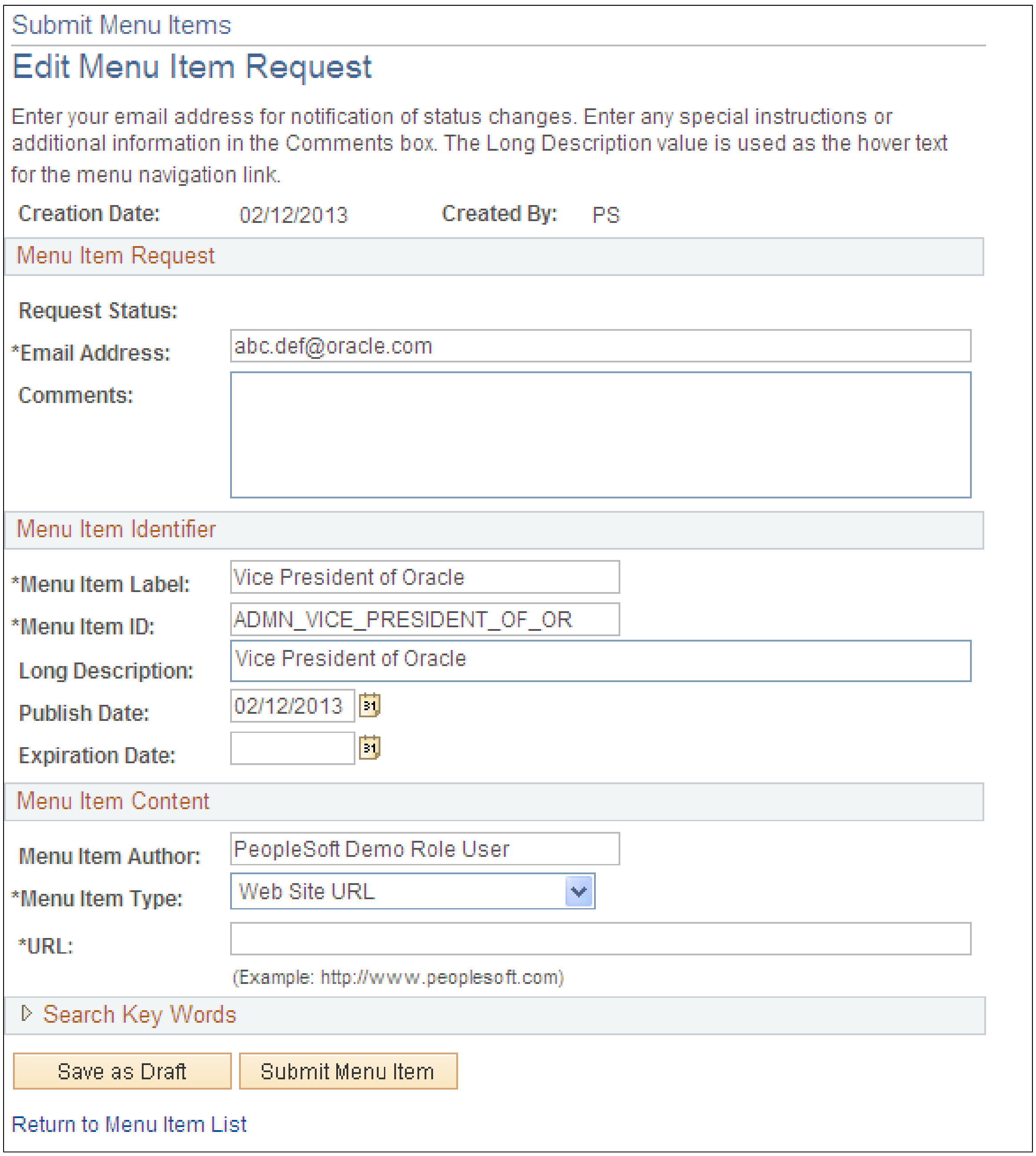
 

**Navigation**

1. My Content, Submit Menu Items.
2. Click the Add Menu Item Request button.

**Image: Edit Menu Item Request page**

This example illustrates the fields and controls on the Edit Menu Item Request page. You can find definitions for the fields and controls later on this page.



## Menu Item Request

| | |
|---|---|
| **Request Status** | Displays the current status of this request. If this is a new request, the field is clear. |
| **Email Address** | If available, the email address will default from the user profile, but can be overridden. Status change notifications will be sent to this address. |
| **Comments** | Enter special instructions or additional information. |

## Menu Item Identifier

| | |
|---|---|
| **Menu Item Label** | Enter the link text that will appear for the menu item in the portal menu. |
| **Menu Item ID** | Defaults from the menu item label, but can be changed. Special characters are removed, spaces are replaced with underscores, the defined prefix is added, and text is changed to uppercase. For example, *My Submitted Item* is stored as *ADMN_MY_SUBMITTED_ITEM*, where ADMN is the prefix as defined on the Installation Options page.<br><br>See "Defining Installation Options" (PeopleSoft Interaction Hub 9.1: Portal and Site Administration). |
| **Long Description** | Enter text that you want to appear as hover text for the menu item link. |
| **Publish Date** | Select the date on which you want to publish the menu item. Defaults to today's date. |
| **Expiration Date** | Select the date on which you want to discontinue the menu item. Leave this field clear if there is no expiration date for the menu item. |

## Menu Item Content

| | |
|---|---|
| **Menu Item Author** | This value initially defaults from information available in the user profile, but can be edited. |
| **Menu Item Type** | Select the content type for the menu item. Available values include:<br><br>*File Attachment.*<br><br>*Managed Content.*<br><br>*PeopleSoft URL.*<br><br>*Web Site URL.* |

**Note:** Remaining fields discussed in this section are based on the content type selected.

**Add Attachment**

Click to access a page where you can browse for the file for which you want to submit a menu item request.

This button displays when the Content Type field is set to *File Attachment.*

**File Name**

The name of the selected file attachment displays as a link to the contents of the file.

This field displays when the Content Type field is set to *File Attachment.*

**Delete Attachment**

Click to delete the file attachment from the menu item request. This field displays when a file attachment has been added to a menu item request.

**Date Added**

Displays the date and time at which the file attachment was added to the menu item request.

This field displays when a file attachment has been added to a menu item request.

**Select Content**

Click to access the Select Managed Content page, where you can access a list of content that is available for selection.

Only approved content that is in a publishable category and for which you have viewer privileges is listed. Click the Content Title link to select the content and return to the Edit Menu Item Request page.

See "Importing Managed Content into Other Features" (PeopleSoft Interaction Hub 9.1: Content Management System).

This field displays when the Content Type field is set to *Managed Content.*

**Content Title**

The name of the selected content displays as a link to the content.

This field displays when the Content Type field is set to *Managed Content.*

**Re-Select Content**

Click to access the Select Managed Content page, where you can select different managed content for your menu item request.

This field displays when managed content has been added to a menu item request.

**Content Type**

Displays the content type. *File Attachment*, *Text*, or *HTML*, for example.

This field displays when managed content has been added to a menu item request.

**Content ID**

Displays the identifier of the content.

This field displays when managed content has been added to a menu item request.

**Market**

Select the market for the PeopleSoft URL.

This field displays when the Content Type field is set to *PeopleSoft URL.*

**Menu Name**

Enter a valid menu name for the PeopleSoft URL.

This field displays when the Content Type field is set to *PeopleSoft URL.*

**Component Name**

Enter a valid component name for the PeopleSoft URL.

This field displays when the Content Type field is set to *PeopleSoft URL.*

**Parameters**

Enter any existing parameters for the PeopleSoft URL. For example: *?P1=value1&P2=value2&P3=value3*.

This field displays when the Content Type field is set to *PeopleSoft URL.*

**URL**

Enter the website URL for your menu item request. For example: *http://www.peoplesoft.com*.

This field displays when the Content Type field is set to *Web Site URL.*

## Search Key Words

Use the Search Key Words group box to enter up to three key words. Entering a keyword creates an attribute on a registered menu item with a KEYWORD parameter that contains the keyword value you enter.

**Save as Draft**

Click to save your request in draft mode. Use this option when you want to save the menu item request, but are not ready to submit it for review and approval.

---

**Note:** No email notifications are triggered for requests with a status of *Draft.*

---

**Submit Menu Item**

Click to submit your menu item request for review and approval.

This action triggers an email notification to the submitter with a link to the Submit Menu Item page. The submitted status is defaulted from the email.

This action also triggers an email notification to the designated navigation manager with a link to the Manage Menu Item Requests page. The email URL sets the filter to display only submitted items.

If you also have permissions to approve menu item requests or if you have permissions to approve and register these requests, an additional button will be displayed after you submit the menu item request to facilitate administration of your request. Depending on your permissions, one of the following or no additional button will be displayed:

- Approve – If you have permissions to approve menu item requests, click the Approve button to approve your request. See "Manage Menu Item Requests Page" (PeopleSoft Interaction Hub 9.1: Portal and Site Administration) for additional information on managing menu item requests.

- Approve & Register– If you have permissions to both approve and register menu item requests, click the Approve & Register button to approve the menu item and begin the process to register the menu item. See "Define Menu Item Registry Page" (PeopleSoft Interaction Hub 9.1: Portal and Site Administration) to continue the process to register the menu item.

### Related Links

"Setting Up Menu Item Request Email Notifications" (PeopleSoft Interaction Hub 9.1: Portal and Site Administration)

"Approving and Registering the Menu Item Requests" (PeopleSoft Interaction Hub 9.1: Portal and Site Administration)

## Chapter 16

# Submitting Searches in the Portal

## Understanding Searching in the Portal

You perform searches of PeopleSoft Interaction Hub content by specifying a search string and a search group in the Global Search bar in the portal header. Once you have viewed results, you can refine your original search or specify entirely different search criteria and search group.

In addition to searches from the Global Search bar in the portal header, you can perform searches directly from within specific features using the Search link.

---

**Important!** PeopleSoft Interaction Hub content is not dynamically indexed. The search results are only as current as the last time the search indexing process (or processes) ran. It is the responsibility of the portal administrator to ensure that search indexing is performed on a regular schedule.

---

See "Building Search Indexes" (PeopleSoft Interaction Hub 9.1: Portal and Site Administration)

See the product documentation for *PeopleTools: Search Technology*, “Administering PeopleSoft Search Framework,” Working with Search Indexes.

### Global Search

In PeopleTools 8.52, the *PeopleSoft Search Framework* was introduced. This search framework consists of PeopleSoft components (pages and records provided by PeopleTools), which provide a centralized interface for configuring PeopleSoft integration with a back-end search engine, creating search artifacts like search definitions, search categories, and building and maintaining search indexes. Oracle Secure Enterprise Search (SES) is the back-end search engine on which the PeopleSoft Search Framework relies.

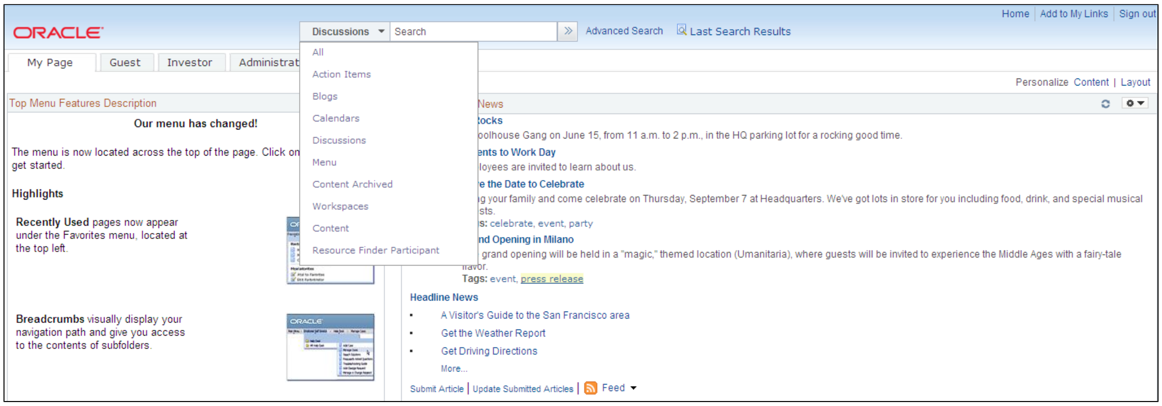
Along with the search framework, PeopleTools 8.52 also introduced Global Search, which provides a way for a user to search across all or a specific group of search indexes. Global Search is available in the portal header throughout the user's session irrespective of the content the user is accessing in the target frame. It allows the user to search and drill down to a specific row and transaction from the search results without navigating to the classic component search page. In a PeopleSoft Interaction Hub environment, Global Search can be configured to search across indexes from multiple content provider systems.

The remainder of this topic provides information on submitting searches using Global Search.

In the following example, Global Search has been configured for a PeopleSoft Interaction Hub system. In this example, the Discussions search group is selected in the Global Search:

**Image: Global Search in the portal header**

This example illustrates Global Search in the portal header.




Use Global Search to perform a search on all content in the portal for the selected search group.

In the portal header, select the search group, enter the search string in the Search field, and press Enter.

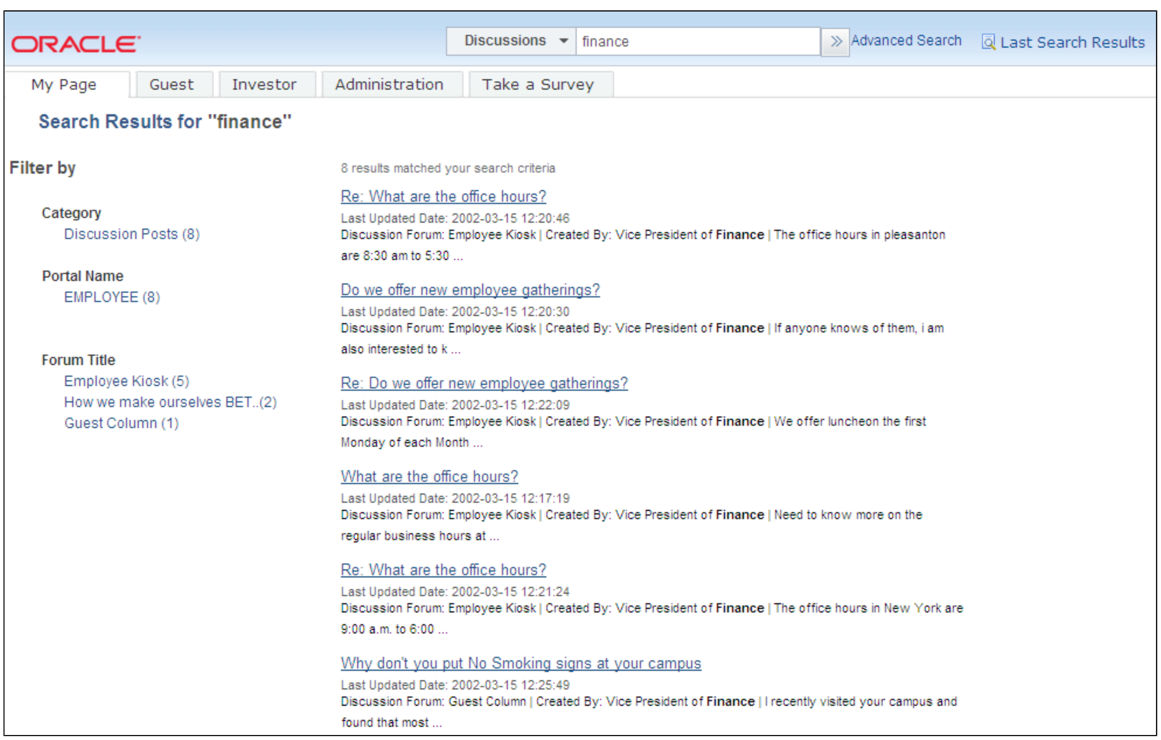
---

**Note:** Do not use blank or * (asterisk); these are not valid search criteria.

---

**Image: Global Search results page**

This example illustrates the Global Search results page. You can find definitions for the fields and controls later on this page.




Use the Global Search results page to review the search results and to drill down to any specific transaction or to filter the search results using the facets feature.

| | |
|---|---|
| **Filter by** | This is the facet pane, which is the area to the left of the search results. Using the facets defined for the current search definition, you can filter the search results and drill down closer to the desired information.<br><br>If searching the All category, you initially see the various search categories represented in the search results.<br><br>By drilling into the category, you view the facets associated with attributes in the search index. |
| **Title** | The title, which is the clickable link, enables the user to identify the search result and navigate to the associated component. |
| **Summary** | Displays a general overview of the target data. |

See "Understanding Search in PeopleSoft Interaction Hub" (PeopleSoft Interaction Hub 9.1: Portal and Site Administration).

## Searching Within Specific Features

In addition, many features in PeopleSoft Interaction Hub provide a Search link that allows you to search for content within the scope of that feature. You can search within each of the following:

- Action item lists

  Search Action Items Page

- Blogs

  See Performing Searches Within Blogs.

- Calendars

  See Search Community Calendars Page .

- Content management folders

  See "Searching for Folders and Content" (PeopleSoft Interaction Hub 9.1: Content Management System).

- Discussion forums

  See Performing Searches Within Discussion Forums.

- Resource Finder

  See "Performing Advanced Resource Finder Searches" (PeopleSoft Interaction Hub 9.1: Resource Finder).

- Tags

  See Search Tags Page.

- Workspaces

"Searching Within Workspaces" (PeopleSoft Interaction Hub 9.1: Collaborative Workspaces).

# Reviewing Tags From Search Results Page

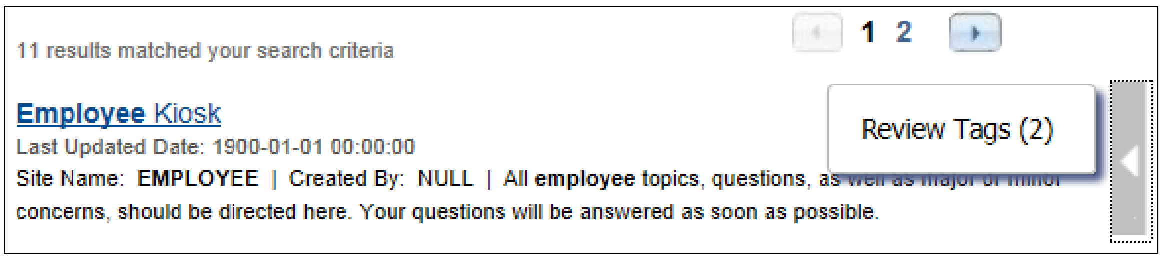
Tagging helps to categorize content so that if required you can filter or search specific content using the tags.

See Understanding Tagging in PeopleSoft Interaction Hub

The Global Search result page displays the results with Get Related Actions panel adjacent to each result. Click the indicator to display the panel with the Review Tags related action. The number of new tags is displayed in parenthesis.

**Image: Review Tags in Get Related Actions panel**

The example displays Review Tags related action in the Get Related Actions panel for a search result.




Click on the Review Tag (number of new tags) related action link to open the View Tags modal window. Click on Edit button on the View Tags window to update tags or click on tag links to search for items with same tag name.

## Related Links

Performing Searches for Tags

Creating and Managing Tags

## Chapter 17

# Working With Context Manager in PeopleSoft Interaction Hub

## Understanding Context Manager

**Important!** As of PeopleSoft Interaction Hub 9.1 Revision 2 and PeopleTools 8.53, the Context Manager feature and associated pagelets have been deprecated. The PeopleSoft Related Content Framework provides a broader and more flexible framework for contextually related content.

To the users, 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. Therefore, Context Manager can be considered to be the framework within which features—such as, related information, related contacts, related resources, related discussions, related workspaces, related links, and content ratings—operate.

**Note:** Defined security rules are maintained such that items to which a user does not have access will not appear.

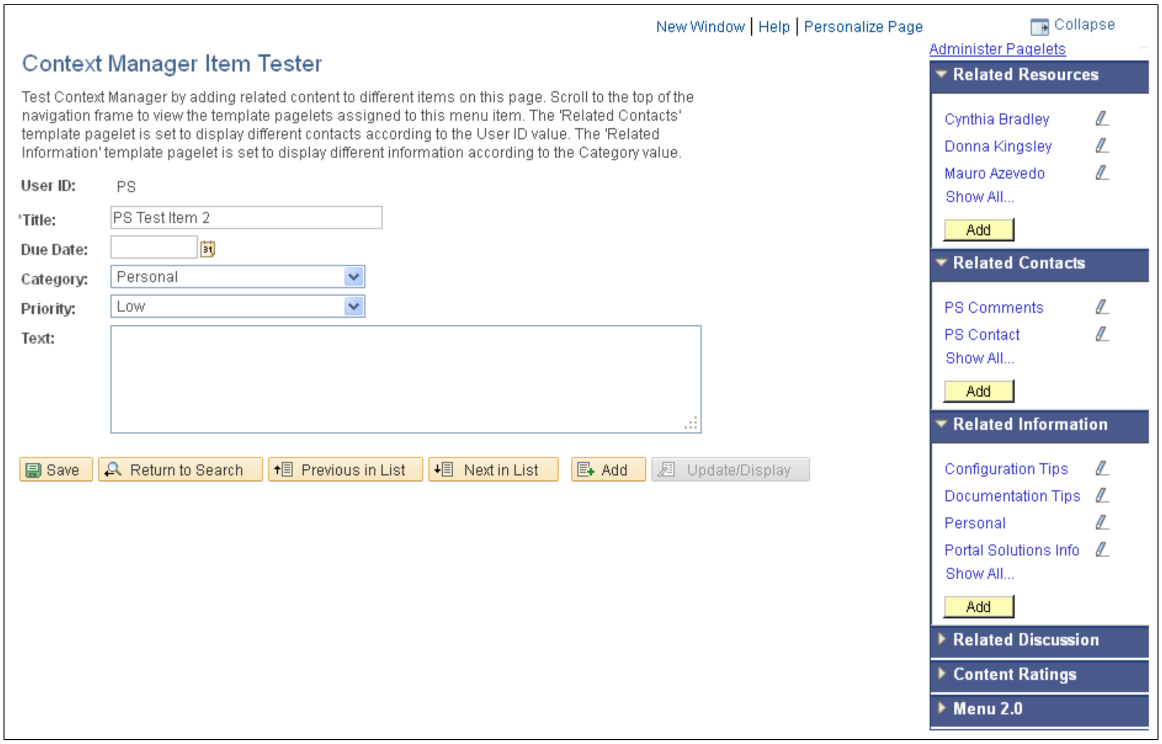
Context Manager is just one method that PeopleSoft Interaction Hub delivers for providing contextually relevant information to your users. PeopleSoft Interaction Hub also provides a general purpose solution that can be deployed to any of your PeopleSoft application pages. PeopleSoft Interaction Hub related content services provide PeopleSoft Interaction Hub features on PeopleSoft application pages.

See Delivered Related Content Services

The following example shows the Context Manager frame on the right side of the sample Context Manager Item Tester page with portions of four pagelets that have been assigned to the page. Two pagelets—Related Resources and Related Information—display items that have been identified by the topic experts to be related to the page:

**Image: Context Manager Item Tester page**

This example illustrates the fields and controls on the Example Context Manager Item Tester page.

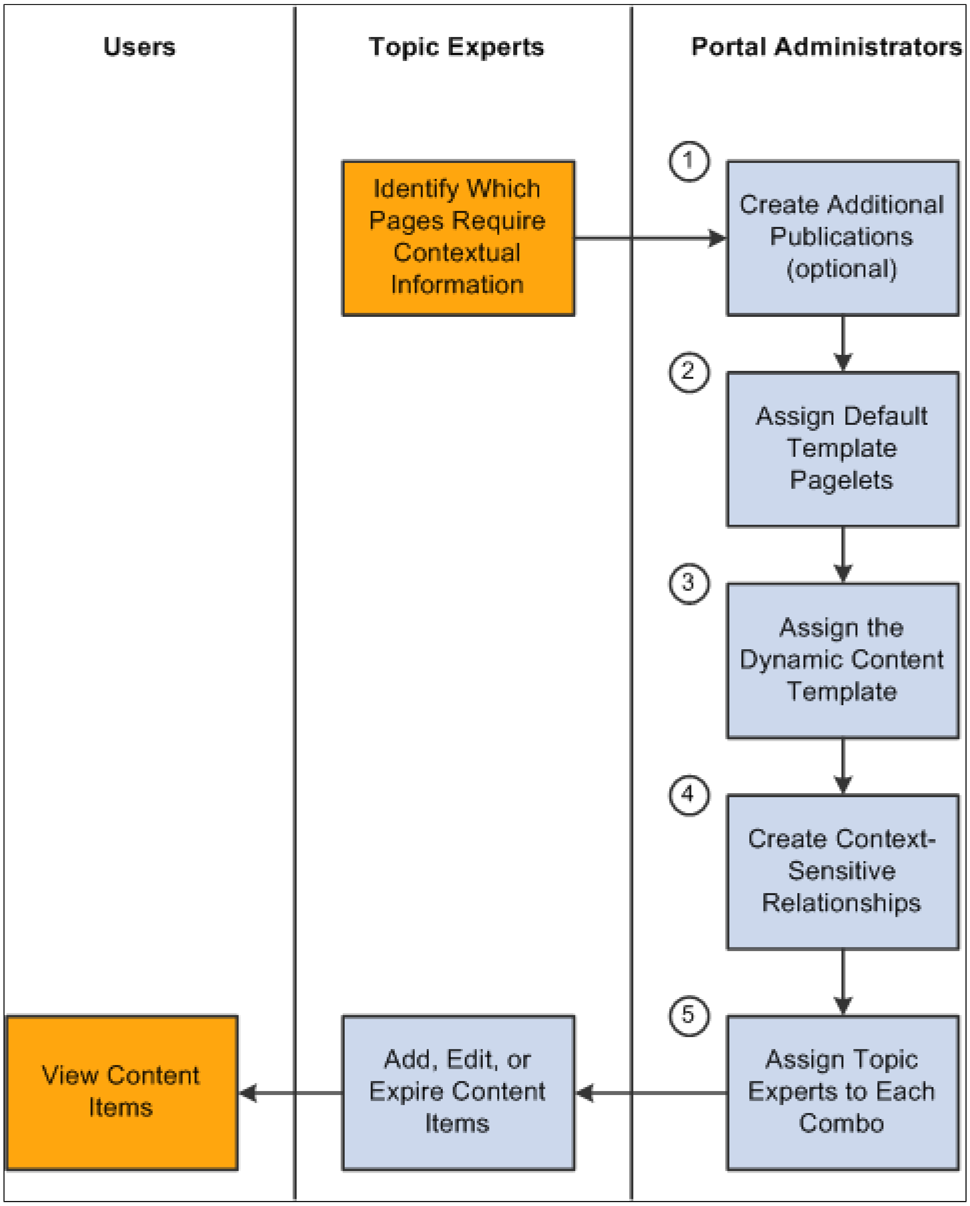


## Understanding Context Manager Setup

**Image: Setting up Context Manager**

The following image is an example of Setting up Context Manager. Setting up Context Manager so that content can be delivered to users requires the collaboration of portal administrators and designated topic experts as shown in the following diagram:




The diagram shows that after the topic experts have identified which pages or transactions require contextual information, the portal administrator must complete five tasks:

1. Create additional template pagelet publications (optional).

2. Assign default template pagelets for the dynamic content template.

3. Assign the dynamic content template to menu items.

4. Create context-sensitive relationships between template pagelets and menu items .

5. Assign topic experts to each combination of menu item and template pagelet publication.

After the portal administrator has completed these tasks, the topic experts can add, edit, expire, or delete content items for each combination of menu item and template pagelet publication.

The sections in this topic provide the details for each of these set up tasks.

# Creating Additional Template Pagelet Publications

This topic provides an overview of creating additional template pagelets, a list of common elements used in this section, and discusses how to create a template pagelet publication.

## Pages Used to Create Additional Template Pagelet Publications

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| Related Information Publication | EPPRC_PUB | Define Related Information pagelet publications and save them to the portal registry.<br><br>See Creating a Template Pagelet Publication. |
| Related Contacts Publication | EPPRC_PUB | Define Related Contacts pagelet publications and save them to the portal registry.<br><br>See Creating a Template Pagelet Publication. |
| Related Resources Publication | EPPRC_PUB | Define Related Resources pagelet publications and save them to the portal registry.<br><br>See Creating a Template Pagelet Publication. |

## Understanding Creation of Additional Template Pagelet Publications Page

A “template pagelet publication” is an instance of a template pagelet. For example, Internal Contacts and External Contacts could be two publications of the Related Contacts template pagelet. Each publication is displayed as a separate pagelet using the label that is defined for the publication.

PeopleSoft Interaction Hub is delivered with one publication for each template pagelet. Therefore, this task is optional if you require the delivered template pagelets only. The portal administrator can define multiple publications for related contacts, related information, and related resources, but not for related discussions and related workspaces.

## Creating a Template Pagelet Publication

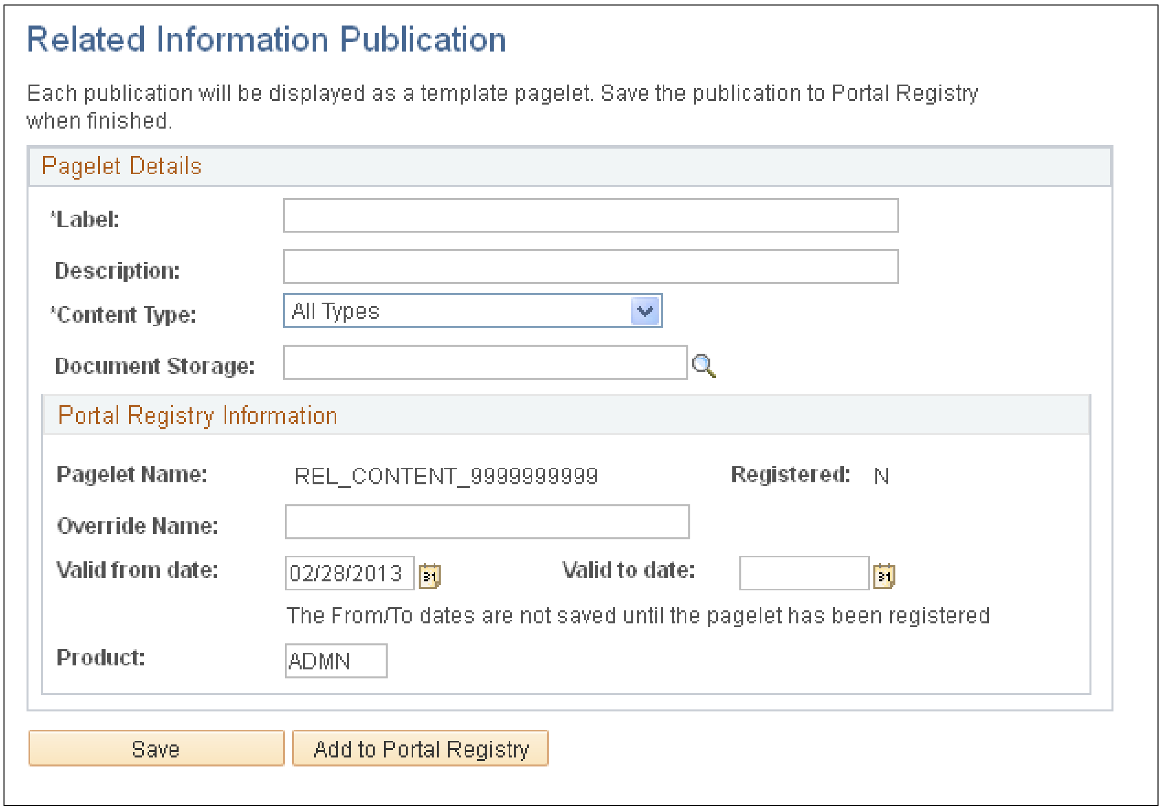
Access one of the following pages:

- Related Contacts Publication page (Portal Administration, Context, Related Contacts, Define Publications).
- Related Information Publication page (Portal Administration, Context, Related Information, Define Publications).
- Related Resources Publication page (Portal Administration, Context, Related Information, Define Publications).

**Image: Related Information Publication page**

This example illustrates the fields and controls on the Related Information Publication Page. You can find definitions for the fields and controls later on this page.




The Related Contacts Publication page, Related Information Publication page, and Related Resources Publication page all display similar page elements.

| | |
|---|---|
| **Label** | Enter the name of the pagelet. This name will be used in the portal menu as the menu item for this publication—for example, Related Managed Content. |
| **Description** | Enter a description for the publication. |
| **Enable Instant Messaging** | Select to enable instant messaging functionality from the Related Contacts publication.<br><br>See "Understanding Instant Messaging in PeopleSoft Interaction Hub" (PeopleSoft Interaction Hub 9.1: Portal and Site Administration) |

**Content Type**

For a Related Information publication, select the type of content you want to be available as related information on the publication. If you select a value other than *All Types*, topic experts can only assign that type of content to the publication. Available values are:

- *All Types.* Content can be of any type.
- *External Website.* Content originating from an external website.
- *File Attachment.* Content is contained in a file.
- *Managed Content.* Content is managed by the Content Management system in PeopleSoft Interaction Hub.
- *Menu Item.* Content is registered in the portal registry.

**Document Storage**

For a Related Information publication, select the storage location for content items. Delivered values include:

- *RCDOCDB.* Database.
- *RCDOCFS.* File server.

**Pagelet Name**

Displays a default name for the pagelet. This name is originally generated automatically.

**Registered**

Displays either *Y* or *N* to indicate whether the pagelet has been registered.

**Override Name**

Enter a new pagelet name.

**Note:** Once the publication has been registered in the portal registry, the pagelet name cannot be changed.

**Valid from date**

Select the date on which you want the publication to become active. Defaults to today's date.

**Valid to date**

Select the date on which you want the publication to become inactive. Clear this field to keep the publication active indefinitely.

**Product**

Indicates which product is associated with this publication. The default value for this field is *ADMN* when a new publication is created, but it can be overridden by an administrator.

**Save**

Click to save your changes.

**Note:** Saving does not make the publication available. You must add new publications to the portal registry, or update the portal registry with changes made to existing publications.

| | |
|---|---|
| **Add to Portal Registry or Update Portal Registry** | Click to add the publication to the portal registry. If you are making changes to an existing publication, the Update Portal Registry button displays instead. |

# Assigning Default Template Pagelets for the Dynamic Content Template

This section discusses how to assign default template pagelets to display for all menu items that use the dynamic content template (PTCXM_DYNAMIC_CON_TEMPLATE).

Use the Default Template Pagelets page (PTCXM_DEFAULT) to assign default template pagelets that will display for all content references that have been assigned the dynamic content template (PTCXM_DYNAMIC_CON_TEMPLATE).

**Navigation**

Portal Administration. Context, Context Manager, Default Template Pagelets

## Page Used to Assign Default Template Pagelets for the Dynamic Content Template

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| Default Template Pagelets Page | PTCXM_DEFAULT | Assign default template pagelets that will display for all content references that have been assigned the dynamic content template (PTCXM_DYNAMIC_CON_TEMPLATE). |

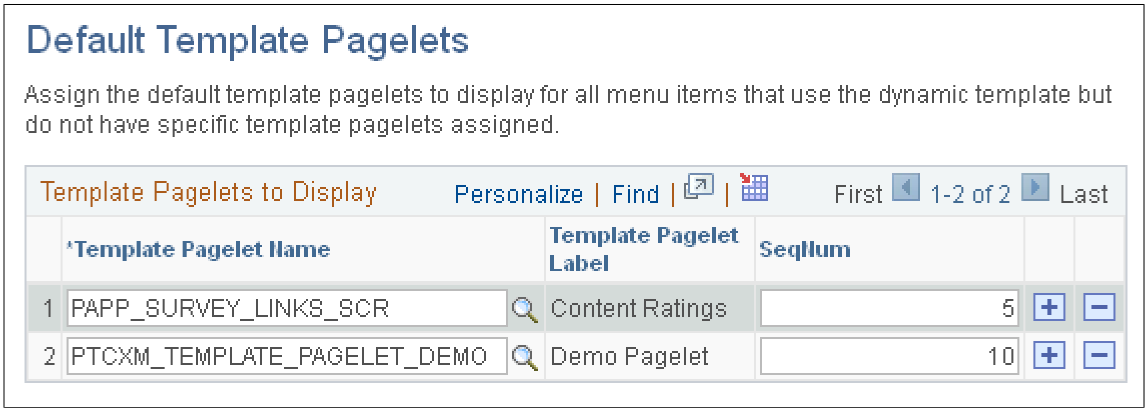
 

## Default Template Pagelets Page

Access the Default Template Pagelets Page (Portal Administration. Context, Context Manager, Default Template Pagelets).

**Image: Assigning Default Template Pagelets page**

This example illustrates the fields and controls on the Assigning Default Template Pagelets page. You can find definitions for the fields and controls later on this page.




**Template Pagelet Name**

Select the pagelet or pagelets that you want to appear as default pagelets on pages that use the dynamic content template. The label of each selected template pagelet displays.

---

**Note:** For each page (menu item) that uses the dynamic content template, additional template pagelets can be added and the default pagelets can be removed.

---

See Assign Template Pagelets Page.

**SeqNum**

Enter the order in which you want the template pagelets to appear in the Context Manager frame.

## Assigning the Dynamic Content Template to Menu Items

These topics discuss how to the dynamic content template to menu items. In this topic, *menu item, page,* and *content reference* are all synonymous terms.

In order for a page to display Context Manager template pagelets, the content reference must be use the dynamic content template (PTCXM_DYNAMIC_CON_TEMPLATE). This template displays the template pagelets in the Context Manager frame on the right side of the page.

Use the Structure and Content page (PORTAL_OBJ_LIST) to navigate the structure of the portal registry items to manage folders and perform content reference administration.

**Navigation**

- Portal Administration, Navigation, Structure and Content
- PeopleTools, Portal, Structure and Content

Use the Content Ref Administration page (PORTAL_CREF_ADM) to maintain attributes of the content reference—in this instance, assign the dynamic content template (PTCXM_DYNAMIC_CON_TEMPLATE).

**Navigation**

Navigate through the structure of the portal registry and click a content reference to be modified.

## Pages Used to Assign the Dynamic Content Template to Menu Items

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
| --- | --- | --- |
| Structure and Content | PORTAL_OBJ_LIST | Navigate the structure of the portal registry items to manage folders and perform content reference administration.<br><br>See Assigning the Dynamic Content Template Page. |
| Content Ref Administration | PORTAL_CREF_ADM | Maintain attributes of the content reference—in this instance, assign the dynamic content template (PTCXM_DYNAMIC_CON_TEMPLATE).<br><br>See Assigning the Dynamic Content Template Page. |

## Assigning the Dynamic Content Template Page

To assign the dynamic content template to menu items:

1. Select Portal Administration, Navigation, Structure and Content.

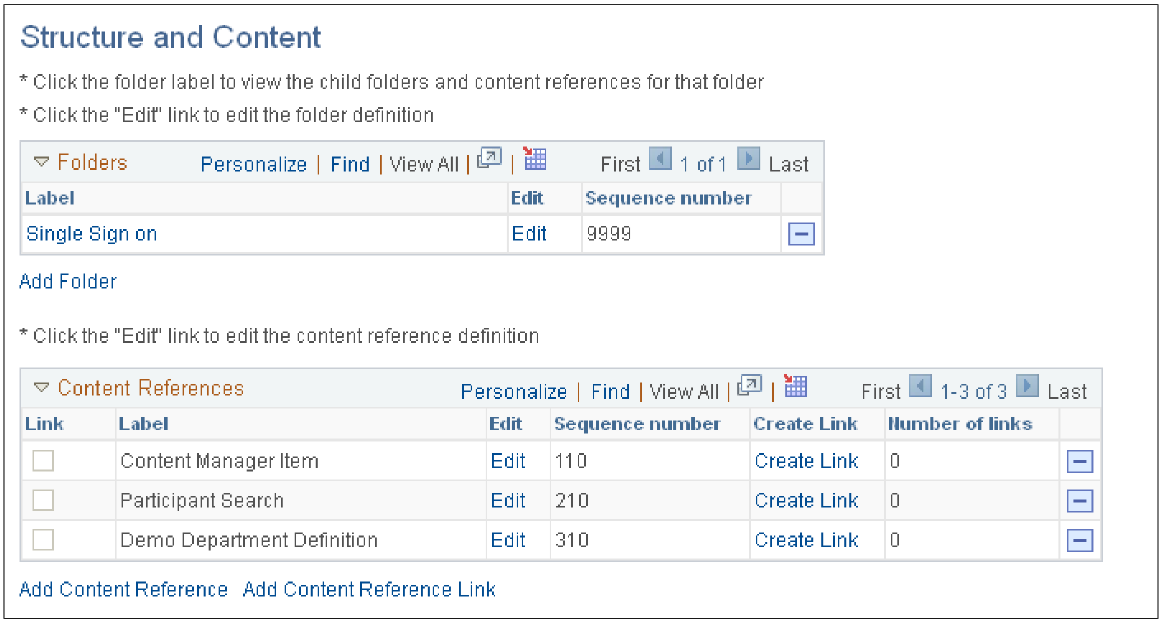
   The Structure and Content page is displayed.

2. Navigate through the portal registry folders to the folder containing the content reference to which you want to add the dynamic content template.

In the following example, the sample Context Manager Item page resides in the Portal Administration -> Test folder.

**Image: Structure and Content page**

This example illustrates the fields and controls on the Structure and Content page.



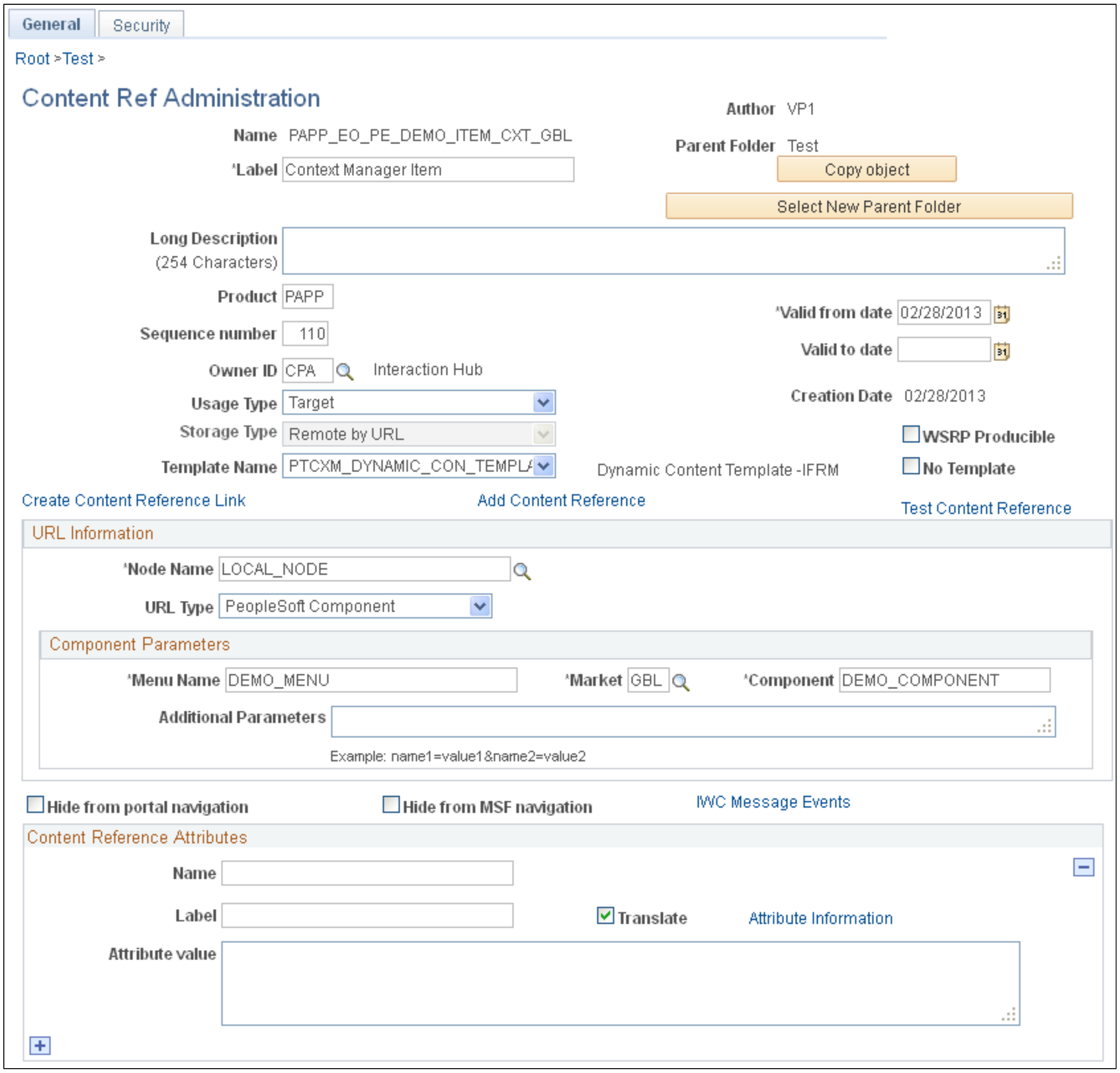

3. Click the Edit link to edit the content reference definition. The Content Ref Administration page is displayed.

In this example, Content Ref Administration page is displayed for the sample Context Manger Item page:

**Image: Content Ref Administration page (for the sample Context Manger Item page)**

This example illustrates the fields and controls on the Content Ref Administration page (for the sample Context Manger Item page).




4. In the Template Name field, select the *PTCXM_DYNAMIC_CON_TEMPLATE* value.

5. Click Save.

---

**Note:** This assignment is site-specific. If the same content reference (CREF) appears in multiple sites, you must perform the assignment for each instance.

---

See the product documentation for *PeopleTools: Portal Technology*

# Creating Context-Sensitive Relationships Between Template Pagelets and Menu Items

This topic discusses assigning additional template pagelets to menu items, defining minimization options and key fields for context sensitivity and how to auto-populate key fields for context sensitivity.

**Note:** In this topic, *menu item, page,* and *content reference* are all synonymous terms and are used interchangeably.

## Pages Used to Create Context-Sensitive Relationships

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| Assign Template Pagelets Page | PTCXM_DISPLAY | Assign template pagelets to menu items. |
| Template Pagelet Options Page | PTCXM_DISPLAY_SECB | Assign minimization options and key field context sensitivity for the menu item–template pagelet combination. |

## Assign Template Pagelets Page

Use the Assign Template Pagelets page (PTCXM_DISPLAY) to assign template pagelets to menu items.

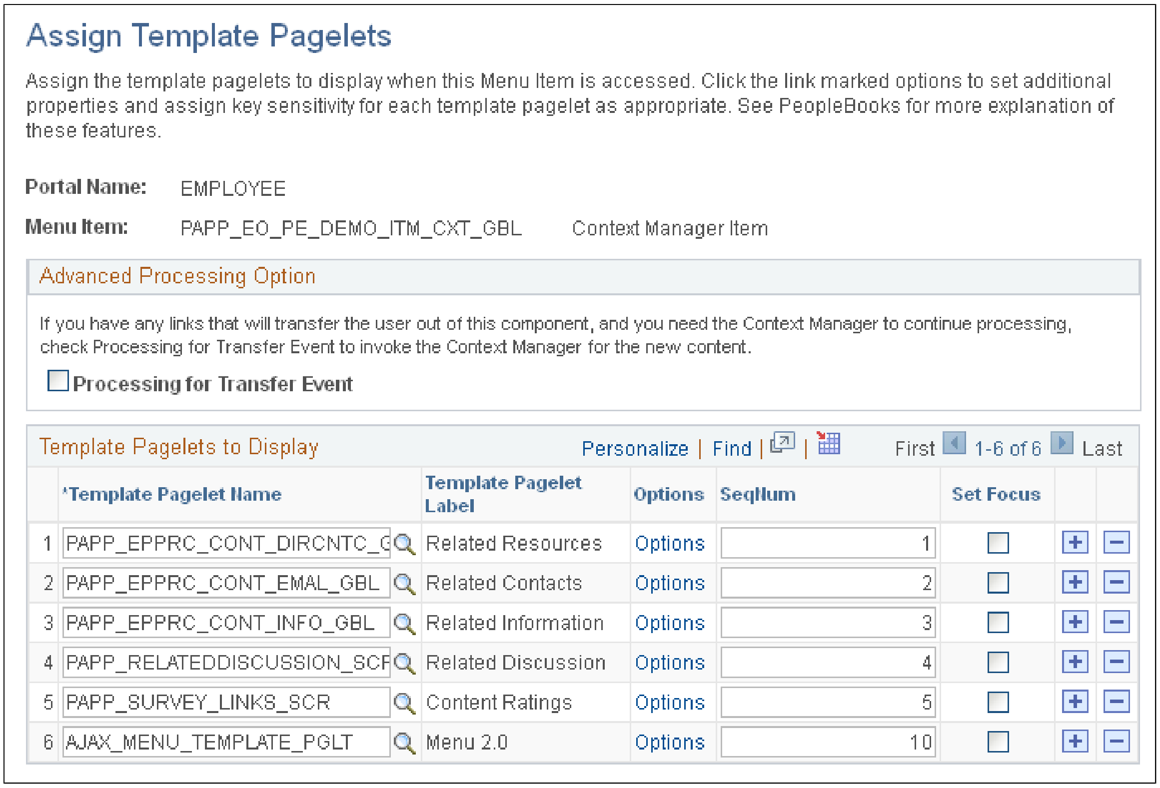
 

### Navigation

- Portal Administration, Context, Context Manager, Assign Template Pagelets
- Navigate to the page to which you have assigned the dynamic content template. Click the Administer Pagelets link that displays at the top of the Context Manager frame.

### Image: Assign Template Pagelets page

This example illustrates the fields and controls on the Assign Template Pagelets page. You can find definitions for the fields and controls later on this page.




Use the Assign Template Pagelets page to assign additional template pagelets to this menu item. On this page, you can review, modify, and delete the default template pagelets assigned through the template as well as assign additional pagelets.

See Default Template Pagelets Page.

**Portal Name** Defaults to the portal or site that you are signed into.

**Menu Item** Displays the portal object (content reference) name and label for the selected menu item.

**Note:** The example displayed shows the sample Context Manager Item page delivered with PeopleSoft Interaction Hub.

**Processing for Transfer Event** Select if any links that are displayed on the template pagelet will transfer the user out of the selected menu item component, but you need PeopleTools Context Manager to continue processing for the newly accessed content.

For example, let's say that you have assigned the Assign Themes page to use the Related Information pagelet and the Assemble Themes page to use the Related Contact pagelet. Then you access the Assign Themes page from the menu and the Related Information pagelet displays in the Context Manager frame. When you click the Details link for the theme, the Assemble Themes page displays. If this option is selected, the system will look for the pagelets that are assigned to the new content (Assemble Themes page) and display the Related Contacts pagelet in the Context Manager frame. If this option is not selected, the Context Manager frame will remain unchanged and continue to display the Related Information pagelet.

**Template Pagelet Name**

Select the template pagelet you want to associate with the current menu item.

**Note:** When you initially view this page for a specific menu items, the default template pagelets assigned to the template are displayed.

**Options**

Click to access the Template Pagelet Options page on which you can specify minimization options and key field context sensitivity.

**SeqNum (sequence number)**

Enter the order in which you want the template pagelets to display in the Context Manager frame.

**Set Focus**

Select to bring context sensitive pagelet into view when you access the target content.

**Note:** Only one template pagelet in the list can have focus. If you select Set Focus for a second template pagelet, the system clears any previous selection.

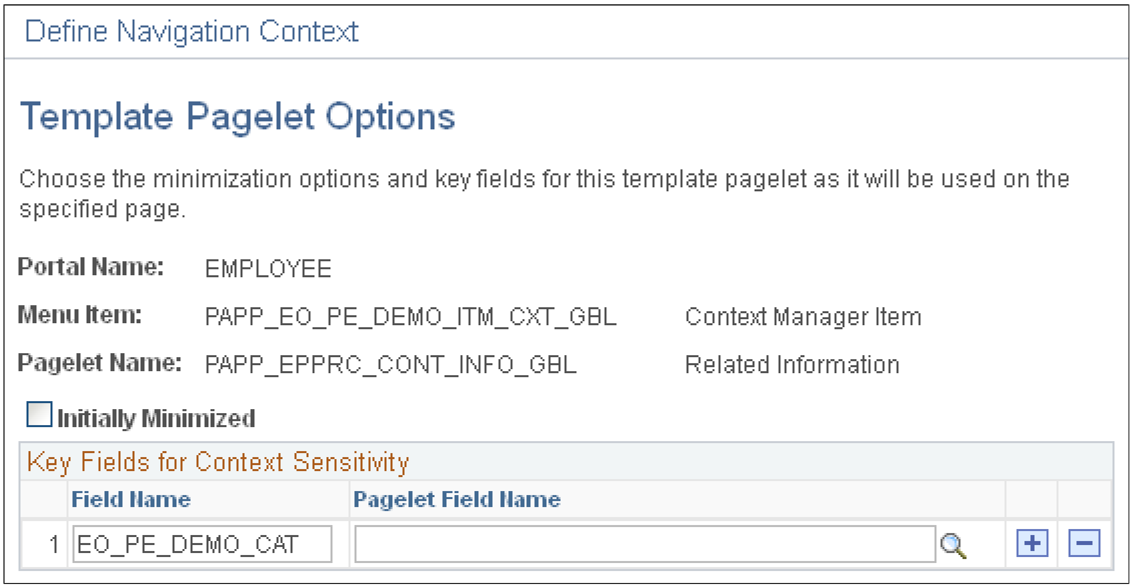
 

## Template Pagelet Options Page

Access the Template Pagelet Options Page (Click the Options link on the Assign Template Pagelets page).

**Image: Template Pagelet Options page**

This example illustrates the fields and controls on the Template Pagelet Options page. You can find definitions for the fields and controls later on this page.




**Initially Minimized**

Select if you want the pagelet to appear as minimized in the Context Manager frame the first time the associated menu item is accessed.

**Note:** If you maximize a pagelet, any time you access the target page during the session, the pagelet remains maximized. If you sign out or close the session, the pagelet appears minimized the next time you access the target page.

### Key Fields for Context Sensitivity

The values in the key fields are used to correlate context between the content reference and the template pagelet. If you did not access the Assign Template page using Administer Pagelets link on the target page, you must manually enter the primary key field names for the menu item.

**Field Name**

Enter the target page key field name whose value is passed to the template pagelet to establish context sensitivity.

**Pagelet Field Name**

Use this field to map PeopleSoft field names to field names used by template pagelets based on OBIEE reports.

### Additional Key Fields

The Additional Key Fields group box is displayed when this page is accessed using Administer Pagelets link on the target page. Enter additional secondary fields to be used to relate context from the menu item to the template pagelet.

---

**Note:** Template pagelets can use a maximum of three key fields.

---

## Template Pagelet Options Page (Auto – Populate Key Fields)

You use the Template Pagelet Options page to assign key field context sensitivity between content references and template pagelets. You can access this page through the Assign Template Pagelets page through the Portal Administration menu navigation (or through the Context Manager Center). Alternatively, to have the key field names that are used for context-sensitivity auto-populated, access the Template Pagelet Options page by using the following procedure.

To auto-populate the key fields when you access the Template Pagelet Options Page:

1. Navigate to the target page.
2. From the Search page, select any value.

   When you make a selection, the key values are loaded into PeopleTools Context Manager so that the primary key fields of the pagelet are in the PIA_KEYSTRUCT object. In addition, any secondary keys such as alternate search keys are loaded into the PS_KEYSTRUCT object.
3. Click the Administer Pagelets link that appears at the top of the Context Manager frame.

   ---

   **Note:** This link appears when you have assigned the dynamic content template to the menu item.

   ---

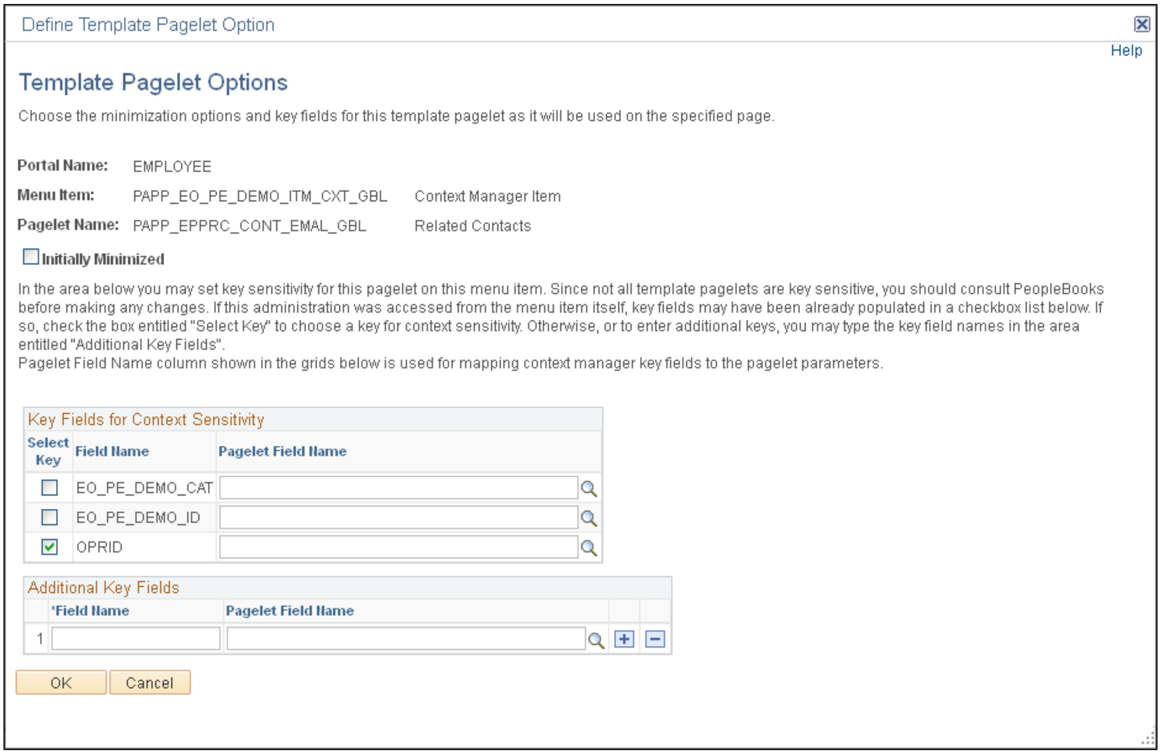
   The Assign Template Pagelets page appears.
4. Click the Options link for the template pagelet for which you want to assign key sensitivity.

The Template Pagelet Options page is displayed with the Key Fields for Context Sensitivity group box auto-populated with the primary key fields as shown in this example. In addition, the Additional Key Fields group box is auto-populated with any secondary keys such as alternate search keys:

**Image: Template Pagelet Options page (key fields auto-populated)**

This example illustrates the fields and controls on the Template Pagelet Options page (key fields auto-populated).




5. Select the Select Key check box to activate context-sensitivity for the associated key field.

---

**Note:** All search key fields are loaded into the buffer. Choose the appropriate fields to pass to the pagelet.

---

6. Click OK.

Additional information on use of the PIA_KEYSTRUCT and PS_KEYSTRUCT objects is presented in the topic.

### Related Links

Understanding Context Manager Setup

## Assigning Topic Experts

This section provides an overview of assigning topic experts and discusses how to assign topic experts (also known as content managers) to template pagelet publications.

## Pages Used to Assign Topic Experts

| *Page Name* | *Definition Name* | *Usage* |
|---|---|---|
| Related Information Topic Experts Page | EPPRC_USER | Assign topic experts to each menu item and Related Information template pagelet combination.<br><br>See Assigning Topic Experts to Page-Pagelet Combinations Page. |
| Related Contacts Topic Experts Page | EPPRC_USER | Assign topic experts to each menu item and Related Contacts template pagelet combination.<br><br>See Assigning Topic Experts to Page-Pagelet Combinations Page. |
| Related Resources Topic Experts Page | EPPRC_USER | Assign topic experts to each menu item and Related Resources template pagelet combination.<br><br>See Assigning Topic Experts to Page-Pagelet Combinations Page. |

## Understanding Topic Expert Assignments

Content displayed within a template pagelet is regulated and maintained according to the menu item. Topic experts are subject matter experts who are authorized to add, edit, or expire content for specific menu item–template pagelet combinations.

Topic experts enable the portal administrator to delegate the administration of Context Manager content to the person who is most knowledgeable about that topic. For example, the business process expert for the Human Resources Report Time Off transaction could be the topic expert for the Related Information publications that are assigned to the Report Time Off menu item.

If the expertise is shared among several people, different publications can be assigned different topic experts for a menu item. For example, if one person manages the external vendor relationships for a menu item and someone else manages the internal representatives, you could create two publications of the Related Contacts pagelet, each with its own topic experts.

Assign topic experts to all menu item and template pagelet combinations for Related Information, Related Contacts, and Related Resources.

## Assigning Topic Experts to Page-Pagelet Combinations Page

Access one of the following pages:

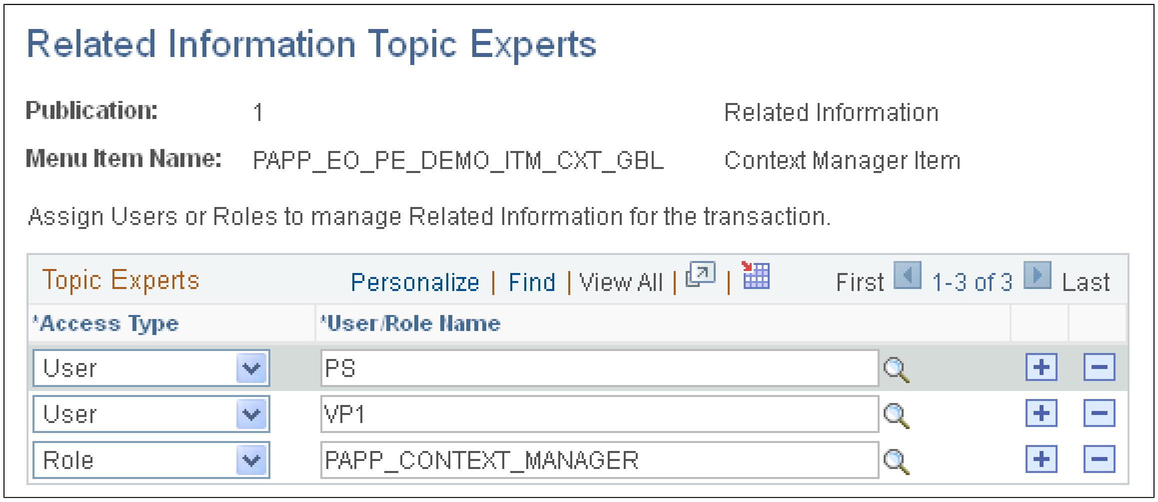
- Related Contacts Topic Experts page (Portal Administration, Context, Related Contacts, Define Topic Experts).
- Related Information Topic Experts page (Portal Administration, Context, Related Information, Define Topic Experts).

- Related Resources Topic Experts page (Portal Administration, Context, Related Information, Define Topic Experts).

**Image: Related Information Topic Experts page**

This example illustrates the fields and controls on the Related Information Topic Experts page. You can find definitions for the fields and controls later on this page.




The Related Contacts Topic Experts page, Related Information Topic Experts page, and Related Resources Topic Experts page all display the following page elements.

| | |
|---|---|
| **Publication and Menu Item Name** | Displays the template pagelet–menu item combination for which you are defining topic experts. |
| **Access Type** | Select *User* to be able to select the user ID of the topic expert in the User/Role Name field.<br><br>Select *Role* to be able to select the role of the topic expert in the User/Role Name field. |
| **User/Role Name** | Select the user ID or role name for the topic expert. |

# Viewing and Searching for Context Manager Data

This topic discusses viewing template pagelet and menu item combinations and searching for items assigned to menu items.

## Pages Used to View and Search for Context Manager Data

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| View Template Pagelets Page | EPPLN_INQUIRY | View current template pagelet and menu item combinations. |

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
| --- | --- | --- |
| View Related Information | EPPRC_INQUIRY | Search by topic expert, template pagelet publication, content, or menu item to see which pieces of content have been added to which menu item.<br><br>See Viewing Related Information . |
| View Related Resources | EPPRC_INQUIRY | Search by topic expert, template pagelet publication, resource, or menu item to see which resources have been added to which menu item.<br><br>See Viewing Related Information . |
| View Related Contacts | EPPRC_INQUIRY | Search by topic expert, template pagelet publication, contact, or menu item to see which contacts have been added to which menu item.<br><br>See Viewing Related Information . |
| View Related Contacts - Content Detail | EPPRC_INQUIRY_DTL | Access details about the contact and its associated menu item.<br><br>See Viewing Related Information Content Details |
| View Related Information - Content Detail | EPPRC_INQUIRY_DTL | Access details about the content and its associated menu item.<br><br>See Viewing Related Information Content Details |
| View Related Resources - Content Detail | EPPRC_INQUIRY_DTL | Access details about a resource and its associated menu item.<br><br>See Viewing Related Information Content Details |

## Understanding Context Manager Data

This section describes the pages that allow portal administrators to view and gather information about where Context Manager pagelets are deployed in the portal. In addition, you can perform searches to determine which pieces of content, which contacts, or which resources have been assigned by topic experts to specific template pagelet–menu item combinations.

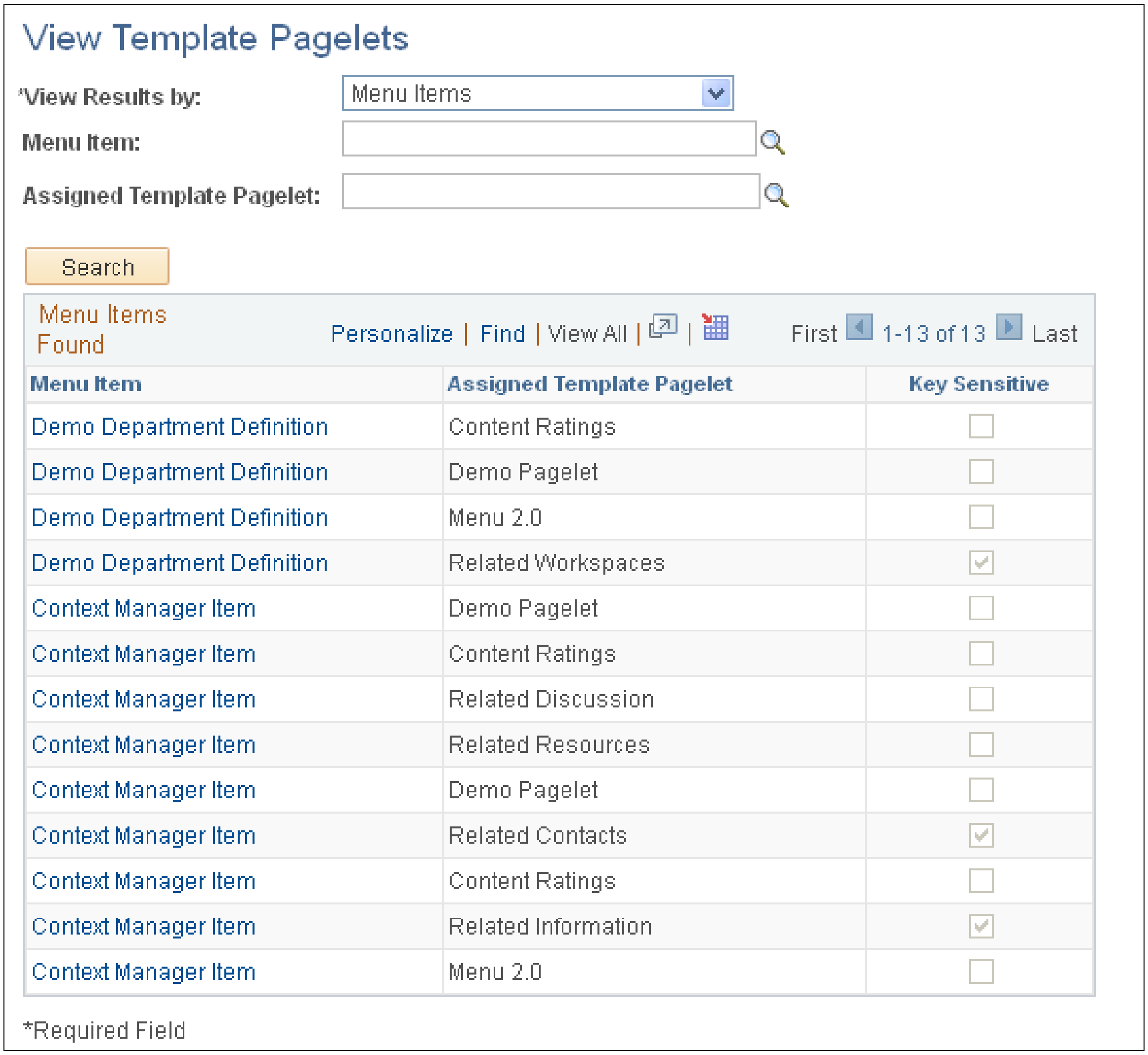
 

## View Template Pagelets Page

To access the View Template Pagelets page select Portal Administration, Context, Context Manager, View Template Pagelets.

**Image: View Template Pagelet page**

This example illustrates the fields and controls on the View Template Pagelet page. You can find definitions for the fields and controls later on this page.




| | |
|---|---|
| **View Results By** | Select the criteria by which you want to view results. Available values include:<br>• *Menu Items.* Select to be able to enter menu item and template pagelet search criteria.<br>• *Topic Experts/Moderators.* Select to be able to enter topic expert, menu item, and template pagelet search criteria. When you select this value, the Topic Expert Type options and Topic Expert field display. |

| | |
|---|---|
| **Topic Expert Type** | These options are displayed when the View Results By field value is set to *Topic Experts/Moderators*. Available values include:<br>• *User*: Select to select a user in the Topic Expert field.<br>• *Role*. Select to select a role in the Topic Expert field. |
| **Topic Expert** | This field displays when the View Results By field value is set to *Topic Experts/Moderators*.<br>If you selected *User* in the Topic Expert Type field, select the user name of the topic expert or moderator for which you want to search for associated template pagelets.<br>If you selected *Role* in the Topic Expert Type field, select the role name of the topic expert or moderator for which you want to search for associated template pagelets. |
| **Menu Item** | Select the menu item for which you want to search for associated template pagelets. |
| **Assigned Template Pagelet** | Select the template pagelet for which you want to view associated menu items. |

### Menu Items Found

Displays associated menu items and template pagelets. If the Key Sensitive option is selected, this indicates that the menu item and template pagelet combination contains key sensitive fields.

Select a Menu Item link to access the menu item.

## Viewing Related Information

Access one of the following pages to search for items assigned to template pagelet–menu item combinations:

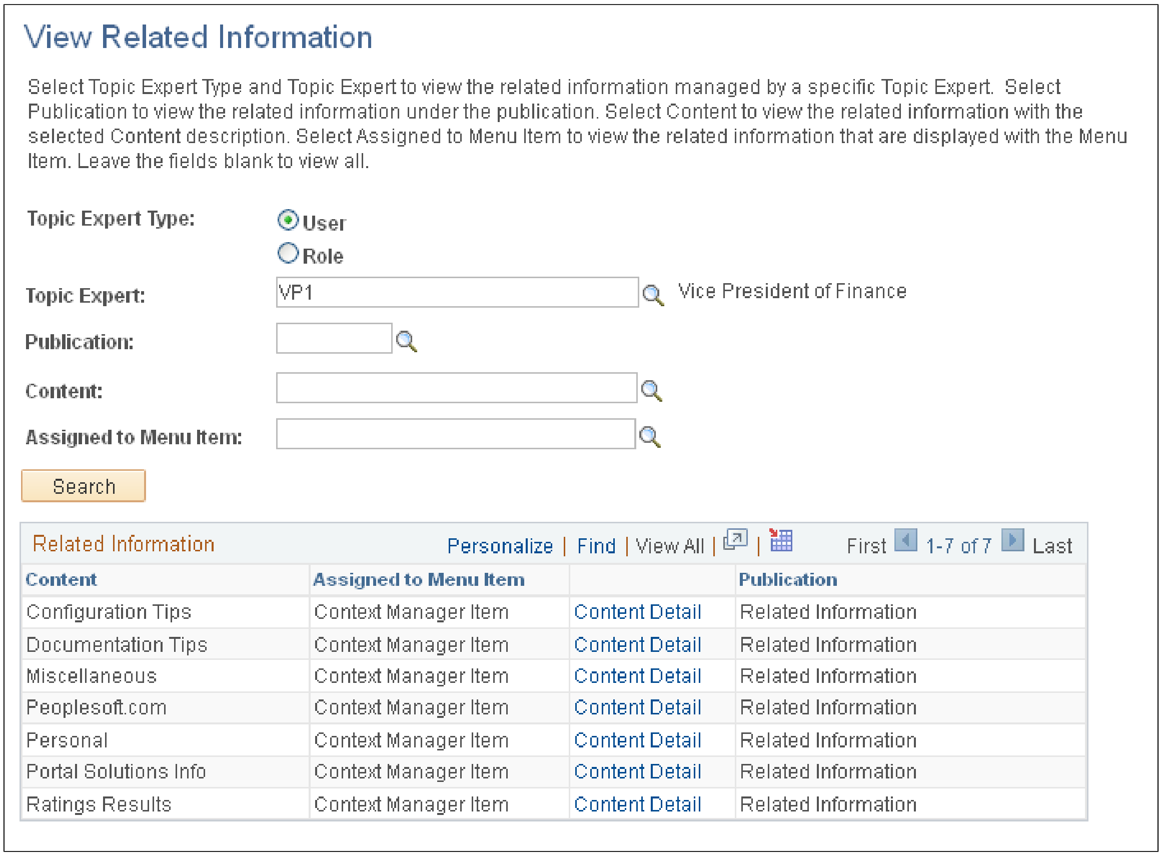
- View Related Contacts page (Portal Administration, Context, Related Contacts, View Related Contacts).
- View Related Information page (Portal Administration, Context, Related Information, View Related Information).

- View Related Resources page (Portal Administration, Context, Related Information, View Related Resources).

**Image: View Related Information page**

The following example illustrates the View Related Information page.




The View Related Contacts page, View Related Information page, and View Related Resources page all display the following page elements.

| | |
|---|---|
| **Topic Expert Type** | Select *User* or *Role* to specify the type of topic expert. |
| **Topic Expert** | Select a user ID or role name. Leave this field blank to search for items assigned by all topic experts. |
| **Publication** | Select the publication number for the template pagelet publication. Leave this field blank to search for items assigned to all template pagelet publications. |
| **Content or Related Contact** | Select the content ID or related contact ID. Leave this field blank to search for assignments of all content or all contacts. |
| **Assigned to Menu Item** | Select the menu item. Leave this field blank to search for items assigned to all menu items. |
| **Search** | Click to execute the search based on the specified criteria. |

**Content Details**

Select a Content Details link to access the Content Detail page for that item.

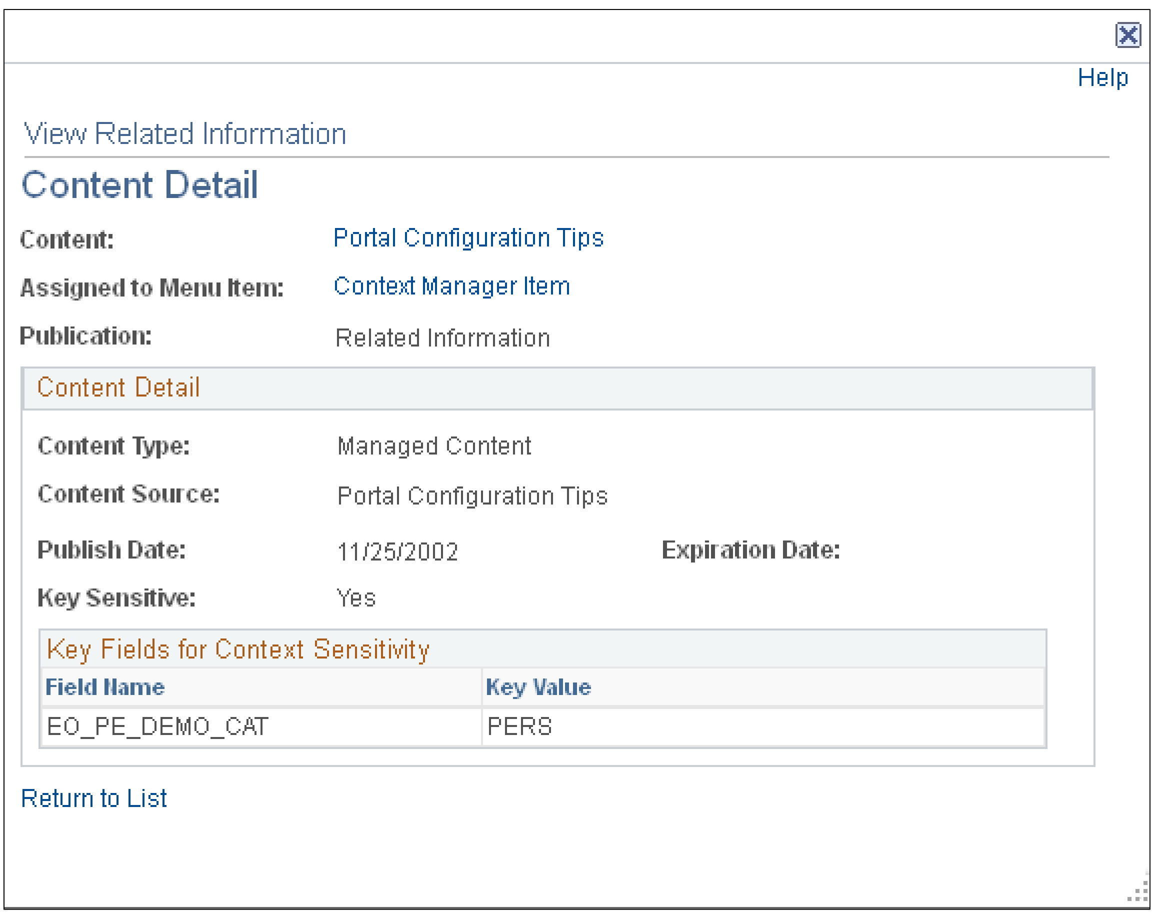
## Viewing Related Information Content Details

Access one of the following pages to view content details:

- View Related Contacts - Content Detail page (click the Content Details link on the View Related Contacts page).
- View Related Information - Content Detail page (click the Content Details link on the View Related Information page).
- View Related Resources - Content Detail page (click the Content Details link on the View Related Resources page).

**Image: View Related Information - Content Detail page**

This example illustrates the fields and controls on the View Related Information - Content Detail page. You can find definitions for the fields and controls later on this page.




The Content Detail pages provide detailed information about each item that has been assigned to a template pagelet–menu item combination. Each page contains the following information:

**Content or Related Contact**

- For related information items, click the Content link to open the content item itself in a separate window.

- For related contact items, click the Related Contact link to open a separate window that allows you to send email to that contact if the contact has defined an email address.
- For related resource items, click the Related Contact link to open the contact's Resource Finder profile in a separate window.

**Assigned to Menu Item** — Click this link to open the target page in a separate window.

# Working With the Context Manager Center and the Context Manager Center Pagelet

This section discusses how to:

- Work with the Context Manager Center.
- Work with the Context Manager Center pagelet.

The Context Manager Center navigation collection and its pagelet are delivered to provide convenient access to the activities involved in using Context Manager.

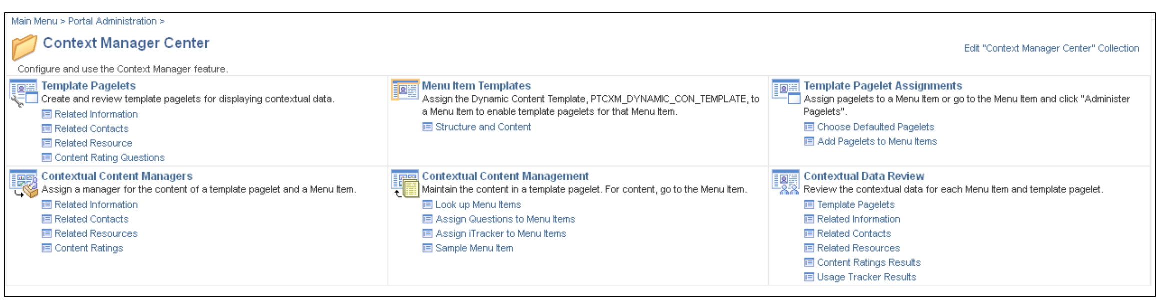
**Note:** Navigation collections provide you with a flexible tool for building alternative taxonomies of the contents stored in your portal registry. These alternative taxonomies, or groupings of links to portal content, can then be deployed to different users or groups of users, creating navigation that specifically addresses your users' business needs.

## Context Manager Center Page

To access the Context Manager Center select Portal Administration, Context Manager Center.

**Image: Context Manager Center**

This example illustrates the fields and controls on the Context Manager Center. You can find definitions for the fields and controls later on this page.




This table lists the custom navigation pages that are used to navigate in the Context Manager Center:

| ***Page Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|
| Context Manager Center | Portal Administration, Context Manager Center | Configure and use the Context Manager feature. |
| Template Pagelets | Click the Template Pagelets link on the Context Manager Center page. | Create or review related publications or content rating questions to be contextually displayed within a template pagelet. |
| Menu Item Templates | Click the Menu Item Templates link on the Context Manager Center page. | Assign the Dynamic Content Template, PTCXM_DYNAMIC_CON_TEMPLATE, to a menu item to enable template pagelets for that menu item. |
| Template Pagelet Assignments | Click the Template Pagelet Assignments link on the Context Manager Center page. | Determine which template pagelets are displayed with each menu item. |
| Contextual Content Managers | Click the Contextual Content Managers link on the Context Manager Center page. | Assign users/roles to specific menu item and template pagelet combinations.<br><br>Content displayed within a template pagelet is regulated and maintained according to the menu item. |
| Contextual Content Management | Click the Contextual Content Management link on the Context Manager Center page. | Assign content displayed in each template pagelet at the menu item level.<br><br>• For related information, contacts, or resources, navigate to the menu item, then add or edit the template pagelet content.<br><br>• For rating surveys, add the menu item to the question. |
| Contextual Data Review | Click the Contextual Data Review link on the Context Manager Center page. | Review the contextual data for each menu item and template pagelet. |

## Context Manager Center Pagelet

Access the Context Manager Center Pagelet on the portal homepage.

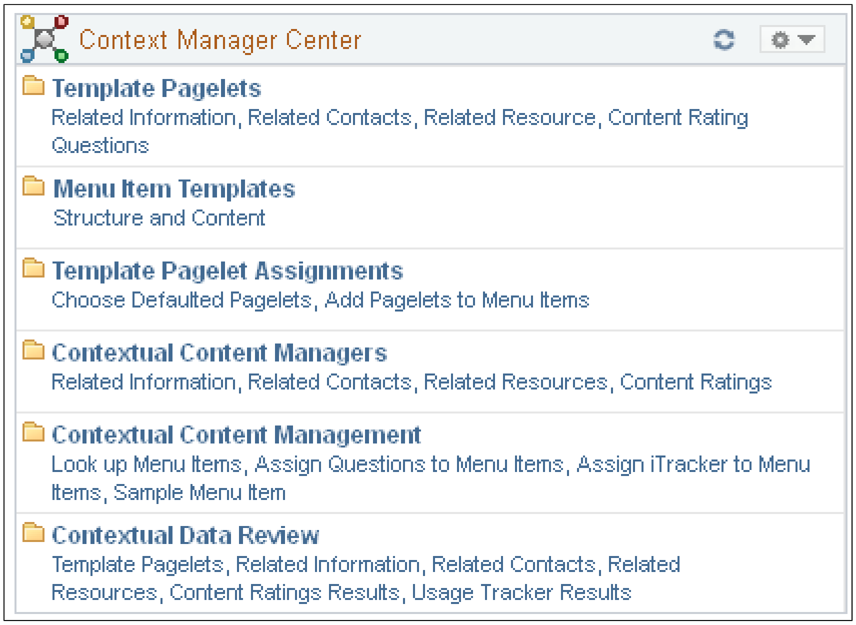
---

**Note:** The Context Manager Center Pagelet is also available on the Administration tab.

---

**Image: Context Manager Center pagelet**

This example illustrates the fields and controls on the Context Manager Center pagelet.




The Context Manager Center pagelet is a navigation collection displayed as a pagelet.

Chapter 18

# Working With Context Manager Pagelets

## Understanding Context Manager Pagelets

**Important!** As of PeopleSoft Interaction Hub 9.1 Revision 2 and PeopleTools 8.53, the Context Manager feature and associated pagelets have been deprecated. The PeopleSoft Related Content Framework provides a broader and more flexible framework for contextually related content.

Context Manager provides the user with immediate, relevant information for any business transaction without requiring a manual search. To the users, 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. Therefore, Context Manager can be considered to be the framework within which features—such as, related information, related contacts, related resources, related discussions, related workspaces, related links, and content ratings—operate.

**Note:** Defined security rules are maintained such that items to which a user does not have access will not appear.

Context Manager is just one method that PeopleSoft Interaction Hub delivers for providing contextually relevant information to your users. PeopleSoft Interaction Hub also provides a general purpose solution that can be deployed to any of your PeopleSoft application pages. PeopleSoft Interaction Hub related content services provide PeopleSoft Interaction Hub features on PeopleSoft application pages.

See Delivered Related Content Services.

Once pagelets have been assigned to menu items, these pagelets can be used by:

- Topic experts to manage content.
- Users to view the added content.

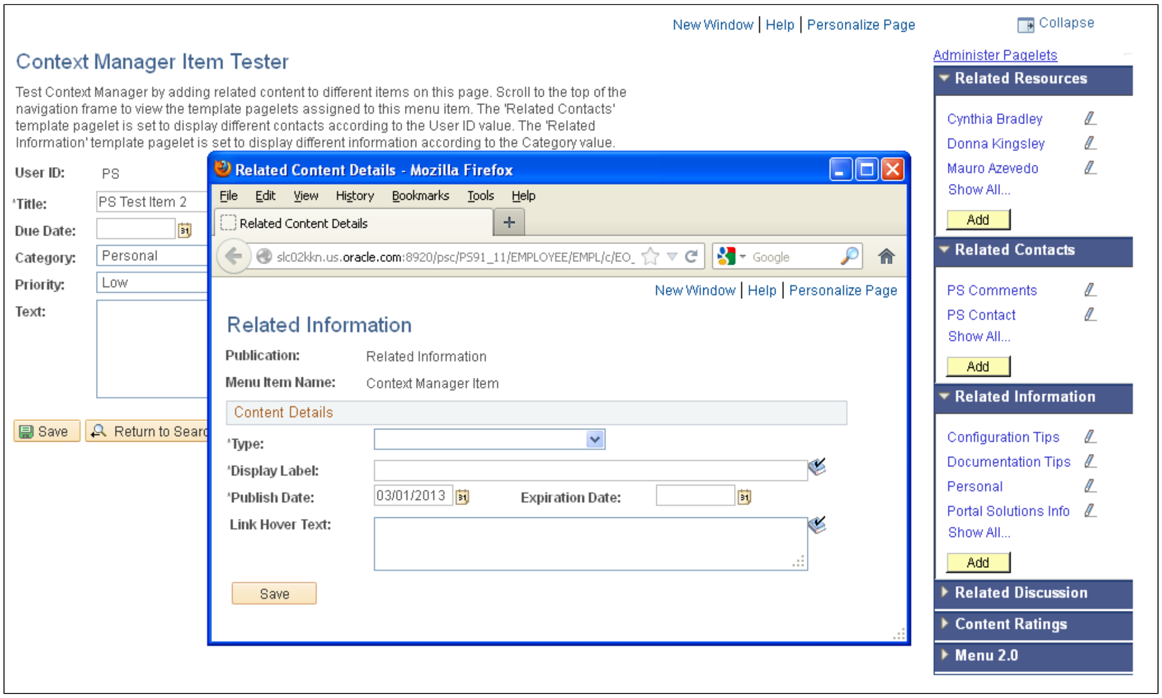
## Managing Content in the Context Manager Pagelets

Context Manager pagelets provide features for topic experts to manage the content items displayed within each pagelet. Topic experts are responsible for adding, editing, expiring, or deleting content items for each combination of menu item and template pagelet publication.

The following example shows the Context Manager Item Tester page. On the right side of the page the Context Manager frame appears, displaying a number of Context Manager pagelets. In this example, the topic expert has clicked the Add button in the Related Information pagelet, which opens the Related Information page in a separate window, allowing the expert to add a new content item.

**Image: Related Information page**

This example illustrates a topic expert adding content to the Related Information pagelet.




## Viewing Content in the Context Manager Pagelets

Unlike homepage pagelets, Context Manager pagelets display in the Context Manager frame on the right side of the page. The Context Manager frame displays when you accesses a transaction or page to which one or more of the pagelets has been assigned. The Context Manager pagelets are designed to provide convenient access to data that is contextually relevant to the transaction or page being displayed.

# Working With the Context Manager Frame

Access a page that has the dynamic content template and pagelets assigned.

**Image: Context Manager frame**

This example illustrates the fields and controls on the Context Manager frame. You can find definitions for the fields and controls later on this page.


| | |
|---|---|
| **Expand** | Click the Expand Contextual Pagelets button to expand the Context Manager frame to display the configured pagelets. |
| **Collapse** | Click the Collapse Contextual Pagelets button to collapse the Context Manager frame to hide the configured pagelets. |

**Administer Pagelets**

Click the Administer Pagelets link to access the Assign Template Pagelets page to manage template pagelets assigned to this menu item.

---

**Note:** The Administer Pagelets link displays for portal administrators with privileges to manage template pagelet assignments.

---

See Assign Template Pagelets Page.

**or**

Click the Maximize button or Minimize button to display or hide the contents of a specific pagelet.

**<link title>**

Click the title of a link to open that content item in a separate browser window.

---

**Note:** A maximum of five links can appear on each pagelet. If more than five links are available, the pagelet displays the five most recently added links along with a Show All link. You can click this link to access a page listing all available links.

---

**Note:** The system checks the publication and expiration dates and displays only currently active content.

---

Click the Edit this link button to edit the attributes of this content item.

---

**Note:** The Edit this link button displays for topic experts who have been assigned to manage content for this pagelet–menu item combination.

---

**Add**

Click the Add button to add a new content item to this pagelet.

---

**Note:** The Add button displays for topic experts who have been assigned to manage content for this pagelet–menu item combination.

---

# Working With the Related Contacts Pagelet

This topic discusses how to view, add and edit related contacts and use the Related Contacts pagelet.

## Pages Used to Work With the Related Contacts Pagelet

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| Contact User Page | EPPRC_SEND_EMAIL | Open a new browser window to send an email to a related contact. |

| *Page Name* | *Definition Name* | *Usage* |
|---|---|---|
| Related Contacts List Page | EPPRC_EMAIL_EDIT | Open a new browser window to view the entire list of related contacts.<br><br>From this page, topic experts can also maintain related contacts. |
| Related Contact Page | EPPRC_EMAIL_DTL | Open a new browser window to add a new related contact or edit an existing related contact.<br><br>Only topic experts can add or edit related contacts. |

## Related Contacts Pagelet

**Image: Related Contacts pagelet**

This example illustrates the fields and controls on the Related Contacts pagelet. You can find definitions for the fields and controls later on this page.


Use these elements in the Related Contacts pagelet:

**<Contact description>**

Click a contact link to open a new browser window showing the Contact User page on which you can send an email to the selected contact.

Click the Edit this link button to open a new browser window showing the Related Contact page on which you can update information for the contact.

**Note:** The Edit this link button displays for topic experts only.

**Show All...**

Click the Show All... link to open a new browser window showing the Related Contacts List page on which you can view the complete list of contacts.

**Add**

Click the Add button to open a new browser window showing the Related Contact page on which you can add a new contact for the current menu item.

**Note:** The Add button displays for topic experts only.

## Contact User Page

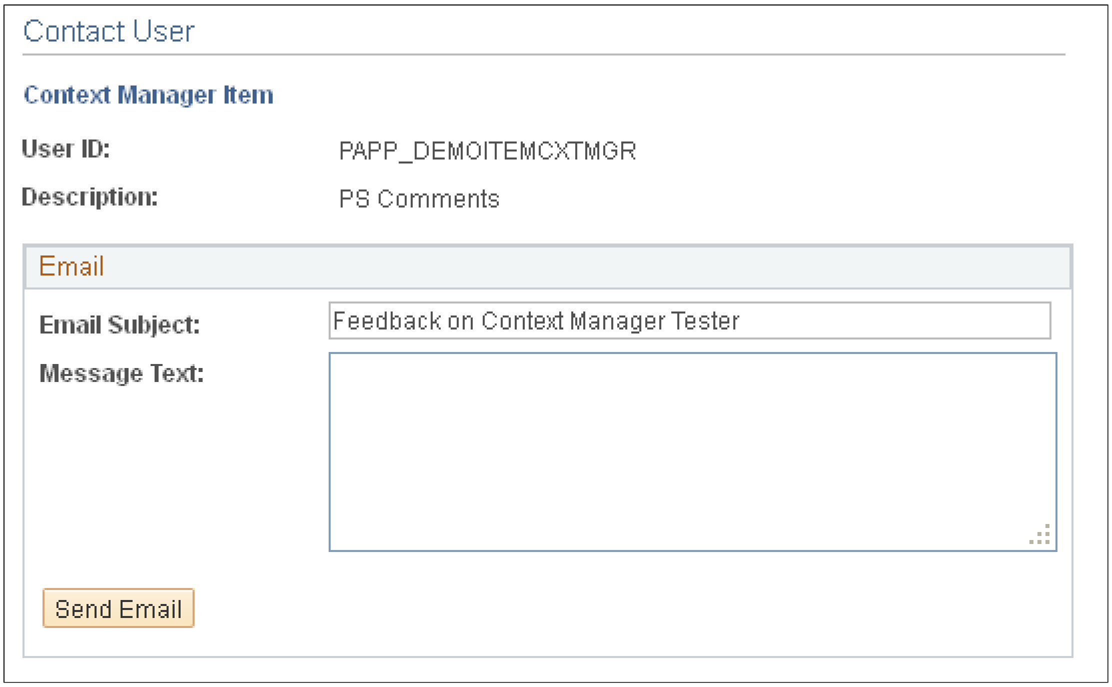
Use the Contact User page (EPPRC_SEND_EMAIL) to open a new browser window to send an email to a related contact.

**Navigation**

Click the name of a contact in the Related Contacts pagelet or click the email button on the Related Contacts List page.

**Image: Contact User page**

This example illustrates the fields and controls on the Contact User page. You can find definitions for the fields and controls later on this page.




| | |
|---|---|
| **User ID and Description** | Displays the user ID and description of the selected contact. |
| **Email Subject** | Enter a subject for your email.<br>**Note:** The topic expert can define a default email subject, which you can override, on the Related Contact page. |
| **Message Text** | Enter the email message. |
| **Send** | Click to send your email. A confirmation page appears to inform you that your email was transmitted. |

## Related Contacts List Page

Use the Related Contacts List page (EPPRC_EMAIL_EDIT) to open a new browser window to view the entire list of related contacts.

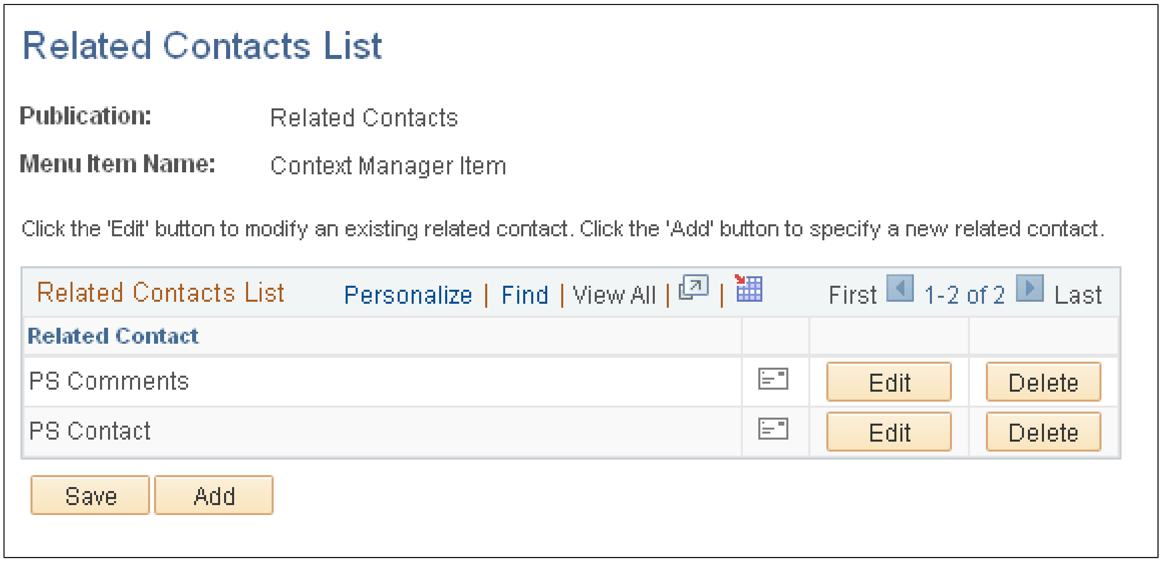
 

**Navigation**

Click the Show All… link in the Related Contacts pagelet.

**Image: Related Contacts List page**

This example illustrates the fields and controls on the Related Contacts List page. You can find definitions for the fields and controls later on this page.




Use the Related Contacts List page to send an email to any of the related contacts.

---

**Note:** From this page, topic experts can also maintain related contacts.

---

| | |
|---|---|
|  | Click the Email button to access the Contact User page to send an email to that contact. |
| **Edit** | Click the Edit button to access the Related Contact page to edit the contact information for this related contact. |
| **Delete** | Click the Delete button to delete this related contact. |
| **Add** | Click the Add button to access the Related Contact page to add a new related contact. |
| **Save** | Click the Save button to save your changes. |

---

**Note:** The Edit, Delete, Add and Save buttons appear only for topic experts assigned to a specific pagelet-menu item combination.

---

## Related Contact Page

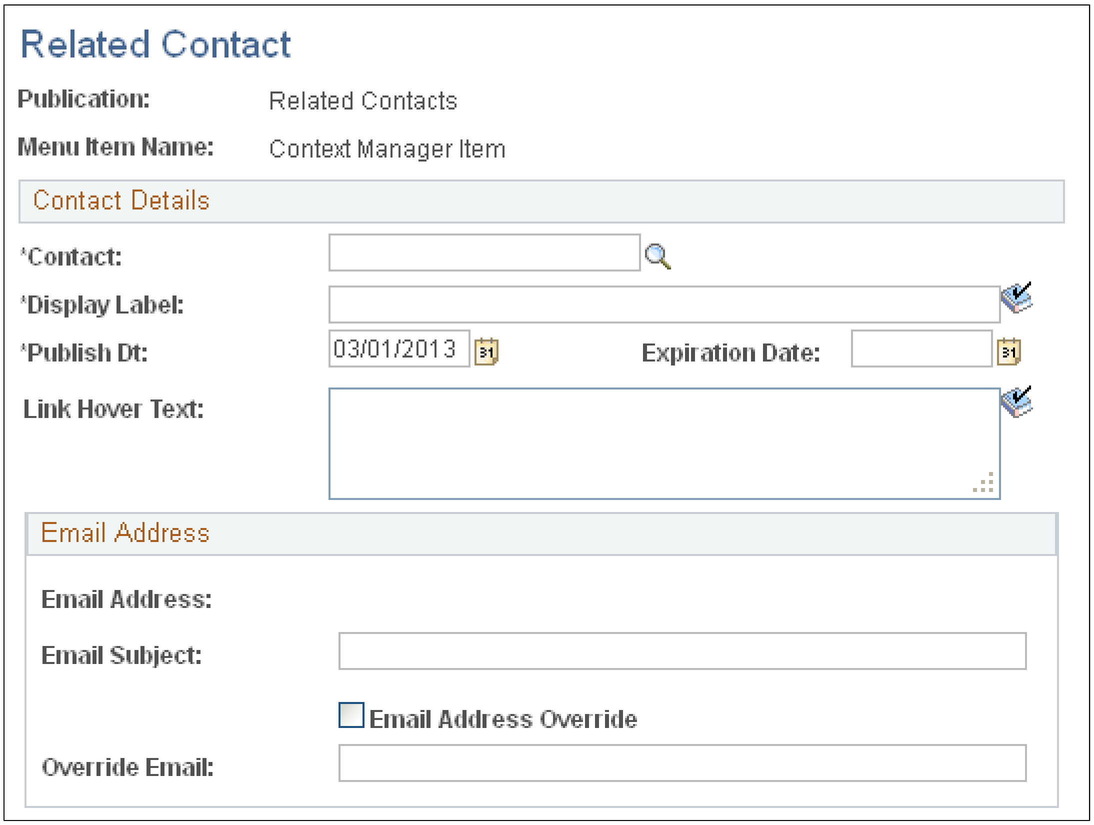
Use the Related Contact page (EPPRC_EMAIL_DTL) to open a new browser window to add a new related contact or edit an existing related contact.

**Navigation**

- Click the Edit this link button or the Add button in the Related Contacts pagelet.
- Click the Edit button or the Add button on the Related Contacts List page.

**Image: Related Contact page**

This example illustrates the fields and controls on the Related Contact page. You can find definitions for the fields and controls later on this page.




| | |
|---|---|
| **Publication** | Displays the name of the template pagelet publication. |
| **Menu Item Name** | Displays the name of the current menu item. |
| **Contact** | Select the user ID of the related contact. |
| **Display Label** | Enter a description for the contact, which appears in the Related Contacts pagelet and on the Related Contacts List page. |
| **Publish Dt (publish date)** | Select the date on which the contact should be published and available for viewing in the pagelet for this menu item. |
| **Expiration Date** | Select the date on which you want this contact to become inactive for this menu item. Leave this field blank if there is no expiration date.<br>**Note:** Enter a date in the past to immediately remove a related contact link from the pagelet. |

| | |
|---|---|
| **Link Hover Text** | Enter tool tip text that you want to display when the user's cursor hovers over the link for this related contact. |
| **Email Address** | Displays the contact's default email address from his or her system profile. |
| **Email Subject** | Enter a default subject to appear when a user sends an email to this contact. |
| **Email Address Override** | Select if you want to override the default email address for the contact. |
| **Override Email** | If you selected the *Email Address Override,* option, enter the overriding email address for this contact. |

# Working With the Related Discussion Pagelet

This section provides an overview of forums started from the Related Discussion pagelet and discusses how to:

- Use the Related Discussion pagelet.
- Participate in and manage forums started from the Related Discussion pagelet.

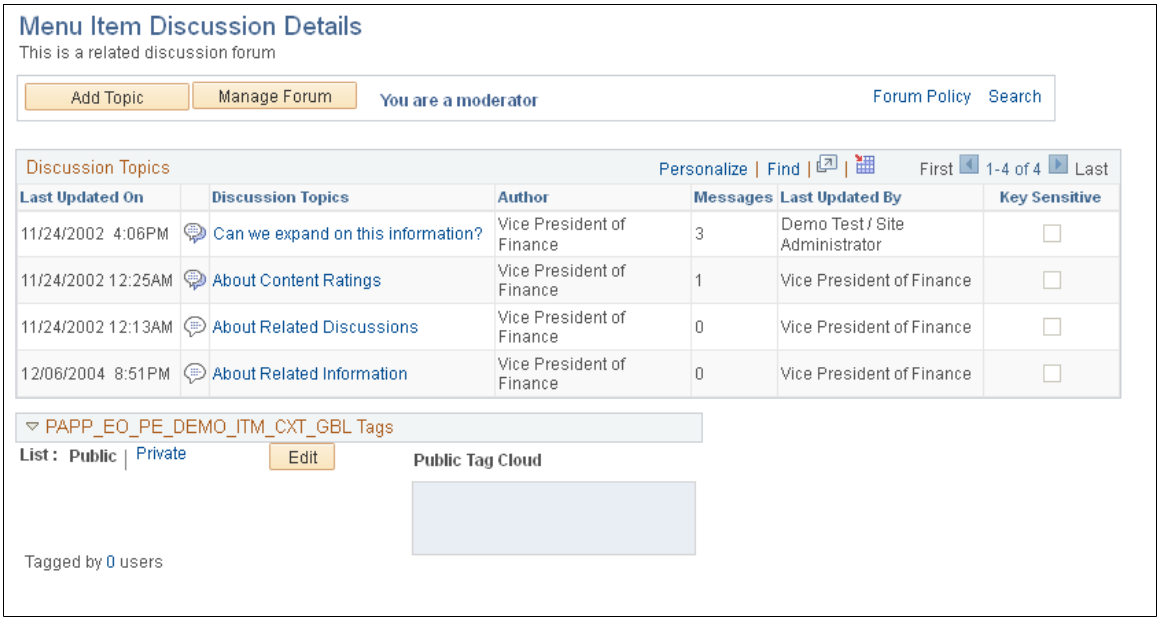
## Understanding Forums Started from the Related Discussion Pagelet

Discussions started from the Related Discussion pagelet are similar to stand alone discussions created in the portal. However, these discussions have several distinctions from stand alone discussions including:

- You cannot define the name of the discussion. While the discussion for each menu item is distinct and separate, all such discussions have the same title, Menu Item Discussion Details, on the discussion forum's homepage.

  **Image: Discussion forum homepage (discussion started from the Related Discussion pagelet)**

  The following example illustrates the Discussion forum homepage (discussion started from the Related Discussion pagelet).




---

**Note:** The menu item ID appears as the title for the Tags expandable section.

---

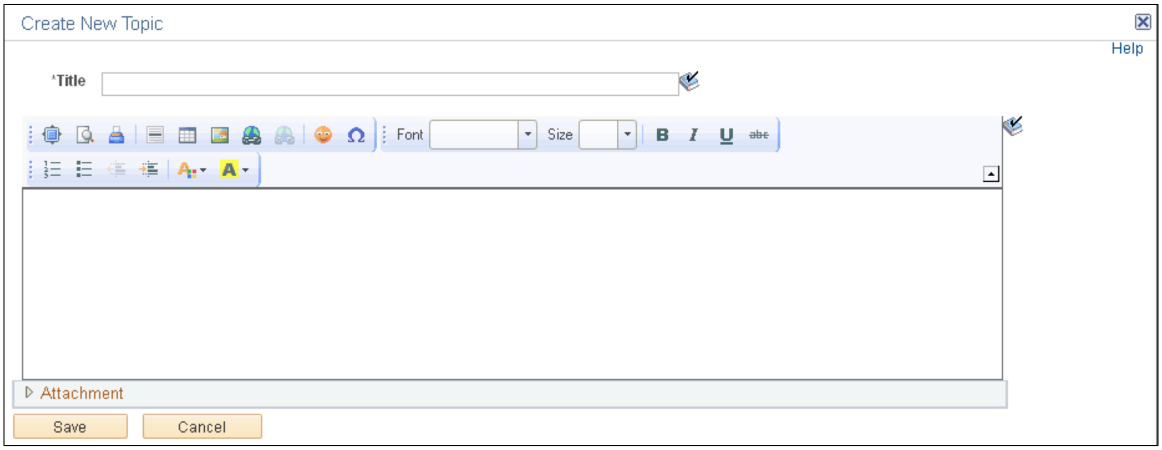
- The first user to access the transaction or page after the Related Discussion pagelet has been assigned to the menu item becomes the forum moderator by default. This user (or other users with portal administrator or discussion administrator privileges) is then responsible for managing the forum including maintaining forum participants.

- You cannot set alerts for discussion topics created in the Related Discussion pagelet.

**Image: Create New Topic page**

The following example illustrates the Create New Topic page.




## Related Discussion Pagelet.

**Image: Related Discussion pagelet**

The following example illustrates the Related Discussion Pagelet. Access the Related Discussion Pagelet in the Context Manager frame as shown below.


| | |
|---|---|
| **<Topic title>** | Click the link for a discussion topic to view the Post Details page. |
| **View / Add Topic** | Click the View / Add Topic link access discussion forum homepage. |
| **Manage** | Click the Manage link to open the Forum Privileges page in a new window. |

**Note:** The Manage link appears for the first user to access the page after the Related Discussion pagelet has been assigned. This user becomes the default forum moderator. The Manage link also appears for users who have discussion administrator privileges.

## Participating in and Managing Forums Started from the Related Discussion Pagelet

Discussions started from the Related Discussion pagelet are similar to stand alone discussions created in the portal.

To participate in a discussion started from the Related Discussion pagelet, see the topic on discussion forums in this PeopleBook.

See Participating in Discussion Forums.

To manage in a discussion forum started from the Related Discussion pagelet, see the topic on discussion forums in this PeopleBook.

See Creating Discussion Forums.

# Working With the Related Information Pagelet

This topic discusses using the Related Information pagelet to view related information item and add or edit the related information.

## Pages Used to Work With the Related Information Pagelet

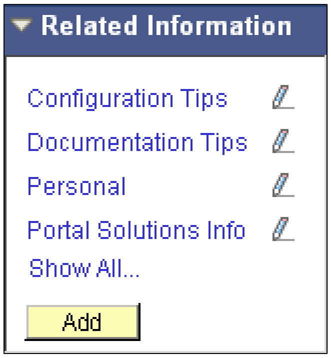
| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| Related Information <Content Title> Page | EPPCM_PUB_VIEWHTML<br><br>EPPCM_PUB_VIEWFILE | Open a new browser window to view the selected related information item. |
| Related Information List Page | EPPRC_CONT_EDIT | Open a new browser window to view the entire list of related information items.<br><br>From this page, topic experts can also maintain related information items. |
| Related Information Page | EPPRC_CONT_DTL | Open a new browser window to add a new related information item or edit an existing related information item.<br><br>Only topic experts can add or edit related information items. |

## Related Information Pagelet

**Image: Related Information pagelet**

This example illustrates the fields and controls on the Related Information pagelet. You can find definitions for the fields and controls later on this page.




Use these elements in the Related Information pagelet:

**<Content description>**

Click a content link to open a new browser window displaying the related information item. The links listed in the Related Information pagelet can connect to any of the following:

- External websites
- File attachments
- Managed content items
- Menu items

Click the Edit this link button to open a new browser window showing the Related Information page on which you can update information for the related information item.

**Note:** The Edit this link button displays for topic experts only.

**Show All...**

Click the Show All... link to open a new browser window showing the Related Information List page on which you can view the complete list of items.

**Add**

Click the Add button to open a new browser window showing the Related Information page on which you can add a new related information item for the current menu item.

**Note:** The Add button displays for topic experts only.

## Related Information <Content Title> Page

Use the Related Information - <Content Title> page (EPPCM_PUB_VIEWHTML) to open a new browser window to view the selected related information item.

**Navigation**

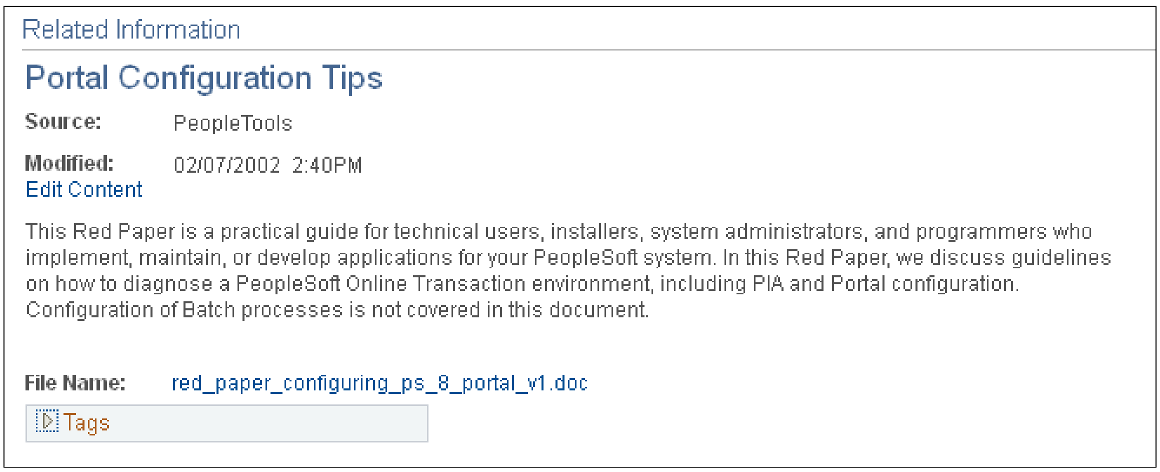
Click the link for a related information item in the Related Information pagelet.

Depending on the type of related information, a new browser window is opened displaying the following:

- The web site when the information type is *External Website.*
- The file attachment when the information type is *File Attachment.*
- The Related Information - <Content Title> page when the information type is *Managed Content.*

  **Image: Related Information - <Content Title> page**

  The following example illustrates the Related Information List page.




  **Note:** A second browser window is opened displaying the content itself if it is a managed content attachment.

- The PeopleSoft transaction page when the information type is *Menu Item.*

## Related Information List Page

Use the Related Information List page (EPPRC_CONT_EDIT) to open a new browser window to view the entire list of related information items.

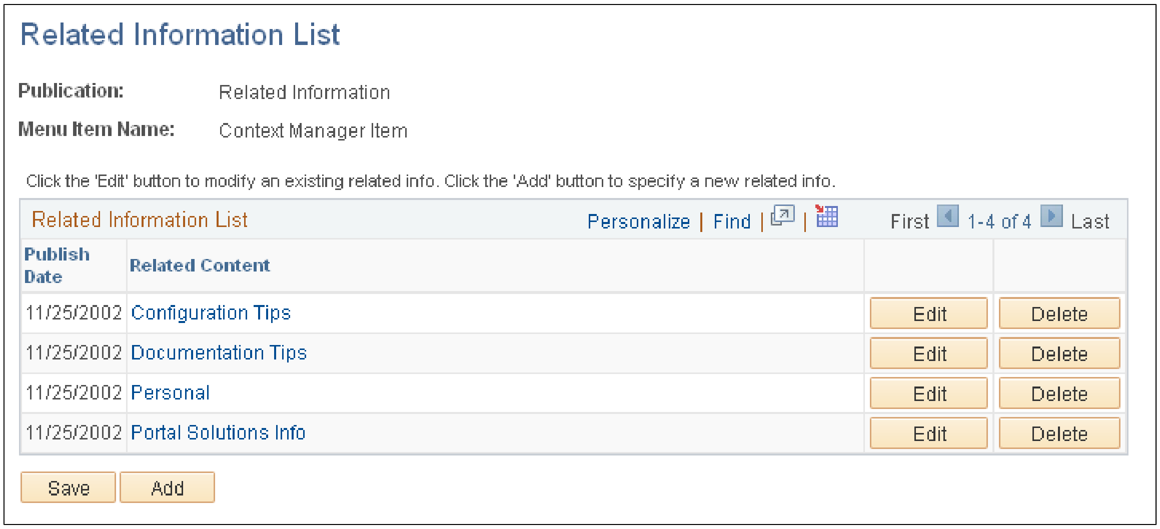
 

**Navigation**

Click the Show All... link in the Related Information pagelet.

**Image: Related Information List page**

This example illustrates the fields and controls on the Related Information List page. You can find definitions for the fields and controls later on this page.




| | |
|---|---|
| **Related Content** | Click a link to open a new browser window displaying the content item or the Related Information - <Content Title> page for an item of managed content. |
| **Edit** | Click the Edit button to access the Related Information page to edit the information for this related information item. |
| **Delete** | Click the Delete button to delete this related information item. |
| **Add** | Click the Add button to access the Related Information page to add a new related information item. |
| **Save** | Click the Save button to save your changes. |

---

**Note:** The Edit button, Delete button, Add button and Save button appear only for topic experts assigned to this pagelet-menu item combination.

---

## Related Information Page

Use the Related Information page (EPPRC_CONT_DTL ) to open a new browser window to add a new related information item or edit an existing related information item.

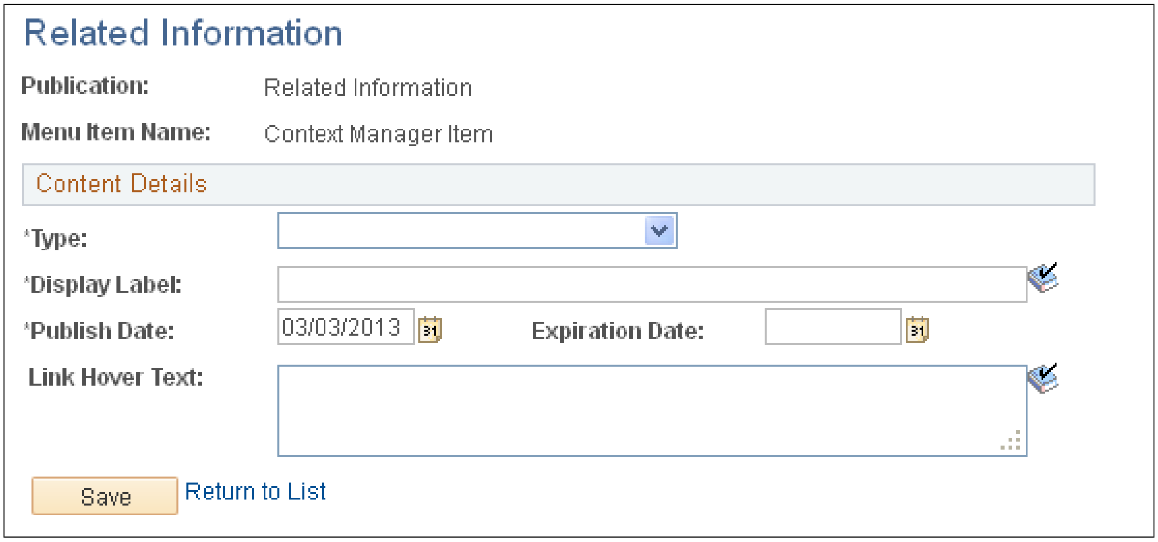
 

### Navigation

- Click the Edit this link button or the Add button in the Related Information pagelet.
- Click the Edit button or the Add button on the Related Information List page.

### Image: Related Information page

This example illustrates the fields and controls on the Related Information page. You can find definitions for the fields and controls later on this page.




**Publication**

Displays the name of the template pagelet publication.

**Menu Item Name**

Displays the name of the menu item for this pagelet–menu item combination.

**Content Type**

If the administrator specified *All Types* on the Related Information Publication page, use the drop-down list to select a type for this related information item:

- *External Website* — Specify an external website URL as related information.
- *File Attachment* — Upload a text file as related information.
- *Managed Content* Select an item of managed content as related information.
- *Menu Item* — Select a menu item from the portal registry as related information.

---

**Important!** If the portal administrator specified a content type for the publication on the Related Information Publication page, then that value is displayed in this field and should not be changed.

---

**Note:** After you select a type, the page presents only the fields necessary to further define the selected related information type.

| | |
|---|---|
| **Display Label** | Enter a value in this required field before attempting to select or define an item. |
| **URL** | If the type is set to *External Website,* enter the URL for the website. |
| **File Name** | If the type is set to *File Attachment,* click the Add Attachment button to upload the file.<br><br>Once uploaded, the name of the file appears as a link. Click the link to display the contents of the file in a new browser window. Click the Delete Attachment button to remove an uploaded file. |
| **Content Title** | If the type is set to *Managed Content,* click the Select Content button to select the item of managed content.<br><br>Once selected, the content title appears as a link. Click the link to display the item in a new browser window. Click the Re-Select Content button to select a different item of managed content. |
| **Menu Item Name** | If the type is set to *Menu Item,* select the menu item. |
| **Publish Dt (publish date)** | Select the date on which the information should be published and available for viewing in the pagelet for this menu item. |
| **Expiration Date** | Select the date on which you want this related information link to become inactive for this menu item. Leave this field blank if there is no expiration date.<br><br>**Note:** Enter a date in the past to immediately remove a related information link from the pagelet. |
| **Link Hover Text** | Enter tool tip text that you want to display when the user's cursor hovers over the link for this related information item. |

## Working With the Related Resources Pagelet

This topic discusses using the Related Resources pagelet to view related resources profile and to add, edit and search a related resource.

**Note:** You must set up Resource Finder and its search indices before you can use Related Resources pagelet. In addition, the Resource Finder installationoption must be enabled.

## Pages Used to Work With the Related Resources Pagelet

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| Resource Finder Profile Page | EPX_PRF_MAIN | Open a new browser window to view the Resource Finder profile for the selected resource. |
| Related Resources List Page | EPX_DIRCNTC_EDIT | Open a new browser window to view the entire list of related resources.<br><br>From this page, topic experts can also maintain related resources. |
| Related Resources Page | EPX_DIRCNTC_DTL | Open a new browser window to add a new related resource or edit an existing related resource.<br><br>Only topic experts can add or edit related resources. |
| Related Resources - Advanced Search Page | EPX_DIRCNTC_SRCH | Search for and select a Resource Finder resource as a related resource. |

### Related Links

"Performing Advanced Resource Finder Searches" (PeopleSoft Interaction Hub 9.1: Resource Finder)

"Defining Installation Options" (PeopleSoft Interaction Hub 9.1: Portal and Site Administration)

## Related Resources Pagelet

Access the Related Resources Pagelet in the Context Manager frame

**Image: Related Resources pagelet**

This example illustrates the fields and controls on the Related Resources pagelet. You can find definitions for the fields and controls later on this page.


The Related Resources pagelet derives its resources from the Resource Finder feature. Resource Finder is a highly flexible repository that can receive data loads containing information about any entity, along with links that relate these entities to each other. These entities are typically things like customers, suppliers, employees, departments, locations, companies, and business units.

Use these elements in the Related Resources pagelet:

| | |
|---|---|
| **<Resource Name>** | Click a resource name to open a new browser window displaying the Resource Finder profile for that resource. |
|  | Click the Edit this link button to open a new browser window showing the Related Resources page on which you can update information for the related resource.<br><br>**Note:** This control appears for topic experts only. |
| **Show All...** | Click the Show All... link to open a new browser window showing the Related Resources List page on which you can view the complete list of resources. |
| **Add** | Click the Add button to open a new browser window showing the Related Resources page on which you can add a new related resource for the current menu item.<br><br>**Note:** This control appears for topic experts only. |

## Resource Finder Profile Page

Use the Resource Finder profile page (EPX_PRF_MAIN) to open a new browser window to view the Resource Finder profile for the selected resource.

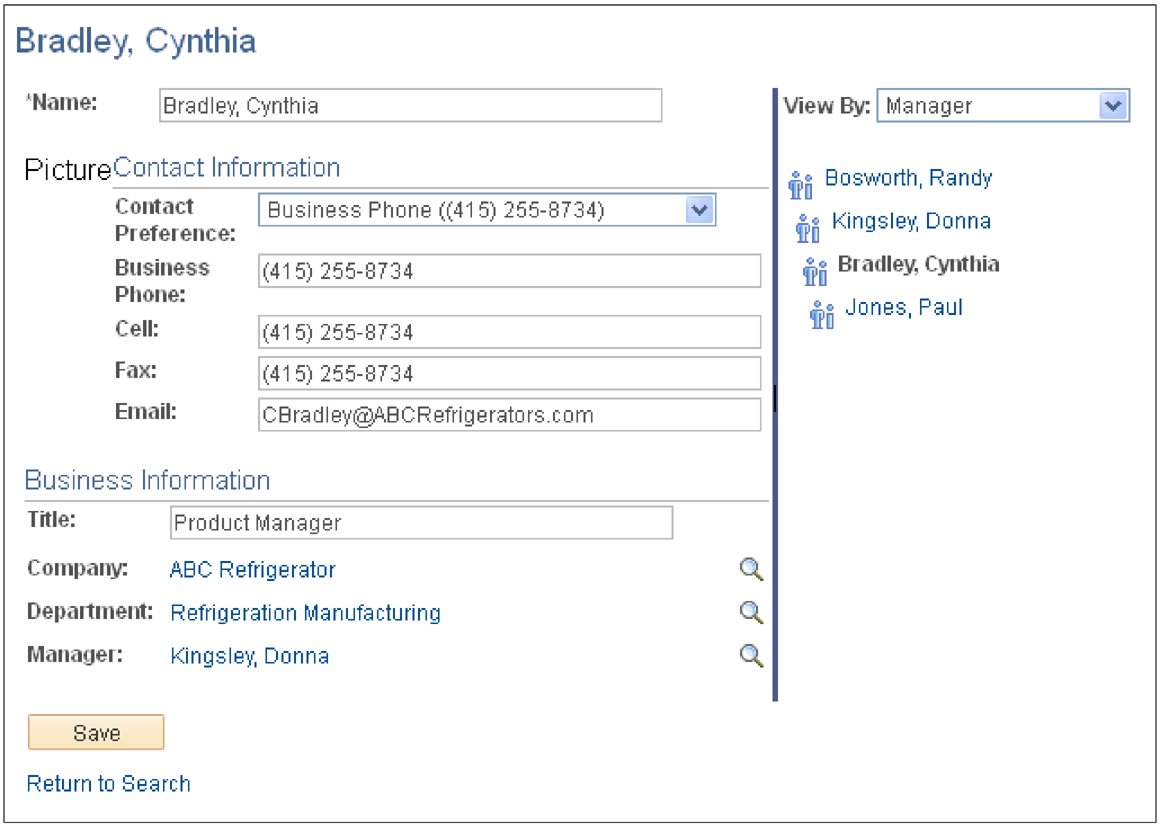
 

**Navigation**

Click the link for a related resource in the Related Resources pagelet.

**Image: Resource Finder profile page**

The following example illustrates the Resource Finder profile page.




A Resource Finder profile displays contact information about a resource along with relationships amongst the resource and other resources in the system. Resource Finder and Resource Finder profiles are discussed in the Resource Finder PeopleBook.

See "Reviewing Participant Profile Changes" (PeopleSoft Interaction Hub 9.1: Resource Finder).

## Related Resources List Page

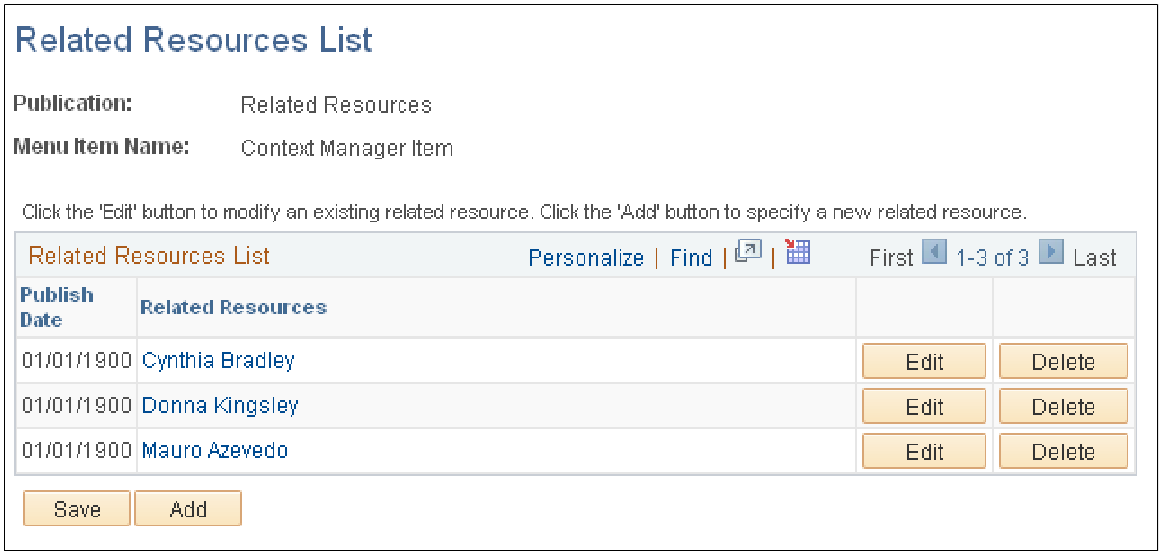
Use the Related Resources List page (EPX_DIRCNTC_EDIT) to open a new browser window to view the entire list of related resources.

**Navigation**

Click the Show All... link in the Related Resources pagelet.

**Image: Related Resources List page**

This example illustrates the fields and controls on the Related Resources List page. You can find definitions for the fields and controls later on this page.




**Related Resources** Click a link to open a new browser window displaying the Resource Finder profile for the related resource.

**Edit** Click the Edit button to access the Related Resources page to edit the information for this related resource.

**Delete** Click the Delete button to delete this related resource.

**Note:**

**Add** Click the Add button to access the Related Resources page to add a new related resource.

**Save** Click the Save button to save your changes.

The Edit button, Delete button, Add button and Save button appear only for topic experts assigned to this pagelet-menu item combination.

## Related Resources Page

Use the Related Resources page (EPX_DIRCNTC_DTL) to open a new browser window to add a new related resource or edit an existing related resource.

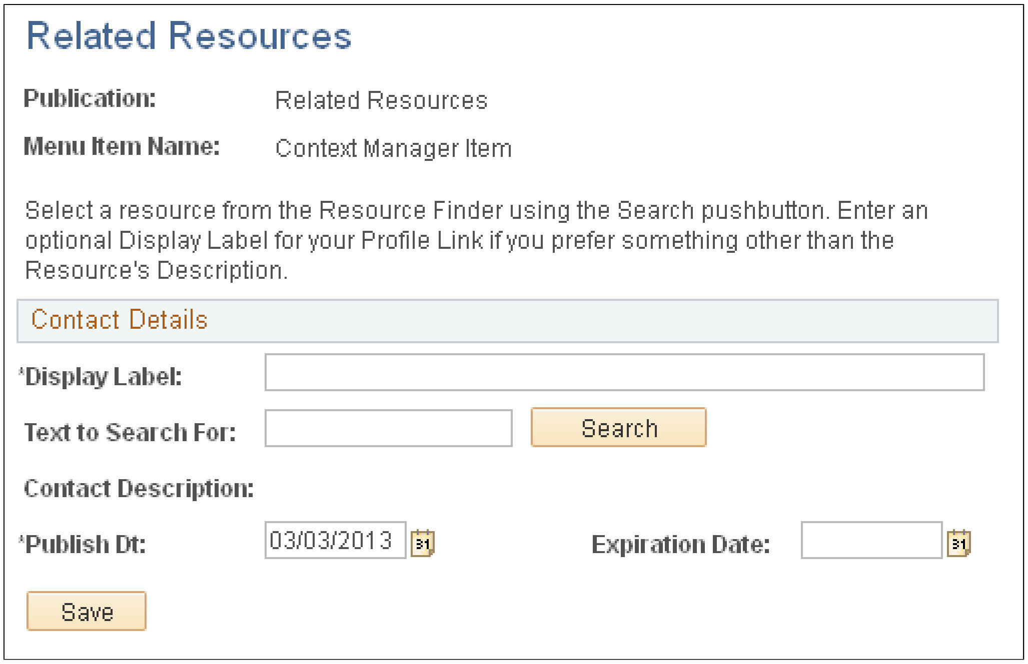
 

### Navigation

Click the Edit this link button or the Add button in the Related Resources pagelet.

**Image: Related Resources page**

This example illustrates the fields and controls on the Related Resources page. You can find definitions for the fields and controls later on this page.




**Publication**

Displays the name of the template pagelet publication.

**Menu Item Name**

Displays the name of the menu item for this pagelet–menu item combination.

**Display Label**

Enter the link name that is displayed in the Related Resources pagelet for this resource.

---

**Note:** The default is the name of the resource, which is populated after a resource is selected.

---

**Text to Search For**

Enter search criteria to select a resource from Resource Finder.

**Search**

Click the Search button to access the Related Resources - Advanced Search page.

**Contact Description**

Displays the name of the selected resource.

**Publish Dt (publish date)**

Select the date on which the resource should be published and available for viewing on the pagelet for this menu item.

**Expiration Date**

Select the date on which you want this resource to become inactive for this menu item. Leave this field blank if there is no expiration date.

**Note:** Enter a date in the past to immediately remove a related resource link from the pagelet.

## Related Resources - Advanced Search Page

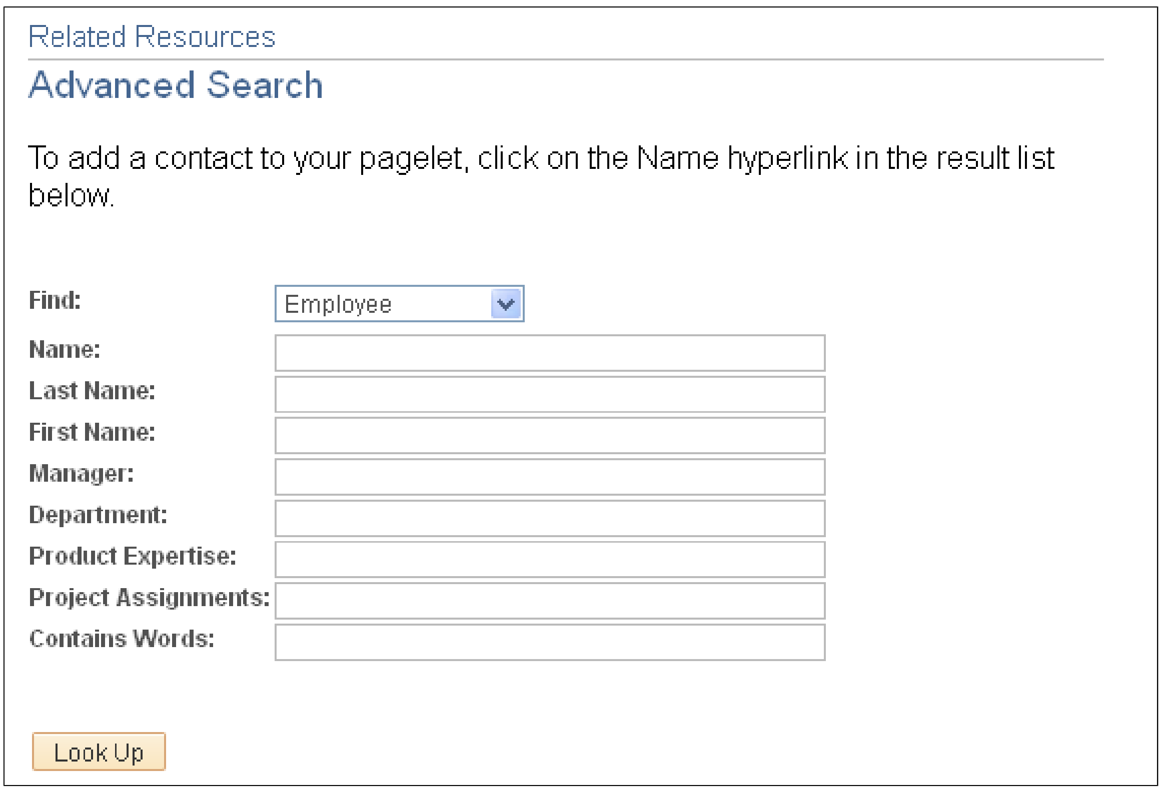
Use the Related Resources - Advanced Search page (EPX_DIRCNTC_SRCH) to search for and select a Resource Finder resource as a related resource.

**Navigation**

Click the Search button on the Related Resources page.

**Image: Related Resources - Advanced Search page**

This example illustrates the fields and controls on the Related Resources - Advanced Search page. You can find definitions for the fields and controls later on this page.




**Find**

Select the resource type: *Customer Contact, Employee,* and *Product Expert.*

**Note:** The resource type determines the available search fields.

**Name**

Enter text to search for in the the resource's name.

**Contains Words**

Enter any text (word, phrase, or word fragment) to search for in all fields of the resource's profile.

**Look Up**

Click the Look Up button to execute the search.

**Name**

Click a Name link in the search results to select that profile as the related resource.

# Working With the Related Workspaces Pagelet

## Pages Used to Work With the Related Workspaces Pagelet

| *Page Name* | *Definition Name* | *Usage* |
|---|---|---|
| "Select A Workspace Template Page" (PeopleSoft Interaction Hub 9.1: Collaborative Workspaces) | EPPCW_WIZ_TMPL | Select the template on which you want to base the new workspace. |
| "Workspaces - Search Page" (PeopleSoft Interaction Hub 9.1: Collaborative Workspaces) | EPPCW_MYWS | Specify criteria to search for workspaces of which you are already a member. |

## Related Workspaces Pagelet

Access the Related Workspaces Pagelet in the Context Manager frame as shown below.

**Image: Related Workspaces pagelet**

This example illustrates the fields and controls on the Related Workspaces pagelet. You can find definitions for the fields and controls later on this page.


**View All Workspaces**

Click to access the Browse Workspaces search page.

See "Workspaces - Search Page" (PeopleSoft Interaction Hub 9.1: Collaborative Workspaces).

**Create Workspace**

Click to display step 1 of the workspace creation wizard.

---

**Note:** When you access this wizard through the Related Workspaces pagelet from the transaction for which you are building this workspace and the transaction has been associated with a workspace template, that recommended template is selected by default, but can be overridden.

---

See "Select A Workspace Template Page" (PeopleSoft Interaction Hub 9.1: Collaborative Workspaces).

# Working With the Content Ratings Pagelet

This topic discusses using the Content Rating pagelet and participating in content rating surveys.

Use the Content ratings survey page (EO_PE_SR_SURVEY) to participate in a content ratings survey associated with the current menu item.

**Navigation**

- Click the link for a survey in the Content Ratings pagelet.
- Click the View Results button after completing the survey.

## Page Used with the Content Ratings Pagelet

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| Content Ratings Survey Page | EO_PE_SR_SURVEY | Participate in a content ratings survey associated with the current menu item. |

## Content Ratings Pagelet

Access the Content Ratings pagelet in the Context Manager frame.

**Image: Content Ratings pagelet**

This example illustrates the fields and controls on the Content Ratings pagelet.


Click a link to access a survey that has been assigned to the menu item.

See Understanding Content Ratings and Usage Tracking (iTracker)

## Content Ratings Survey Page

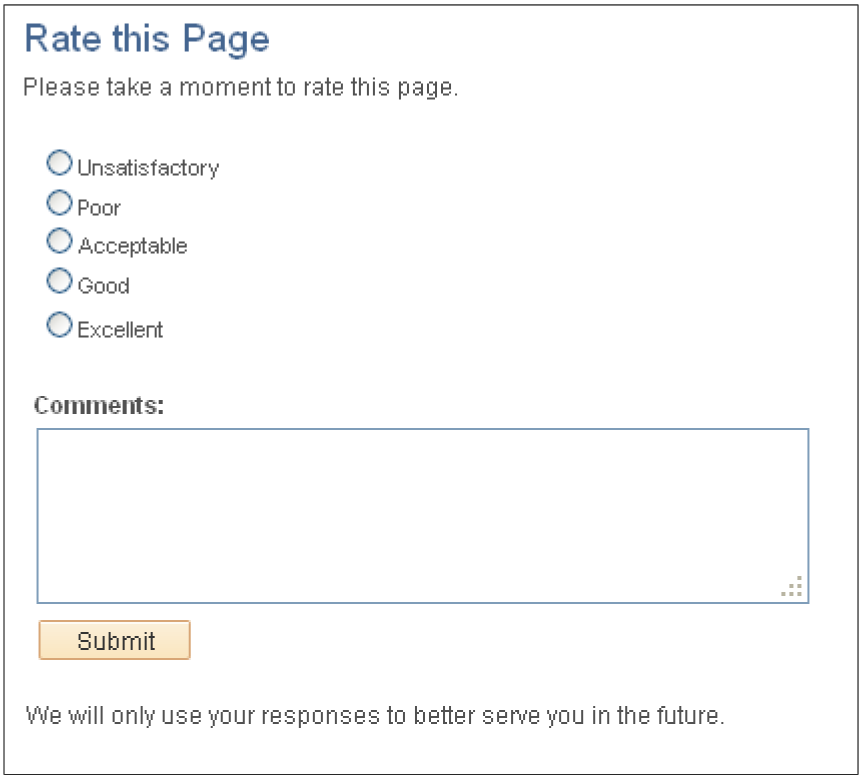
Access a content ratings survey page (click the link for a survey in the Content Ratings pagelet).

**Note:** The actual page name and question depend on the survey.

**Image: Content ratings survey page**

This example illustrates the fields and controls on the Content ratings survey page. You can find definitions for the fields and controls later on this page.




Each content ratings survey consists of a single question. The question can be in the form of multiple choice, ranking list, or a yes/no question.

| | |
|---|---|
| **Comments** | Enter free-form text in this field to add any comments that you have regarding the survey. |
| **Submit** | Click to submit your response. A confirmation page is displayed. |

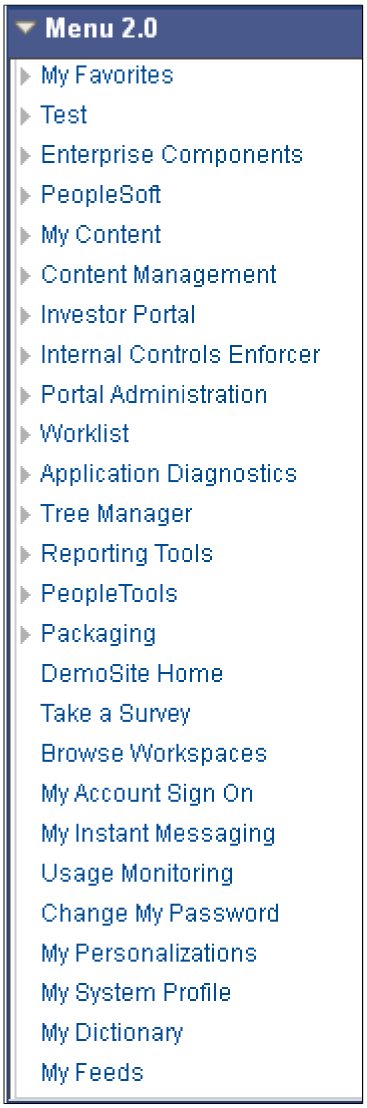
**Note:** From the confirmation page, click theView Results button to view the current results of the survey.

## Working With the Menu 2.0 Pagelet

The Menu 2.0 pagelet replicates the menu items of the drop-down Main Menu and the Enterprise Menu pagelet. The Menu 2.0 pagelet provides you with access to all of your menu items in the Context Manager frame as shown below.

**Image: Menu 2.0 pagelet**

This example illustrates the fields and controls on the Menu 2.0 pagelet.




**Note:**

Chapter 19

# Managing Content Ratings and Usage Tracking (iTracker)

## Understanding Content Ratings and Usage Tracking (iTracker)

Reaction to portal content can be monitored through the following mechanisms:

- Giving users an opportunity to express their opinions.
- Tracking which items users access.

PeopleSoft Interaction Hub includes a content ratings feature to manage user feedback and an iTracker (the invisible usage tracker) to track usage of content. To use these features, the monitored content must use the Context Manager and the Dynamic Content template (PTCXM_DYNAMIC_CON_TEMPLATE). The Dynamic Content template should be configured to include the Content Ratings pagelet (PAPP_SURVEY_LINKS_SCR). You then need to associate the menu item to the poll using the Manage Content Ratings component.

**Note:** If you specify an Context Manager configuration for specific menu items, and you want to deploy a content rating poll to these menu items, you should also assign the Content Ratings pagelet to those menu items in the Context Manager.

### Understanding Content Ratings

The content ratings feature enables you to:

- Configure single-question polls.
- Assign questions to a menu item or a portal-hosted unregistered URL.
- Monitor user feedback.

Content ratings can be set up for managed content and for menu items.

Content ratings administrators can associate multiple content ratings polls with any portal-hosted content, and a poll's questions can be effective-dated to change over time.

The content ratings feature can also be used more broadly as a poll taker. For example, you can ask a range of questions of your users that are not necessarily tied to the content that they are viewing. In those circumstances, we recommend that you deploy a poll to one heavily trafficked menu item or portal-hosted URL. That way, results that you see on the Poll page and Results pages will be grouped properly for non-content related questions, as opposed to being spread out over multiple content items.

Results are accessible to poll respondents on the Content Ratings page when navigating from the Content Ratings pagelet. They are also accessible on the advanced results pages available to content ratings managers and administrators. Results pages display data by menu item, content item or URL.

PeopleSoft Interaction Hub includes a pre-configured content ratings poll named CONTENTRATINGS. This poll asks the user to rate the effectiveness of a page on a scale of one to five, with one being the low rating.

---

**Important!** You can customize the text of the CONTENTRATINGS poll's title or question, but you should not change the poll ID or the answer configuration.

---

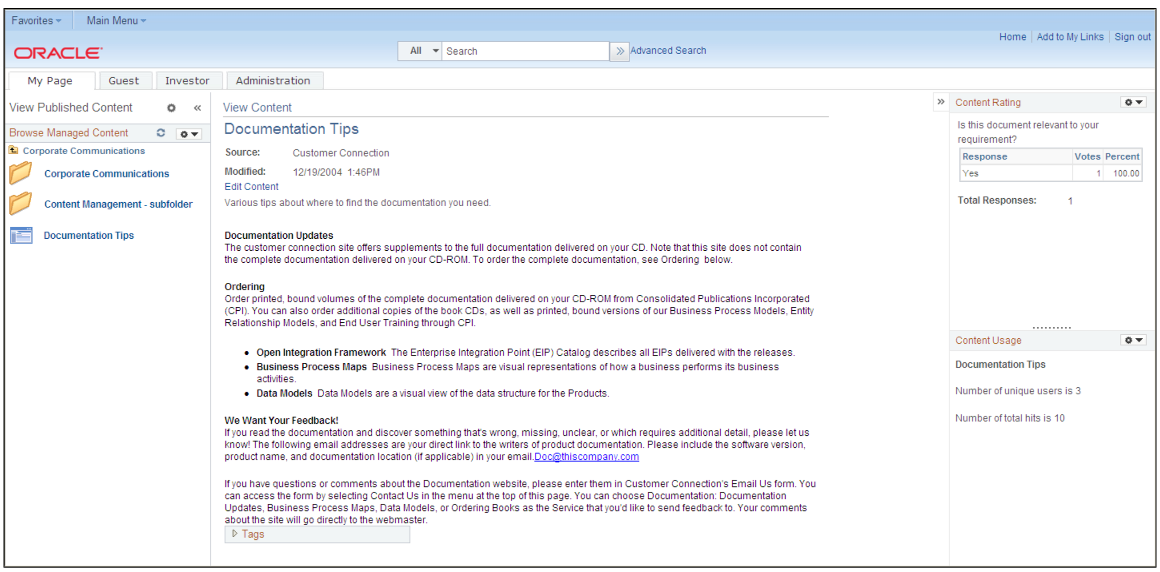
## Content Ratings for Managed Content

Content ratings are available for items of managed content only when content is displayed in the content WorkCenter—that is, when the content in a WorkCenter option is enabled on the Installation Options page. When this option is enabled, the content WorkCenter includes the Content Rating pagelet in a related content frame. The default poll for the Content Rating pagelet is also defined on the Installation Options page. However, content ratings administrators can use the Managed Content page documented in this topic to override the default poll for individual items of managed content.

The following illustrates content displayed in the content WorkCenter with responses to the default poll in the Content Rating pagelet:

**Image: Content WorkCenter displaying the Content Rating pagelet**

This example illustrates the Content WorkCenter displaying the Content Rating pagelet.




See "Defining Installation Options" (PeopleSoft Interaction Hub 9.1: Portal and Site Administration).

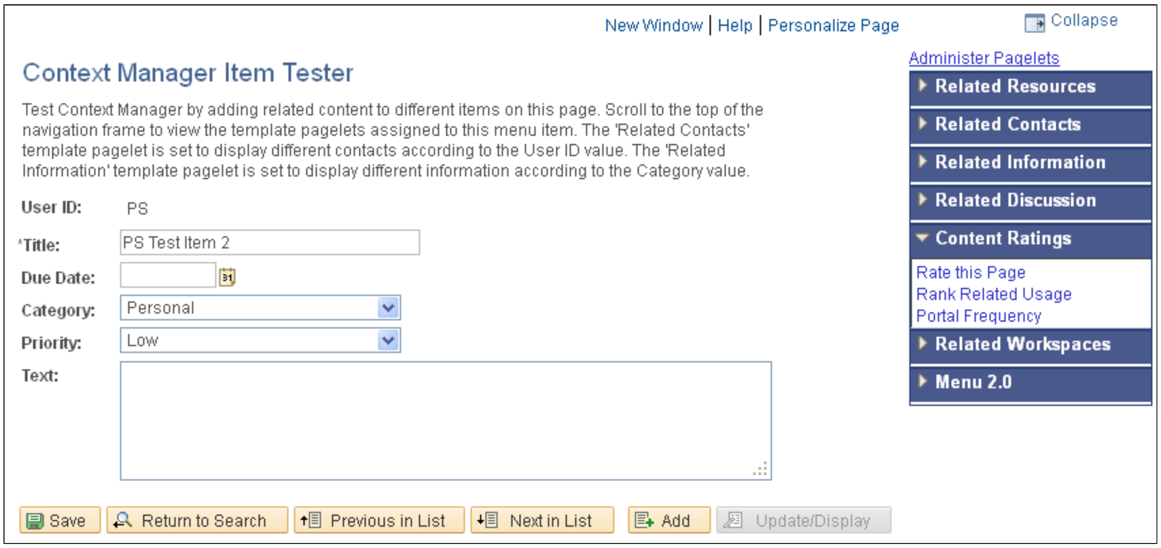
## Content Ratings for Menu Items

Content ratings for menu items (also referred to as content references) are configured through PeopleSoft Interaction Hub's Context Manager framework. You must assign the Content Ratings template pagelet to the menu item within Context Manager. In addition, you must assign one or more polls to the menu item on the Menu Items page discussed in this topic.

When users access a page that is being polled, the Content Ratings pagelet containing a link to the poll is displayed in the Context Manager frame. When the user clicks the poll link, the content ratings question appears in a new browser window. A user can answer each content ratings question only once for any given menu item or URL. However, if the poll is deployed to many different content items, the user can answer it again for each different menu item.

**Image: Context Manager frame with the Content Ratings pagelet**

The following example illustrates the Context Manager frame with the Content Ratings pagelet.




See Understanding Context Manager.

## Understanding Usage Tracking (iTracker)

iTracker is an invisible tracking system that can monitor the pages (also referred to as content references or menu items) that a user accesses. In addition, iTracker can be deployed to track users' access to blog posts, discussion posts, and all content management system items. An iScript stores the user ID, object ID, and date and time information each time that a tracked item is accessed.

For menu items including portal content available through unified navigation, iTracker stores the PORTALCONTENTURL parameters, which is the portal URL less any parameter values. For unregistered URL tracking, iTracker uses the PORTALACTUALURL parameter value, which is the portal URL plus any parameter values. However, if the PORTALACTUALURL parameter value exceeds 254 characters in length, the system will use the PORTALCONTENTURL parameter.

---

**Important!** iTracker tracks usage only when users access menu items via the drop-down menu. Access to menu items via other mechanisms such as menu pagelets, navigation collections, DFAN pages, and so on does not produce iTracker usage data.

---

For menu items, iTracker data is stored in the PS_EO_PE_SR_ITRACK table. The results are available through the Usage Results by Menu Item page.Two queries also provide iTracker results: EO_PE_SR_TRKCONTHITS_QRY (returns the number of hits for a specific item) and EO_PE_SR_TRKCONTUSRS_QRY (returns the number of unique users who accessed that item).

You assign menu items or unregistered URLs to the iTracker in the same way that you specify which content you want to associate with standard content ratings polls.

For blog posts, discussion posts, and content management system items, iTracker data is stored in the PS_EO_PE_SR_OBJTRK table. Two queries provide iTracker results: EO_PE_SR_TRKCONTHITS_QRY (returns the number of hits for a specific item) and

EO_PE_SR_TRKCONTUSRS_QRY (returns the number of unique users who accessed that item). These results are also available when the EO_PE_SR_ITRK_SBP subpage is added to the component that is used to display these items. In addition, when content has been configured to be displayed in the content WorkCenter template, usage tracking is provided in the related content frame.

See "Configuring Content Display in a WorkCenter" (PeopleSoft Interaction Hub 9.1: Content Management System)

# Managing Content Ratings

This topic discusses managing content ratings.

## Pages Used to Manage Portal Content Ratings

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| Content Ratings Page | EO_PE_SR_SRV_SELCT | Define high-level information, such as the poll ID and description. Add, edit, and delete poll questions. |
| Content Ratings – Question Details Page | EO_PE_SR_SRV_CONFG | Enter a poll question and possible responses. |
| Maintain Content Ratings – Menu Items Page | EO_PE_SR_CONTENT | Assign a menu item to the poll ID. |
| Maintain Content Ratings – Managed Content Page | EO_PE_SR_SRV_CM | Assign a piece of managed content to the poll ID. |
| Maintain Content Ratings – Result Viewers Page | EO_PE_SR_SRV_USERS | Grant user access to results for the poll ID. Access is granted to the View Results page. |
| Advanced Page | EO_PE_SR_ADVANCED | Assign an unregistered URL to the poll ID. This page is intended for advanced users with an understanding of portal-hosted URL formats. |

## Understanding Management of Content Ratings

Access to the delivered content ratings configuration pages is granted by role. Content ratings managers can access the Content Ratings page, Menu Items page and Managed Content page. The Result Viewers page and Advanced page can only be accessed by content ratings administrators as usage of these pages require a more technical understanding of portal operations.

## Content Ratings Page

Use the Maintain Content Ratings – Content Ratings page (EO_PE_SR_SRV_SELCT) to define high-level information, such as the poll ID and description.

Add, edit, and delete poll questions.

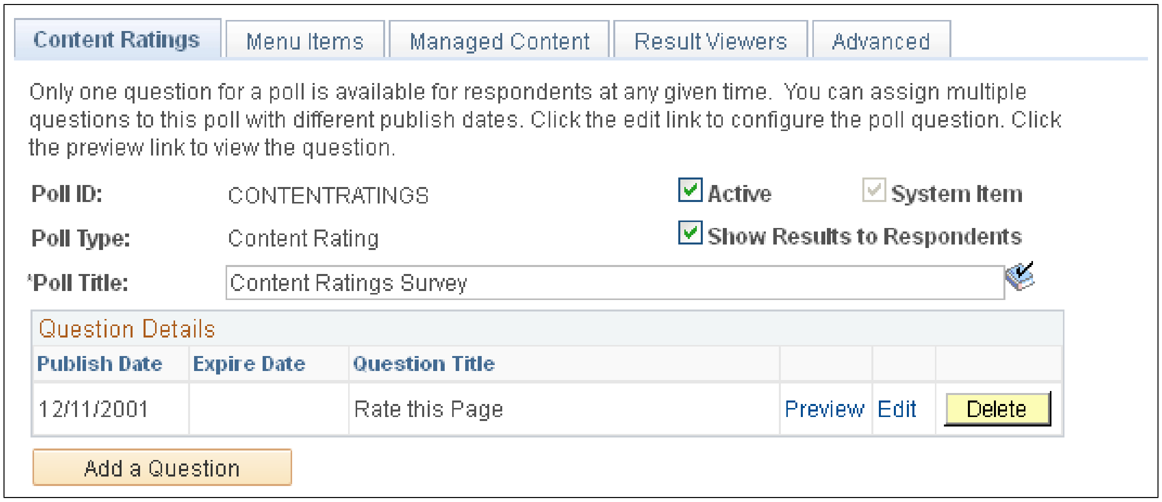
 

**Navigation**

Portal Administration, Context, Content Ratings, Maintain Content Ratings

**Image: Maintain Content Ratings – Content Ratings page**

This example illustrates the fields and controls on the Maintain Content Ratings – Content Ratings page. You can find definitions for the fields and controls later on this page.




**Poll ID** Displays the identifier for the poll.

**Poll Type** Displays the default value of *Content Rating.*

**Active** Select the check box to make the poll active on the Content Ratings pagelet. The poll will not be available on the Content Ratings pagelet unless this box is selected.

**Show Results to Respondents** Select to enable respondents to view the poll results when they have completed the poll and each subsequent time they access the poll's menu item or URL.

**Description** Enter a description of the poll.

## Question Details

**Publish Date** Displays the publish date entered on the Question Details page.

**Expire Date** The value that appears is based on the publication date of subsequent questions. The current question is retired when the next question is published.

**Question Title** Displays the value entered on the Question Details page. This value will appear as a link on the Content Ratings pagelet.

**Preview** Click to display the poll in a new browser window. A preview is available once information on the Question Details page has been completed and saved for the associated question.

**Edit** Click to access the Question Details page, where you can edit the associated question.

**Delete** Click to delete the associated question. You will be prompted to confirm your deletion.

**Add a Question** Click to access the Question Details page, where you can enter a poll question.

**Delete this Poll** Click to delete the poll. You will be prompted to confirm the deletion.

## Content Ratings – Question Details Page

Use the Question Details page (EPPSP_CFG_QUEST) to enter a poll question and possible responses.

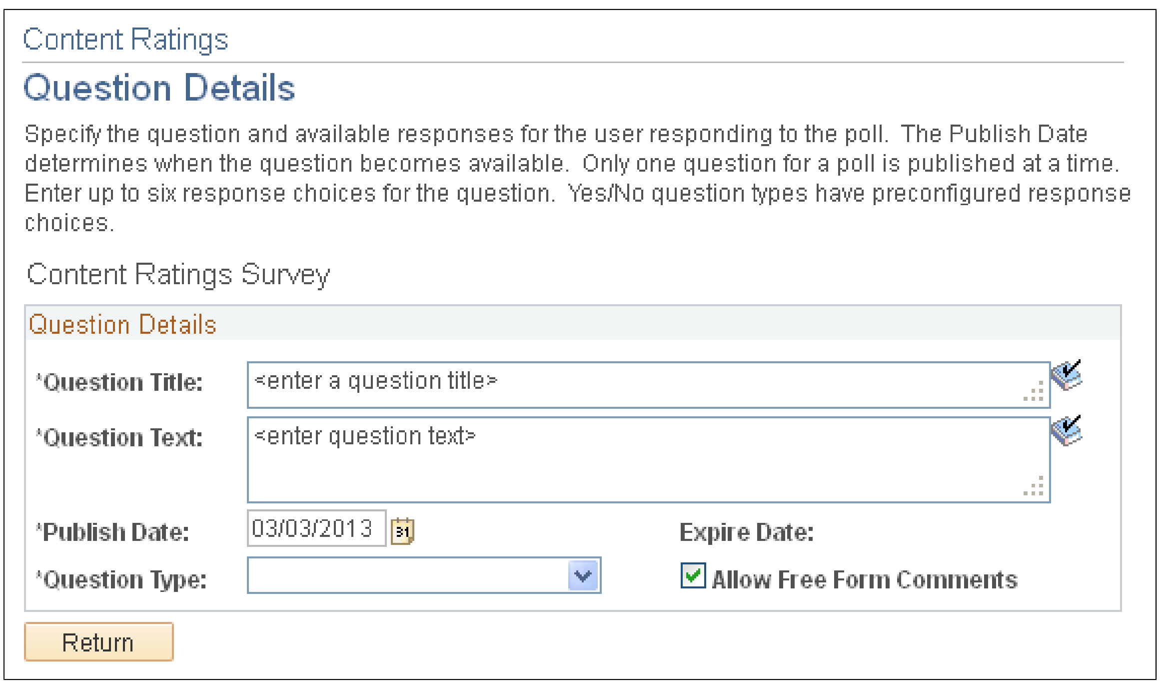
**Navigation**

Click the Add Question button on the Maintain Polls page.

Click the Properties button on the Maintain Polls page.

**Image: Content Ratings – Question Details page**

This example illustrates the fields and controls on the Content Reference – Question Details page. You can find definitions for the fields and controls later on this page.




## Maintain Content Ratings – Menu Items Page

Use the Maintain Content Ratings – Menu Items page (EO_PE_SR_CONTENT) to assign a menu item to the poll ID.

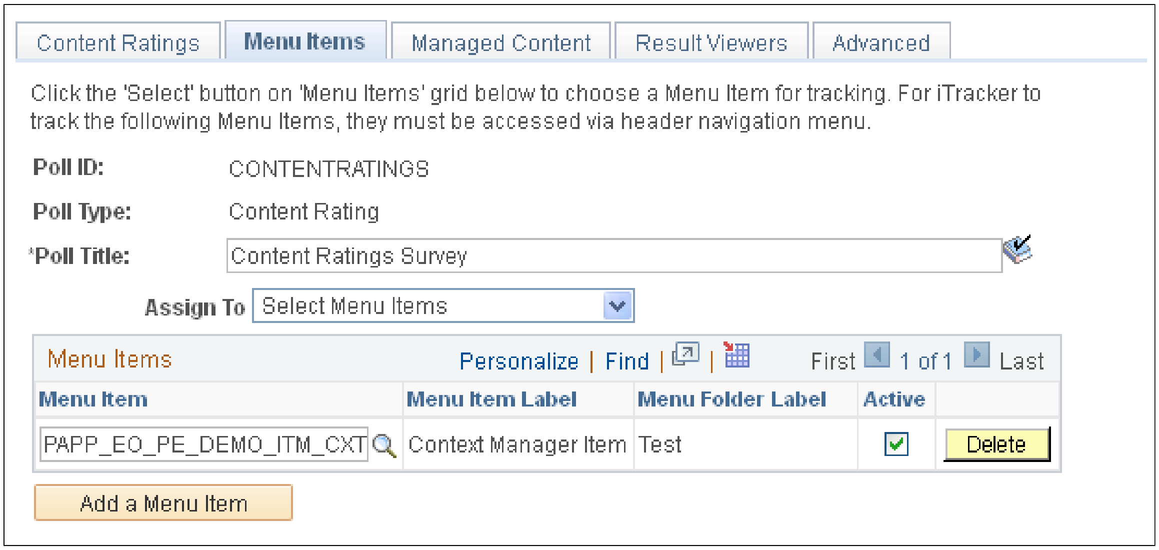
 

**Navigation**

Portal Administration, Context, Content Ratings, Maintain Content Ratings, Menu Items

**Image: Maintain Content Ratings – Menu Items page**

This example illustrates the fields and controls on the Maintain Content Ratings – Menu Items page. You can find definitions for the fields and controls later on this page.




---

**Important!** This assignment is site-specific and defaults to the site that you are logged onto. If the same menu item is in multiple sites, you will need to make the assignment for each instance.

---

**Assign To**

Select the from the following values:

*Select Menu Items.* Select to be able to specify the menu items with which you want to associate the poll. The Menu Items scroll area displays.

*All Menu Items.* Select to associate all menu items to the poll.

---

**Note:** You must also associate the menu item with Context Manager's dynamic content template plus the Content Ratings pagelet for the poll to appear on the Content Ratings pagelet for the menu item.

---

## Menu Items

The Menu Items grid displays when the Assign To field value is set to *Select Menu Items.*.

**Menu Item**

Select the menu item you want to associate with the survey poll.

**Menu Item Label**

The link text that will appear for the menu item in the portal menu.

**Menu Folder Label**

The text that identifies the menu folder.

**Active**
Select the control to activate the poll for the selected menu item. If cleared, the link to the poll will not display on the Content Ratings pagelet.

**Add Menu Item**
Click the control to add a new menu item to the page.

## Maintain Content Ratings – Managed Content Page

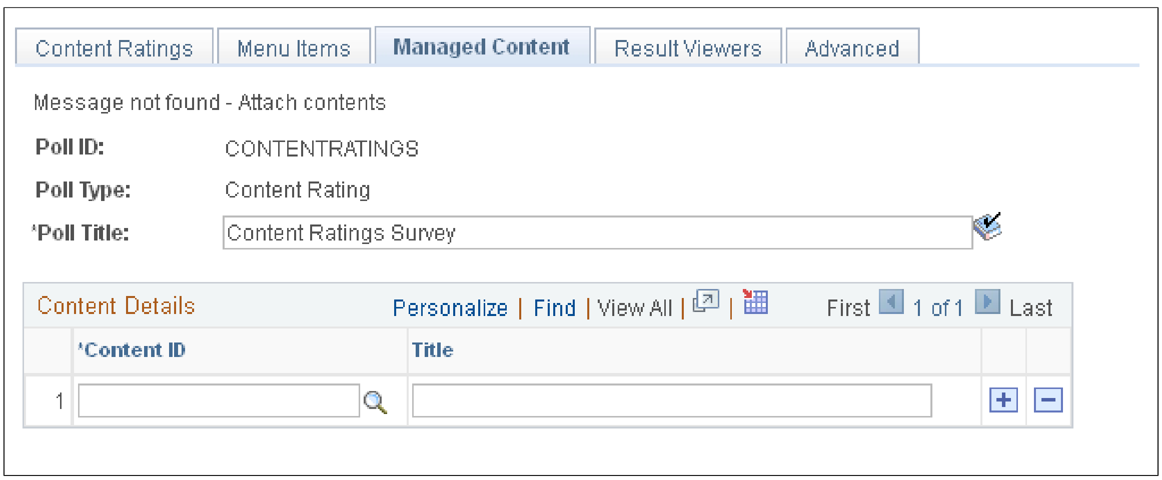
Use the Maintain Content Ratings – Managed Content page (EO_PE_SR_SRV_CM) to assign a piece of managed content to the poll ID.

**Navigation**

Portal Administration, Context, Content Ratings, Maintain Content Ratings, Managed Content

**Image: Maintain Content Ratings – Managed Content page**

This example illustrates the fields and controls on the Maintain Content Ratings – Managed Content page. You can find definitions for the fields and controls later on this page.




Use the Maintain Content Ratings – Managed Content page to override the default content ratings poll that is visible when content is displayed in the content WorkCenter template.

---

**Note:** The Maintain Content Ratings – Managed Content page is invisible and unavailable until the content in a WorkCenter option is enabled on the Installation Options page.

---

**Content ID**
Select the piece of managed content that will use this poll instead of the default content ratings poll.

**Title**
The title of the selected piece of managed content.

See "Defining Installation Options" (PeopleSoft Interaction Hub 9.1: Portal and Site Administration).

## Maintain Content Ratings – Result Viewers Page

Use the Maintain Content Ratings – Results Viewers page (EO_PE_SR_SRV_USERS) to grant user access to results for the poll ID.

Access is granted to the View Results page.

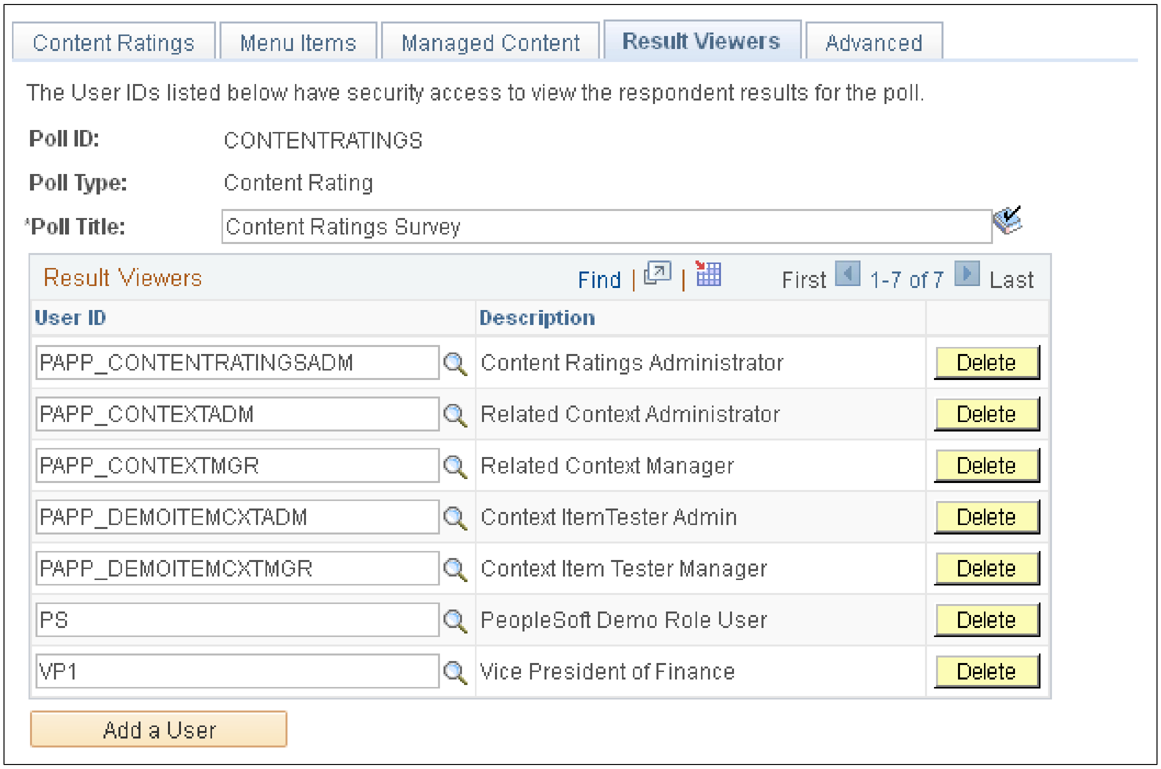
 

**Navigation**

Portal Administration, Context, Content Ratings, Maintain Content Ratings, Results Viewers

**Image: Maintain Content Ratings – Result Viewers page**

This example illustrates the fields and controls on the Maintain Content Ratings – Result Viewers page. You can find definitions for the fields and controls later on this page.




---

**Note:** If the selected poll appears for multiple menu items (CREFs), security access is granted to users to view the results for all instances. You are not granting CREF-specific access.

---

| | |
|---|---|
| **User ID** | Select the user you want to be able to view results for the selected poll.<br><br>**Note:** Selected user IDs must have security access to the View Content Ratings Results page and Usage Results by Menu Item pages in the portal registry. |
| **Add a User** | Click to add another user to the list of result viewers. |

See Viewing Content Ratings Results, Viewing iTracker Usage Results.

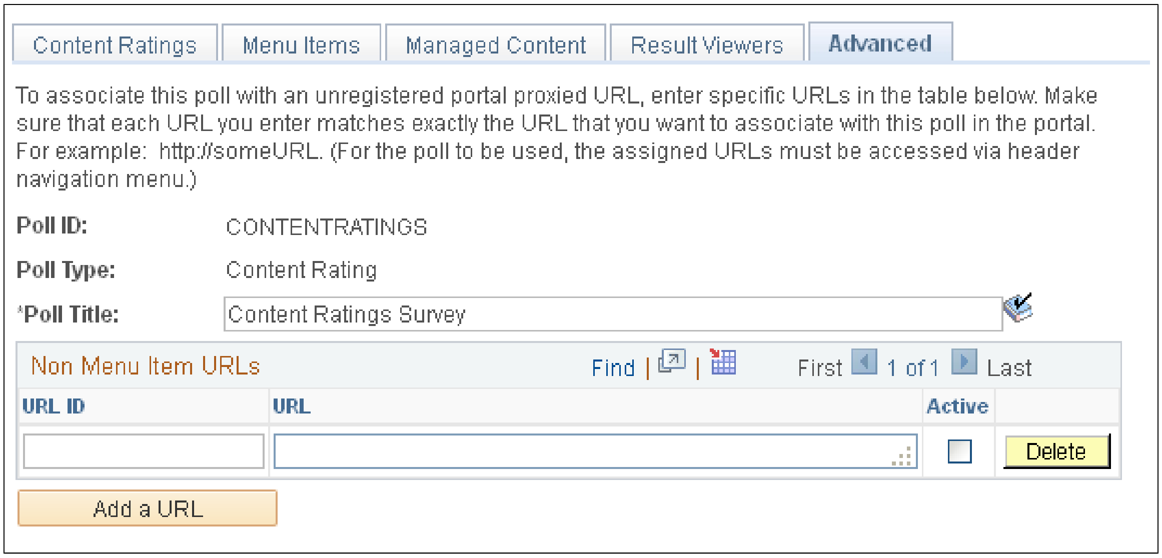
 

## Advanced Page

Access the Maintain Content Ratings – Advanced page (Portal Administration, Context, Content Ratings, Maintain Content Ratings, Advanced).

**Image: Maintain Content Ratings – Advanced page**

This example illustrates the fields and controls on the Maintain Content Ratings – Advanced page. You can find definitions for the fields and controls later on this page.




You can associate a poll with an unregistered portal-proxied URL. For example, you can register a pagelet or page that contains links to articles or documents, such as *External News,* that you do not want to register separately. Use this page to associate a content ratings poll with the news articles or documents that are linked to from the registered page.

---

**Note:** Polls can only be associated with the first link off of a registered page. Any links that are accessed off of the unregistered pages cannot be associated with polls.

---

**URL ID**

Enter the name that you want to use to identify the URL. This name should be unique for each URL ID entry.

**URL**

Enter the URL to which you want to deploy the poll.

Oracle recommends that you navigate to the URL in the browser and copy the URL in the address bar into this field. The system converts this entry to uppercase text and resolves any HTML codes to the actual characters they represent.

---

**Note:** The URL cannot be longer than 254 characters.

---

**Active**

Select to display the poll ID for the URL. If this option is clear, the user will not see the poll ID link when accessing the URL.

**Add a URL**

Click to enter an additional URL.

### Additional Conditions for Non-Menu Item URLs

For the poll to appear for a URL, the following conditions must be met:

- The portal must proxy the URL entered. As such, you must access the URL from a page or pagelet that is registered in the portal. For example, the URL could be to a news article referenced off of a portal home page.

  **Note:** The registered referring page on which the link to the unregistered URL appears should use an HTML template. If the referring page is a homepage pagelet, there are no special configuration considerations to take into account. If you are using a portal CREF as the referring page, make sure that the CREF has a template specified, and that it is an HTML template. If the survey does not appear on the URL when you access it, double-check to make sure that the referring CREF is not using the Context Manager template itself.

  See the product documentation for *PeopleTools: Portal Technology*, “Understanding Portal Technology,” Portal Servlets.

  See the product documentation for *PeopleTools: Portal Technology*, “Understanding Portal Technology,” Page-Based Template Proxying.

- The URLs to which you want to associate a poll must also use the dynamic content template to render the poll in the Context Manager frame. Since this is not a registered URL, you will need to specify that the dynamic content template is designated as the portal's default template. Making this setting change will have special implications for your portal installation.

See the product documentation for *PeopleTools: Portal Technology*, “Working with Portal Templates.”

# Viewing Content Ratings Results

This topic discusses viewing ratings results, responses, comments and results by menu item.

## Pages Used to View Content Ratings Results

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| Content Ratings Results | EO_PE_SR_SURVEY_VW | Access results of the active content ratings polls to which you have been granted access. Only users and roles that have been selected on the Result Viewers page for the poll ID can access information on this page.<br><br>Click the View Results link to access the Results by Menu Item page, where you can access poll results broken down by menu item. The View Results link does not display if there are no results to view. |

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| Results by Menu Item | EO_PE_SR_CRF_INQ | View results of the selected poll for both active and inactive menu items broken down by menu item.<br><br>Click the View Responses link to access the View Responses page, where you can view current responses for the selected menu item. The View Responses link does not display if there are no responses to view for the menu item. |
| View Responses | EO_PE_SR_VWRSLTS | View current responses for the selected menu item. Click the View Comments link to access the View Comments page, where you can view any comments entered for the selected response. If no comments are available, the View Comments link does not display. |
| View Comments | EO_PE_SR_VWCMTS | View all comments entered for the selected response. |

# Deploying iTracker

This section provides an overview and discusses how to:

- Assign iTracker to menu items.
- Enable iTracker for tracking other items.

## Understanding Deployment of iTracker

iTracker is the only invisible usage tracker poll allowed by the portal. You cannot manipulate poll details, however you can define where iTracker is deployed:

- iTracker can be configured to monitor usage of specific menu items (also known as content references), including remote menu items available through unified navigation.
- iTracker can be enabled to track usage of blog posts, discussion posts, and all content management system items.

## Assigning iTracker to Menu Items

To assign iTracker to track usage of menu items (also referred to as content references):

1. Access the Maintain Content Ratings – Content Ratings page (Portal Administration, Context, Content Ratings, Maintain Content Ratings).
2. Select the *ITRACKER* poll ID value.
3. Ensure that the Active option is selected for the iTracker poll. (This is the default value.)

---

**Note:** The Question Summary group box that displays on the page for content ratings poll IDs does not display because iTracker does not require the entry of any questions.

---

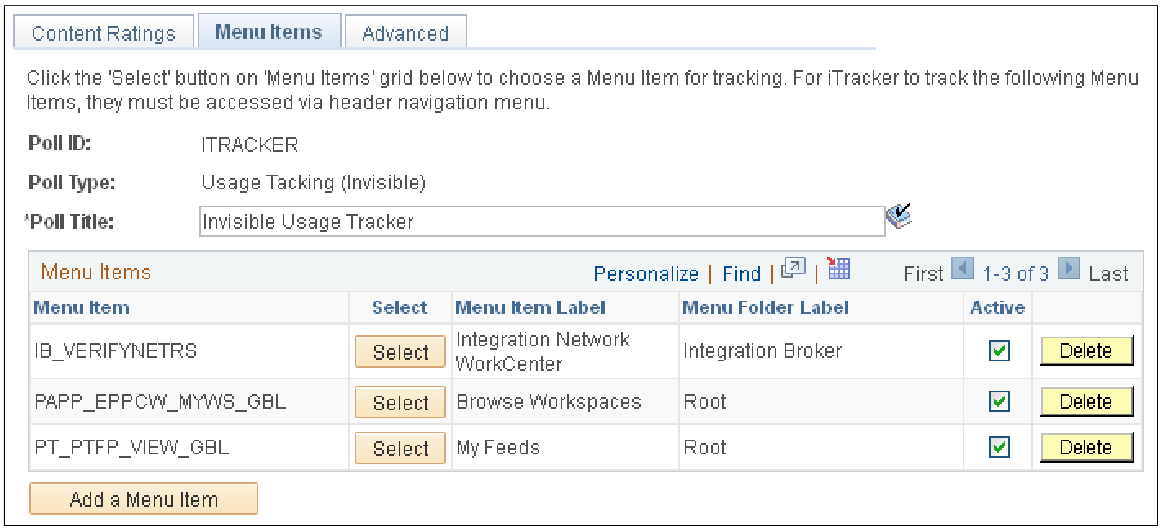
See Content Ratings Page.

4. Access the Menu Items page.

5. Click the Add a Menu Item button to add a menu item to track:

**Image: Maintain Content Ratings – Menu Items page**

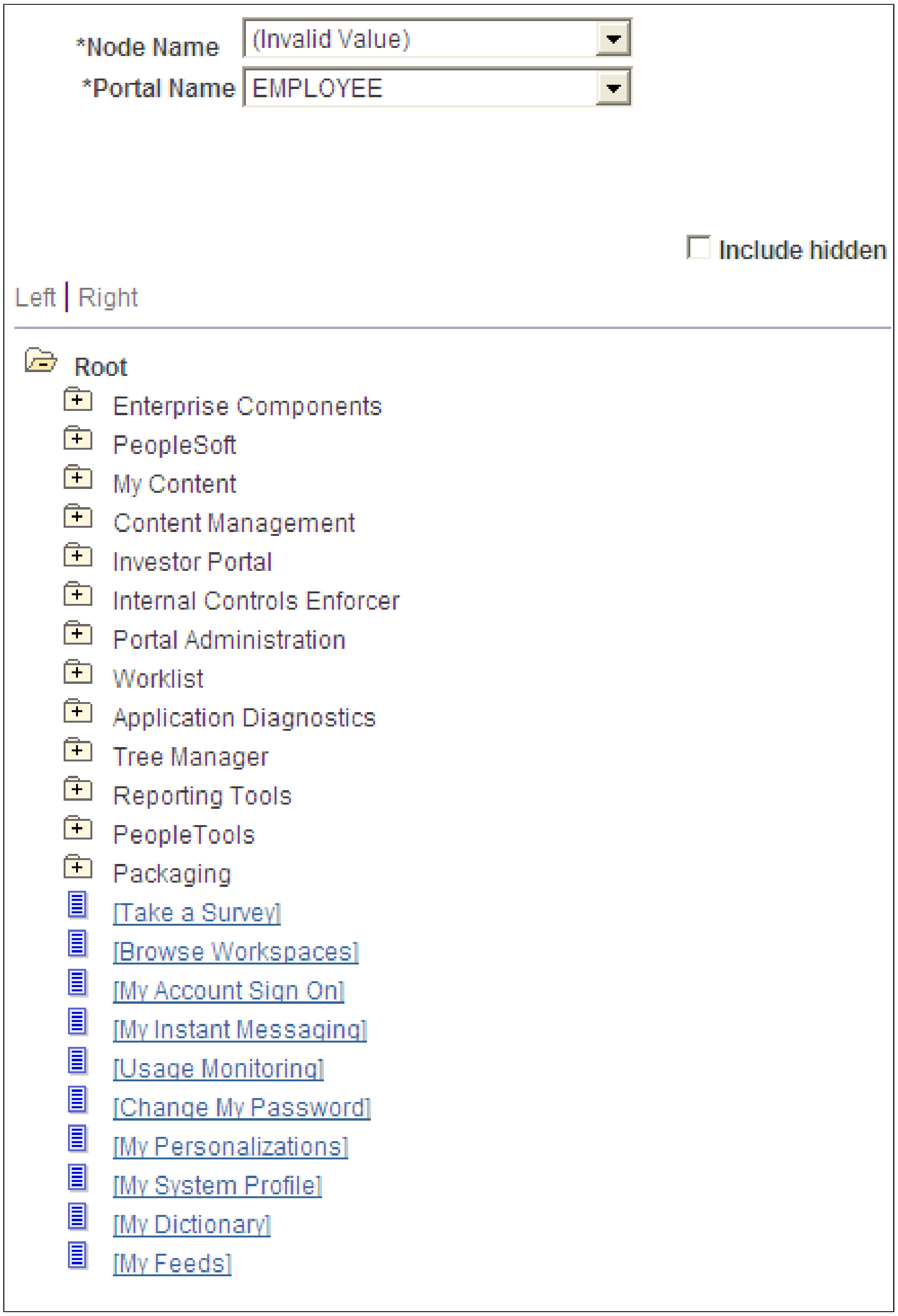
This example illustrates the fields and controls on the Maintain Content Ratings – Menu Items page. Use the page to add a menu item to track.



6. Click the Select button:

**Image: Select a Content Reference page**

This example illustrates the fields and controls on the Select a Content Reference page. Use the page to select the node, portal and menu item to add to the iTracker.




7. Select the node, portal, and any menu item registered in the portal including remote menu items available through unified navigation.

8. Ensure that the Active option is selected for each menu item that you wish to have tracked by iTracker. (The default is that this option is unselected.)

9. Optionally, access the Advanced page and assign iTracker to any unregistered portal-hosted URLs.

   See Advanced Page.

---

**Note:** The Result Viewers page that displays for content ratings poll IDs does not display for iTracker. To control access to iTracker results, limit access to the View Usage Tracker Results page to only appropriate user IDs and roles using PeopleTools security.

---

### Related Links

Viewing iTracker Usage Results

## Enabling iTracker for Tracking Other Items

To enable iTracker to track usage of blog posts, discussion posts, and all content management system items:

1. Access the Installation Options page (Portal Administration, System Data, Installation Options).
2. Select the iTracker option to enable content tracking.
3. Save your changes.

For blog posts, discussion posts, and content management system items, iTracker data is stored in the PS_EO_PE_SR_OBJTRK table. Two queries provide iTracker results: EO_PE_SR_TRKCONTHITS_QRY (returns the number of hits for a specific item) and EO_PE_SR_TRKCONTUSRS_QRY (returns the number of unique users who accessed that item). These results are also available when the EO_PE_SR_ITRK_SBP subpage is added to the component that is used to display these items. In addition, when content has been configured to be displayed in the content WorkCenter template, usage tracking is provided in the related content frame.

See "Defining Installation Options" (PeopleSoft Interaction Hub 9.1: Portal and Site Administration).

# Viewing iTracker Usage Results

This topic discuses how to view iTracker usage results.

## Page Used to View iTracker Usage Results

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| Usage Results by Menu Item Page | EO_PE_SR_USG_INQ | View a list of active menu items in iTracker and the total number of visits and unique visitors for each menu item. |

## Usage Results by Menu Item Page

Use the Usage Results by Menu Item page (EO_PE_SR_USG_INQ) to view a list of active menu items in iTracker and the total number of visits and unique visitors for each menu item.

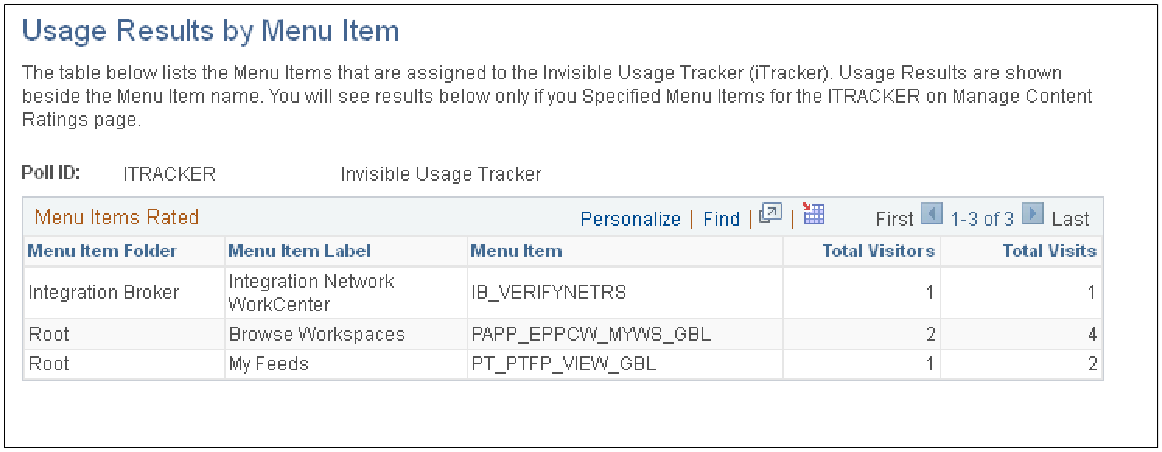
 

**Navigation**

Portal Administration, Context, Content Ratings, Usage Tracker Results

**Image: Usage Results by Menu Item Page**

This example illustrates the fields and controls on the Usage Results by Menu Item Page. You can find definitions for the fields and controls later on this page.


Usage Results by Menu Item

The table below lists the Menu Items that are assigned to the Invisible Usage Tracker (iTracker). Usage Results are shown beside the Menu Item name. You will see results below only if you Specified Menu Items for the ITRACKER on Manage Content Ratings page.

Poll ID: ITRACKER Invisible Usage Tracker

Menu Items Rated Personalize | Find | First 1-3 of 3 Last

| Menu Item Folder | Menu Item Label | Menu Item | Total Visitors | Total Visits |
|---|---|---|---|---|
| Integration Broker | Integration Network WorkCenter | IB_VERIFYNETRS | 1 | 1 |
| Root | Browse Workspaces | PAPP_EPPCW_MYWS_GBL | 2 | 4 |
| Root | My Feeds | PT_PTFP_VIEW_GBL | 1 | 2 |

| | |
|---|---|
| **Menu Item Folder** | Displays the name of the menu folder that contains this menu item. |
| **Menu Item Label** | Displays the name of the menu item. |
| **Menu Item** | Displays the ID for the menu item. |
| **Total Visitors** | Displays the number of unique visitors to each menu item. |
| **Total Visits** | Displays the total number of visits to each menu item. |

**Important!** iTracker tracks usage only when users access menu items via the drop-down menu. Access to menu items via other mechanisms such as menu pagelets, navigation collections, DFAN pages, and so on does not produce iTracker usage data.

# Deleting iTracker Usage Results

This section discuses how to delete iTracker usage results.

## Page Used to Delete iTracker Usage Results

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| Delete Usage Tracker Results Page | EO_PE_SR_DELTRKDTA | View a list of active menu items in iTracker and the total number of visits and visitors to each. |

## Delete Usage Tracker Results Page

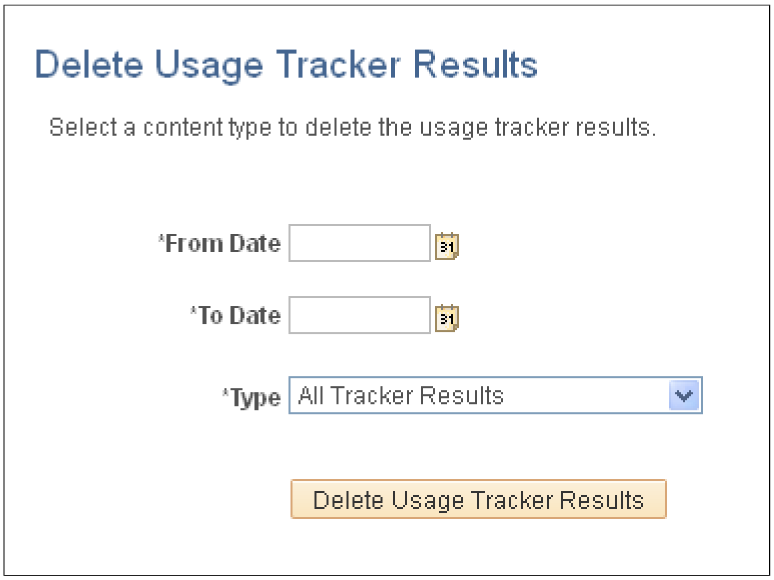
Use the Delete Usage Tracker Results page (EO_PE_SR_DELTRKDTA) to view a list of active menu items in iTracker and the total number of visits and visitors to each.

**Navigation**

Portal Administration, Context, Content Ratings, Delete Usage Tracker Results

**Image: Deleting Usage Tracker Results Page**

This example illustrates the fields and controls on the Deleting Usage Tracker Results Page. You can find definitions for the fields and controls later on this page.




| | |
|---|---|
| **From Date** | Enter a starting date for the data to be deleted. |
| **To Date** | Enter an end date for the data to be deleted. |
| **Type** | Select the type of iTracker data to be deleted:<br>• All iTracker data.<br>• Blog post data only.<br>• Content management system data only.<br>• Content reference data only.<br>• Discussion forum post data only. |
| **Delete Usage Tracker Results** | Click to delete the data.<br><br>**Note:** There is no confirmation that the deletion occurred. |

Chapter 20

# Understanding PeopleSoft Interaction Hub-Delivered Related Content Services

## PeopleTools Related Content Framework

The PeopleSoft 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.*

Related content services provide immediate access to relevant, contextual information for any activity without requiring additional actions by users. The PeopleSoft Related Content Framework acts as an enterprise mashup, tying together all types of content such as PeopleSoft Interaction Hub-related content services, Oracle Business Intelligence Enterprise Edition (OBIEE) analytics, queries, and any relevant non-PeopleSoft data into a single location: PeopleSoft application pages.

The terms *related content* and *related content service* are synonymous. Related content can be any collaborative, analytical, or informational content that is useful for performing a business process. A related content service is content, such as a discussion forum or a tagging capability, that is offered as a service to be consumed by other applications. You can configure related content within the same database, among multiple PeopleSoft databases, and between a PeopleSoft application page and non-PeopleSoft data.

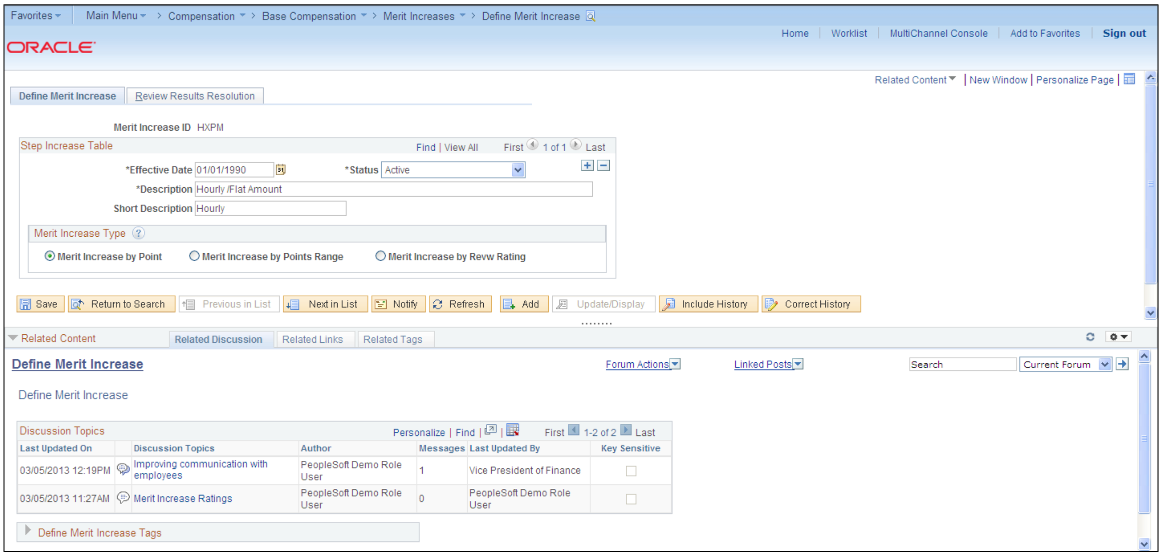
When users access application pages that are configured with related content, that content appears in the related content frame at the bottom of the application page. You can assign multiple services to entire components, individual pages in a component, or a combination of the two. If an application page has multiple services, each service appears as a tab in the related content frame. In addition to the related content frame at the bottom of the page, a Related Content drop-down list box appears in the navigation bar at the top of pages that are configured with related content services.

The following example shows the Define Merit Increases page from PeopleSoft HCM with a related content frame. The frame has three tabs, one for each of the PeopleSoft Interaction Hub related content services: Related Discussion, Related Tags, and Related Links.

**Image: Define Merit Increases page with the Related Discussion service in the Related Content frame**

The following example illustrates the Define Merit Increases page from PeopleSoft HCM with the Related Discussion service in the Related Content frame.



For more information on the PeopleSoft Related Content Framework, see *PeopleTools: Portal Technology*, "Developing and Configuring Related Content Services."

# Delivered Related Content Services

PeopleTools also provides service definitions for the PeopleSoft Interaction Hub related content services. This section discusses the:

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

These related content services provide PeopleSoft Interaction Hub features on PeopleSoft application pages. While the service definitions are provided in PeopleTools, an installed and configured PeopleSoft Interaction Hub database is required to store and service the service data.

## Related Discussion Service

Using the Related Discussion related content service, you can collaborate to share critical data about a transaction or a transaction instance. Similar to standalone forums in the Oracle PeopleSoft Interaction Hub, forums in the Related Discussion service also 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. Discussion forums enable multiple affected individuals to contribute to the review and resolution of a question.

See Understanding the Related Discussion Service

## Related Links Service

The Related Links related content service enables you to associate links and add file attachments to relevant information for the current transaction instance or for all instances in a transaction. These links are available to all users of the transaction, and they provide easy access to information that is relevant to executing the process. Users can link to content residing in PeopleSoft Interaction Hub (blogs, discussions, or collaborative workspaces) or external URLs. In addition, the Related Links service enables users to create a new workspace and to link that workspace to a transaction.

SeeUnderstanding the Related Links Service

## Related Tags Service

The Related Tags related content service enables you to create user-specified tags for a current transaction instance. You can characterize and bookmark these transactional or business objects with terminology of your choosing, providing easy access as well as collaborative classification of the transaction.

See Understanding the Related Tags Service.

## Chapter 21

# Setting Up Related Content Services

## Understanding the Setup of Related Content Services

PeopleTools is delivered with three PeopleSoft Interaction Hub related content services for use with PeopleSoft application systems:

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

Each of these services provides features native to PeopleSoft Interaction Hub for use on PeopleSoft application transaction pages. In a multi-system setup such as this, PeopleSoft Interaction Hub is known as the *producer* because it provides services, and the PeopleSoft application system is known as the *consumer*.

For users to access a related content services on a transaction page, you must complete the following setup:

1. Configure Integration Broker on the producer and consumer systems to support inter-operation of the two systems.
2. Assign a related content service to a transaction page.
3. Map fields and select the security model for the specified service.

The remainder of this topic provides details for completing the setup for delivered related content services.

## Managing Delivered Related Content Services

This topic discusses managing delivered related content services.

### Pages Used to Manage Delivered Related Content Services

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| Define Related Content Service Page | PTCSSERVICES | Create or review the definition for a related content service. |

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| Manage Related Content Configuration | PTCS_SRVCFG_SRCH | Review which content references have related content services assigned.<br><br>See Assigning a Related Content Service to a Transaction Page. |
| Select a Content Reference | PTCS_CRFURL_SELECT | Select the content reference to which to assign related content services.<br><br>See Assigning a Related Content Service to a Transaction Page. |
| Configure Service Page (Related Discussion Service) | PTCS_SVCCFGCRC_SEC | Map system variables, component and page values, and transaction keys to service parameters, which differentiate one transaction instance from another. Select the security mode for the service. |

## Configuring Integration Broker for Related Content Services

You must configure Integration Broker for inter-operation of a PeopleSoft application system as a consumer of services produced by the PeopleSoft Interaction Hub system.

To configure Integration Broker for related content services:

1. Configure single signon (SSO) between the default local node of the PeopleSoft Interaction Hub system (PSFT_PA) and the default local node of the consuming system. These steps are facilitated by setting up unified navigation:

   a. See "Completing Initial System Configuration" (PeopleSoft Interaction Hub 9.1: Portal and Site Administration).

   b. See "Configuring the Integration Gateway" (PeopleSoft Interaction Hub 9.1: Portal and Site Administration).

   c. See "Setting Up Single Signon" (PeopleSoft Interaction Hub 9.1: Portal and Site Administration).

   d. See "Unified Navigation Node Network Page" (PeopleSoft Interaction Hub 9.1: Portal and Site Administration).

   **Note:** While adding a remote folder to the drop-down menu can facilitate the set up of these related content services, it is not a required step.

2. On the PeopleSoft Interaction hub system, ensure that the PTCS_GETACCESS service operation has the following routings:

   - Inbound: any-to-local.
   - Inbound: local-to-local.
   - Outbound: local-to- the default local node for each consumer system.

See the product documentation for *PeopleTools: Integration Broker*, “Managing Service Operation Routing Definitions.”

3. Copy user profile definitions so that data is synchronized between the two systems.

   See the product documentation for *PeopleTools: Security Administration*, “Working with User Profiles Across Multiple PeopleSoft Databases.”

## Define Related Content Service Page

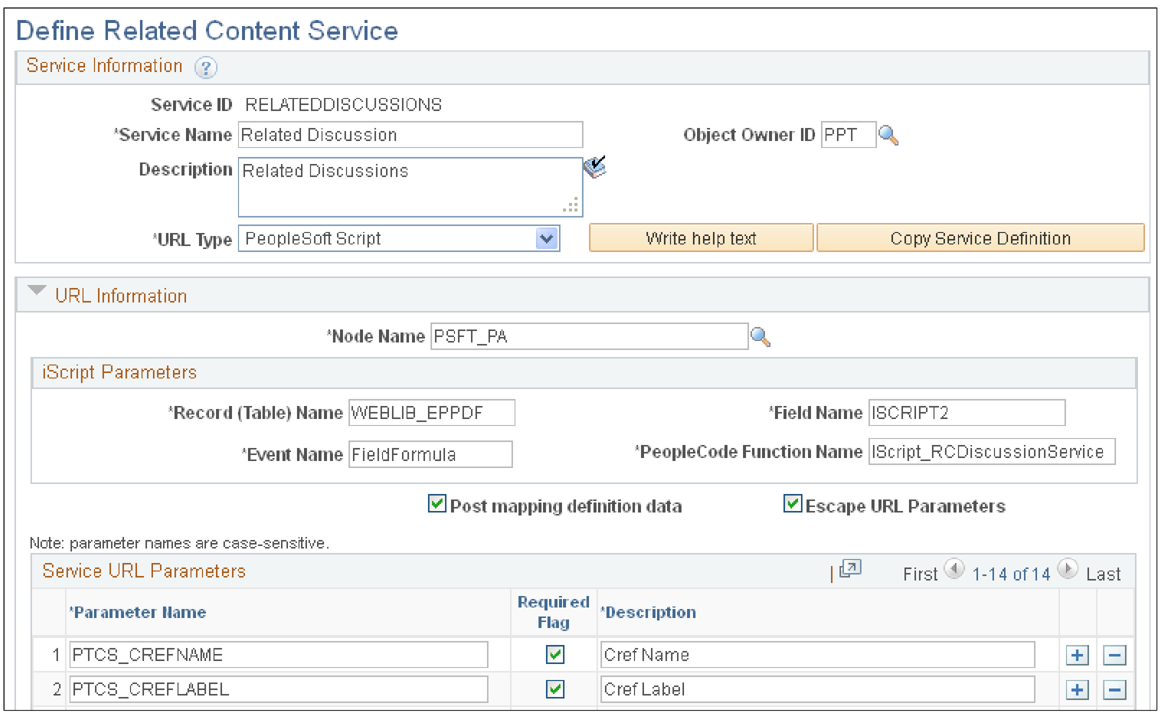
Use the Define Related Content Service page (PTCSSERVICES) to create or review the definition for a related content service.

**Navigation**

- PeopleTools, Portal, Related Content Service, Define Related Content Service
- On the Manage Related Content Service page, click the Create a New Related Content Service link.

**Image: Define Related Content Service page (Related Discussion service definition)**

This example illustrates a portion of the Define Related Content Service page for a Related Discussion service definition.




Use the Define Related Content Service page to review related content service definitions delivered for PeopleSoft Interaction Hub or to create your own service definitions.

The three delivered related content service definitions use *PSFT_PA* as the node, which is the name of the default local node on the PeopleSoft Interaction Hub system. If your PeopleSoft Interaction Hub system uses a different default local node, then change the Node Name field in each service definition. You can also use a PeopleSoft Interaction Hub system portal host node, such as *EMPL,* instead.

**Important!** To ensure that the related content services operate as delivered, do not change any other values on the Define Related Content Service page.

PeopleTools PeopleBooks provide more information about the Define Related Content Service page, including how to create a service definition.

See the product documentation for *PeopleTools: Portal Technology*, “Developing and Configuring Related Content Services,” Defining Related Content Services.

## Assigning a Related Content Service to a Transaction Page

1. Select PeopleTools, Portal, Related Content Service, Manage Related Content Service.

   The Manage Related Content Configuration page appears.

2. Click the Assign Related Content to Application Pages link.

   The Select a Content Reference page appears.

3. Navigate through the tree hierarchy of content references.
4. Select the content reference to which to assign related content services.

   The Assign Related Content page appears.

5. Select and assign a related content service by service ID.

See the product documentation for *PeopleTools: Portal Technology*, “Developing and Configuring Related Content Services,”Assigning and Managing Related Content Services, Assigning Page-Level Services to Content References.

## Configure Service Page (Related Discussion Service)

Use the Configure Service page (PTCS_SVCCFGCRC_SEC) to map system variables, component and page values, and transaction keys to service parameters, which differentiate one transaction instance from another.

Select the security mode for the service.

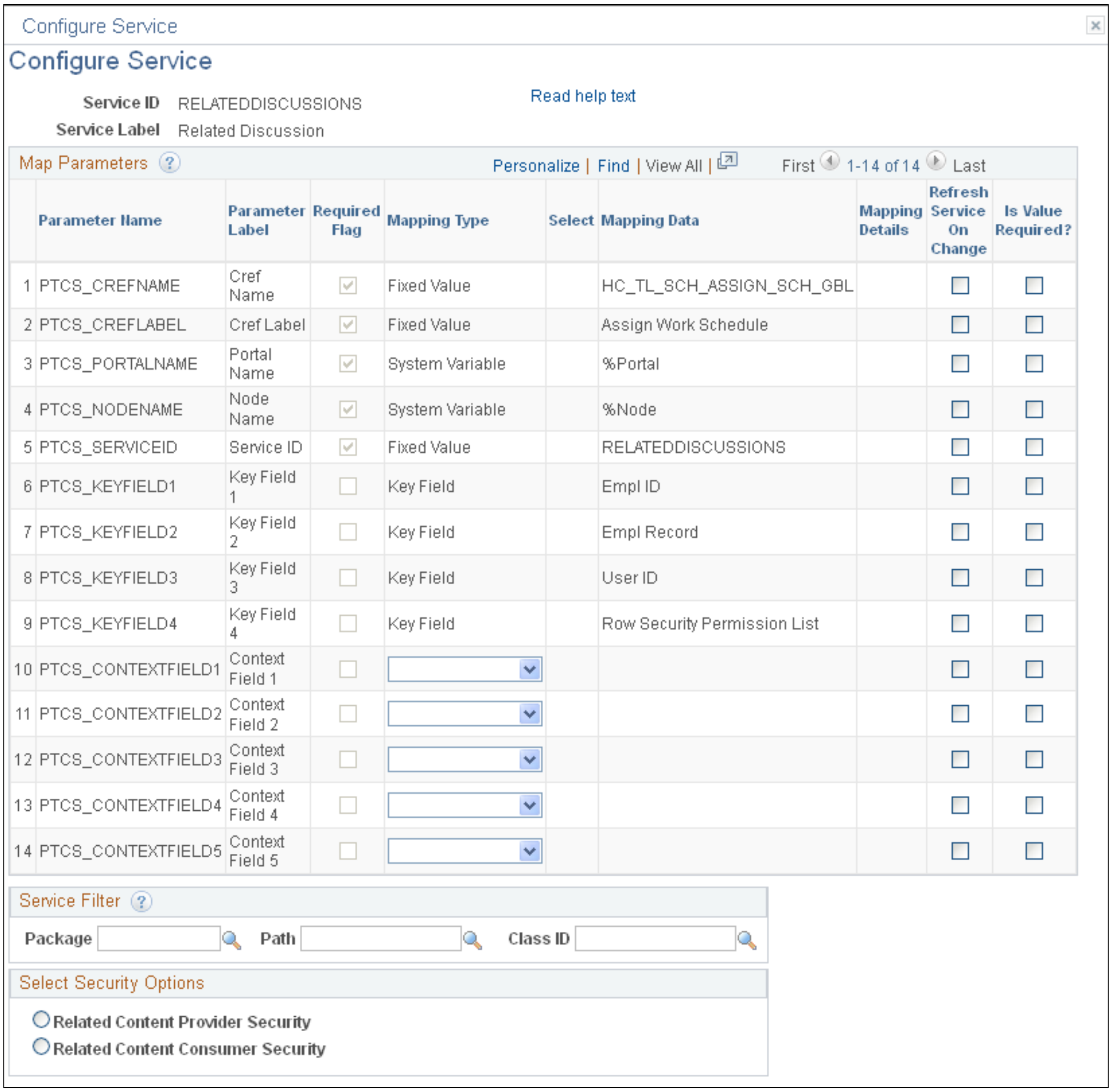
 

### Navigation

On the Assign Related Content page, click the Configure button for a service.

### Image: Configure Service page (Related Discussion service)

This example illustrates the fields and controls on the Configure Service page for a Related Discussion service.



Configure Service

Configure Service

Service ID RELATEDDISCUSSIONS

Service Label Related Discussion

Read help text

Map Parameters

Personalize | Find | View All | First 1-14 of 14 Last

| | Parameter Name | Parameter Label | Required Flag | Mapping Type | Select | Mapping Data | Mapping Details | Refresh Service On Change | Is Value Required? |
|---|---|---|---|---|---|---|---|---|---|
| 1 | PTCS_CREFNAME | Cref Name | ☑ | Fixed Value | | HC_TL_SCH_ASSIGN_SCH_GBL | | ☐ | ☐ |
| 2 | PTCS_CREFLABEL | Cref Label | ☑ | Fixed Value | | Assign Work Schedule | | ☐ | ☐ |
| 3 | PTCS_PORTALNAME | Portal Name | ☑ | System Variable | | %Portal | | ☐ | ☐ |
| 4 | PTCS_NODENAME | Node Name | ☑ | System Variable | | %Node | | ☐ | ☐ |
| 5 | PTCS_SERVICEID | Service ID | ☑ | Fixed Value | | RELATEDDISCUSSIONS | | ☐ | ☐ |
| 6 | PTCS_KEYFIELD1 | Key Field 1 | ☐ | Key Field | | Empl ID | | ☐ | ☐ |
| 7 | PTCS_KEYFIELD2 | Key Field 2 | ☐ | Key Field | | Empl Record | | ☐ | ☐ |
| 8 | PTCS_KEYFIELD3 | Key Field 3 | ☐ | Key Field | | User ID | | ☐ | ☐ |
| 9 | PTCS_KEYFIELD4 | Key Field 4 | ☐ | Key Field | | Row Security Permission List | | ☐ | ☐ |
| 10 | PTCS_CONTEXTFIELD1 | Context Field 1 | ☐ | | | | | ☐ | ☐ |
| 11 | PTCS_CONTEXTFIELD2 | Context Field 2 | ☐ | | | | | ☐ | ☐ |
| 12 | PTCS_CONTEXTFIELD3 | Context Field 3 | ☐ | | | | | ☐ | ☐ |
| 13 | PTCS_CONTEXTFIELD4 | Context Field 4 | ☐ | | | | | ☐ | ☐ |
| 14 | PTCS_CONTEXTFIELD5 | Context Field 5 | ☐ | | | | | ☐ | ☐ |

Service Filter

Package Path Class ID

Select Security Options

Related Content Provider Security

Related Content Consumer Security

Use the Configure Service page to review the mapping of system variables, component and page values, and transaction keys to service parameters. Also use this page to select the security mode for the service.

The key field parameters map to the transaction keys and are used to differentiate one transaction instance from another. These fields are populated automatically with the keys defined for the transaction. You should accept all the default parameter values as populated by the system.

1. If the service was assigned at the page level rather than at the component level and if additional context information is desired for contextual searches, then map context fields to page fields or key fields so that each post stores additional contextual information related to the transaction instance. This additional context information is then searchable and can be displayed in the search results.

See Participating in Discussion Forums in the Related Discussion Service.

2. Optionally, enter a package, path, and class ID to define a service filter.

---

**Note:** A service filter hides or displays a service link in a field-level menu or the Related Content menu based on the value in the field at runtime. The application package PeopleCode that you specify can access the component buffer using field values to trigger data-specific logic that causes the related content service link to be visible or hidden based on the value of the field. The filter enables the context of the data to determine whether the service link appears.

---

See the product documentation for *PeopleTools: Portal Technology*, "Developing and Configuring Related Content Services," Assigning and Managing Related Content Services, Understanding Service Configuration.

3. Select one of the following security modes:

   - Select the *Related Content Provider Security* option to use the security model of the PeopleSoft Interaction Hub discussion forums. The forum moderator is responsible for adding members and privileges for access to the forum. The first user to access the transaction after the service has been assigned creates the forum by default and becomes the forum moderator.

     In addition, the system adds a discussion administrator role as a forum moderator and a discussion contributor role as a forum contributor. The default values for these roles (PAPP_DISCUSSIONS_ADMIN and PAPP_DISCUSSIONS_CONTRIBUTOR, respectively) are defined as installation options on the Portal and Security Defaults page.

     See "Portal and Security Defaults Page" (PeopleSoft Interaction Hub 9.1: Portal and Site Administration).

   - Select the *Related Content Consumer Security* option to use the security model of the transaction.

     Then, on the Authorization Configuration page, assign an application class that will provide the security handler for this component or page. If an application class is not assigned, then the basic PeopleTools transaction security model (user-role-permission list) will be used.

     See the product documentation for *PeopleTools: Portal Technology*, "Using Web Services for Object and Row-Level Data Authorization," Configuring Content References and Components to Use the Security Authorization Service.

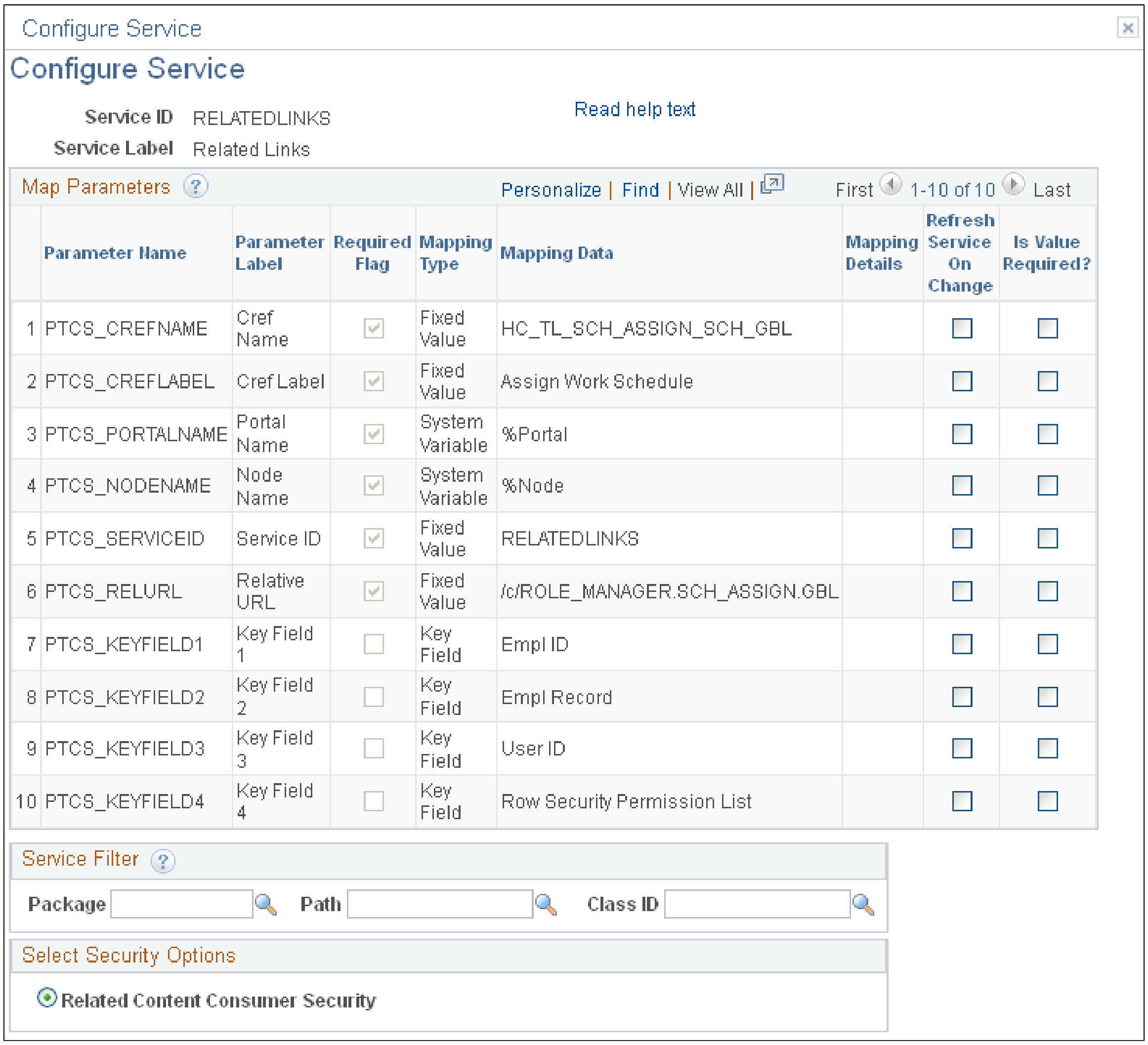
 

## Configure Service Page (Related Links Service)

Access the Configure Service Page (click the Configure button for the Related Links service on the Assign Related Content page).

**Image: Configure Service page (Related Links service)**

This example illustrates the fields and controls on the Configure Service page for a Related Links service.



Configure Service

Configure Service

Service ID RELATEDLINKS

Service Label Related Links

Read help text

Map Parameters

Personalize | Find | View All | First 1-10 of 10 Last

| | Parameter Name | Parameter Label | Required Flag | Mapping Type | Mapping Data | Mapping Details | Refresh Service On Change | Is Value Required? |
|---|---|---|---|---|---|---|---|---|
| 1 | PTCS_CREFNAME | Cref Name | ✓ | Fixed Value | HC_TL_SCH_ASSIGN_SCH_GBL | | | |
| 2 | PTCS_CREFLABEL | Cref Label | ✓ | Fixed Value | Assign Work Schedule | | | |
| 3 | PTCS_PORTALNAME | Portal Name | ✓ | System Variable | %Portal | | | |
| 4 | PTCS_NODENAME | Node Name | ✓ | System Variable | %Node | | | |
| 5 | PTCS_SERVICEID | Service ID | ✓ | Fixed Value | RELATEDLINKS | | | |
| 6 | PTCS_RELURL | Relative URL | ✓ | Fixed Value | /c/ROLE_MANAGER.SCH_ASSIGN.GBL | | | |
| 7 | PTCS_KEYFIELD1 | Key Field 1 | | Key Field | Empl ID | | | |
| 8 | PTCS_KEYFIELD2 | Key Field 2 | | Key Field | Empl Record | | | |
| 9 | PTCS_KEYFIELD3 | Key Field 3 | | Key Field | User ID | | | |
| 10 | PTCS_KEYFIELD4 | Key Field 4 | | Key Field | Row Security Permission List | | | |

Service Filter

Package Path Class ID

Select Security Options

Related Content Consumer Security

Use the Configure Service page to review the mapping of system variables, component and page values, and transaction keys to service parameters. Also use this page to select the security mode for the service.

The key field parameters map to the transaction keys and are used to differentiate one transaction instance from another. These fields are populated automatically with the keys defined for the transaction. You should accept all default parameter values as populated by the system.

---

**Important!** You must not modify the automatically populated key fields because the Related Links service uses these key fields to create a link to the transaction instance.

---

1. Identify the storage location for attachments in the Attachment Location field as a URL identifier. Select one of the following mapping types:

---

**Important!** Do not select the mapping type of *Key Field* or *System Variable* for the attachment location.

---

- *Fixed Value:* Enter a valid URL identifier as defined in the PeopleSoft Interaction Hub database.
- *No item selected:* The default value of `EPPRS_ATTACHDB` is used.

See “Storage Locations and URL Identifiers” for more information on defining and using URL identifiers.

2. Optionally, enter a package, path, and class ID to define a service filter.

---

**Note:** A service filter hides or displays a service link in a field-level menu or the Related Content menu based on the value in the field at runtime. The application package PeopleCode that you specify can access the component buffer using field values to trigger data-specific logic that causes the related content service link to be visible or hidden based on the value of the field. The filter enables the context of the data to determine whether the service link appears.

---

See the product documentation for *PeopleTools: Portal Technology*, “Developing and Configuring Related Content Services,” Assigning and Managing Related Content Services, Understanding Service Configuration.

3. Select the *Related Content Consumer Security* option to use the security model of the transaction.

Then, on the Authorization Configuration page, assign an application class that will provide the security handler for this component or page. If an application class is not assigned, then the basic PeopleTools transaction security model (user-role-permission list) will be used.

See the product documentation for *PeopleTools: Security Administration*, “Using Web Services for Object and Row-Level Data Authorization,” Configuring Content References and Components to Use the Security Authorization Service.

## Storage Locations and URL Identifiers

The PeopleSoft Interaction Hub database is delivered with two URL identifiers defined for your use with file attachments for the Related Links service:

- `EPPRS_ATTACHDB` — Identifies the EPPRS_ATTACHDB record definition and corresponding database table as the file attachment storage location. This is the default storage location if no location is specified.
- `EPPRS_ATTACHFS` — Identifies a file repository as the file attachment storage location. This file repository can be of any type supported by PeopleTools including FTP, FTPS, SFTP, HTTP, or HTTPS.

---

**Important!** If you specify `EPPRS_ATTACHFS` as the storage location, then you *must* complete the definition of the URL identifier including the full URL and required URL properties.
In addition, configure permissions on the file server to prohibit unauthorized direct access to files stored on the server.

---

As delivered, there are no restrictions on the file types that can be uploaded or downloaded as file attachments. If you wish to restrict the file types, these can be specified in the FILE_EXT_LIST URL property.

In addition to the two delivered URL identifiers, you can create and use your own URL identifiers. Any such URL identifier must be defined in the PeopleSoft Interaction Hub database.

See the product documentation for *PeopleTools: System and Server Administration*, "Using PeopleTools Utilities," Using Administration Utilities, URL Maintenance.

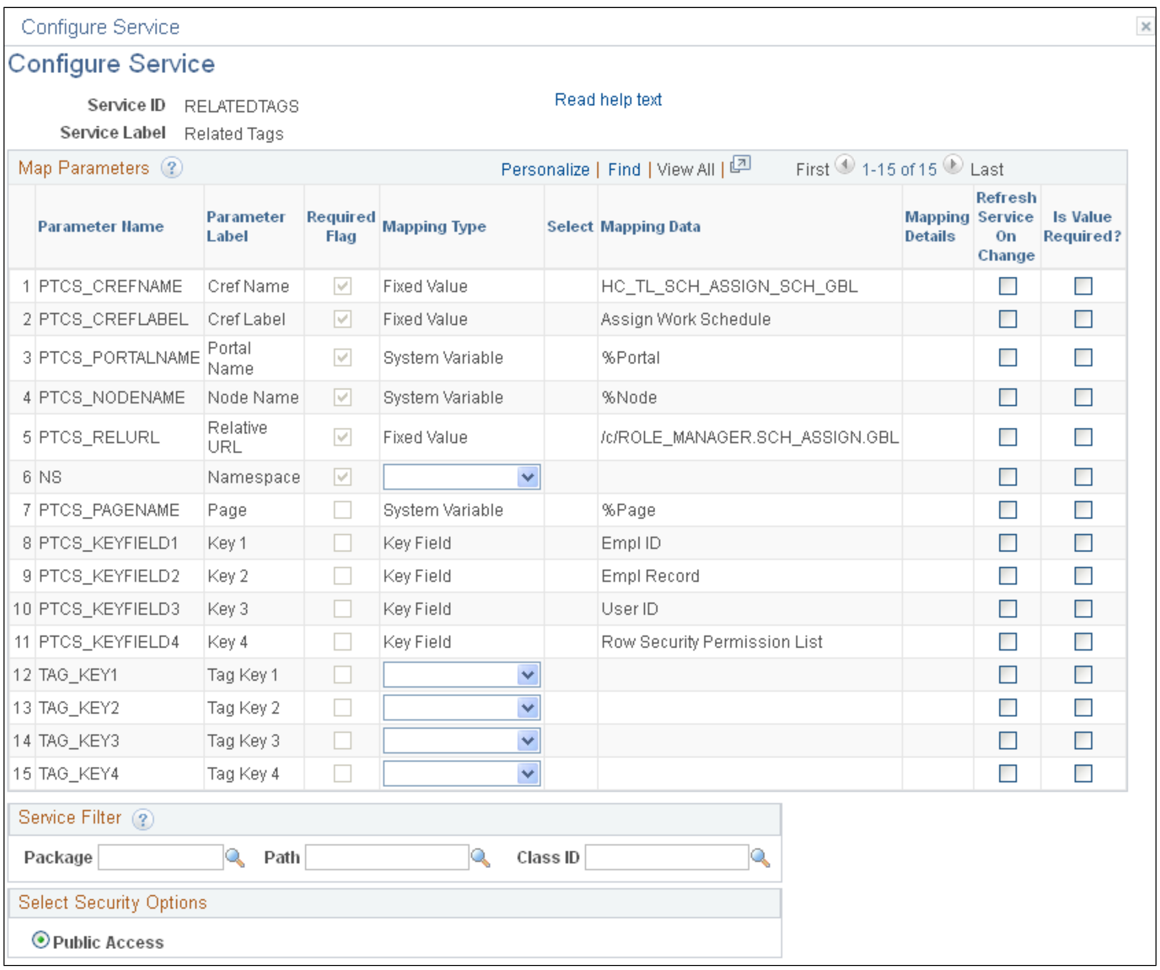
See the product documentation for *PeopleTools: PeopleCode Developer's Guide*, "Working With File Attachments," Understanding the File Attachment Functions, Understanding File Attachment Storage Locations.

## Configure Service Page (Related Tags Service)

Access the Configure Service page (click the Configure button for the Related Tags service on the Assign Related Content page).

**Image: Configure Service page (Related Tags service)**

This example illustrates the fields and controls on the Configure Service page for a Related Tags service.




Use the Configure Service page to review the mapping of system variables, component and page values, and transaction keys to service parameters. Also use this page to select the security mode for the service.

The key field parameters map to the transaction keys and are used to differentiate one transaction instance from another. These fields are populated automatically with the keys defined for the transaction. You should accept all default parameter values as populated by the system.

1. For the Namespace parameter, select *Fixed Value*, and then:

   **Important!** The namespace parameter value must be 20 characters or less.

   - To create a shared tag namespace for more than one instance of the Related Tags service, set the Namespace parameter to a fixed value and use the same name for each instance. For example, for all pages related to vendor information, the tag namespace could be named: *VENDOR_TAGS.*

     Each instance must also share the same Tag Key values.

   - To create a unique tag namespace for each instance of the Related Tags service, set the Namespace parameter to a fixed value and use a unique name for each instance, for example, use a derivative of the CREF name such as *VNDR_ID_TAGS.*

2. Optionally, enter a package, path, and class ID to define a service filter.

   **Note:** A service filter hides or displays a service link in a field-level menu or the Related Content menu based on the value in the field at runtime. The application package PeopleCode that you specify can access the component buffer using field values to trigger data-specific logic that causes the related content service link to be visible or hidden based on the value of the field. The filter enables the context of the data to determine whether the service link appears.

   See the product documentation for *PeopleTools: Portal Technology*, “Developing and Configuring Related Content Services,” Assigning and Managing Related Content Services, Understanding Service Configuration.

3. Select the *Public Access* security mode.

   Select public access to make the Related Content visible to anyone who accesses the transaction page.

## Assigning Discussion Forum Roles to Transaction Users

To assign discussion forum roles to transaction users:

1. In the PeopleSoft application system, make note of the users who have access to each transaction that has been assigned the Related Discussions service.

2. Determine which users require moderator privileges and which require contributor privileges.

3. In the PeopleSoft Interaction Hub system, assign the discussion administrator role to the user IDs identified as forum moderators.

4. In the PeopleSoft Interaction Hub system, assign the discussion contributor role to the user IDs identified as contributors.

The default values for these roles (PAPP_DISCUSSIONS_ADMIN and PAPP_DISCUSSIONS_CONTRIBUTOR, respectively) are defined as installation options on the Portal and Security Defaults page.

See "Portal and Security Defaults Page" (PeopleSoft Interaction Hub 9.1: Portal and Site Administration).

## Chapter 22

# Working With the Related Discussion Service

## Understanding the Related Discussion Service

Using the Related Discussion related content service, you can collaborate to share critical data about a transaction or a transaction instance. Similar to standalone forums in Oracle's PeopleSoft Interaction Hub, forums in the Related Discussion service also 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. Discussion forums enable multiple relevant individuals to contribute to the review and resolution of a question.

For example, on a purchase requisition process page, you can discuss all vendors or a specific vendor. In this example, the vendor name or ID could serve as the context of the discussion, meaning that as the you navigate to other POs raised to that vendor, all the discussions pertinent to the vendor can be discovered through a search. The discussion postings can also be discovered through search whenever you choose to create a new requisition for this specific vendor. In this example, the information helps buyers benefit from the collective intelligence gathered on this vendor—in the context of the business process—when and where they need it the most.

## Managing Discussion Forums in the Related Discussion Service

This topic discusses managing a discussion forum, assigning participants and privileges to them and creating discussion forum policy statement.

### Pages Used to Manage Discussion Forums in the Related Discussion Service

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| Forum Privileges Page | EPPDF_FORUM_PRIV | Assign discussion forum participants for the Related Discussion service by user or role. Assign privileges to the participants. |
| Manage Forum Page | EPPDF_FORUM_MANAGE | View the properties for a Related Discussion service discussion forum. |
| Forum Policy Page | EPPDF_FORUM_POLICY | Enter a policy statement for the Related Discussion service discussion forum. |
| Managing Linked Posts | EPPDF_LINKEDPOSTS | Access or delete linked posts. |

## Understanding the Creation of Discussion Forums in the Related Discussion Service

Depending on the security model, discussion forums in the Related Discussion service are created in different manners with different moderators:

- Related content security — The first user to access the transaction after the service has been assigned creates the forum by default and becomes the forum moderator. In addition, the PAPP_DISCUSSIONS_ADMIN role is added as a forum moderator, and the PAPP_DISCUSSIONS_CONTRIBUTOR role is added as a forum contributor.

  After the default user and roles are created, the forum moderator is responsible for adding additional members and privileges for access to the forum.

- Transaction security — The first user to access the transaction after the service has been assigned creates the forum by default and becomes the forum moderator. In addition, the PAPP_DISCUSSIONS_ADMIN role is added as a forum moderator, and the PAPP_DISCUSSIONS_CONTRIBUTOR role is added as a forum contributor.

  If the PeopleToolsTransactionSecurity application class is used to provide the transaction security via the user-role-permission list model, then no additional members need to be added to the forum. All other users who have been granted access to the component via a permission list get access to the discussion forum as a contributor.

## Forum Privileges Page

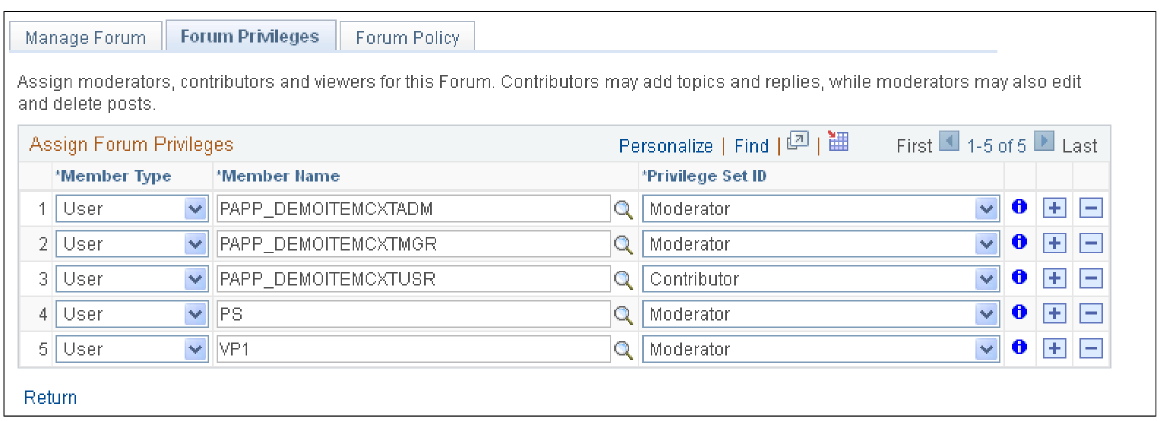
Use the Forum Privileges page (EPPDF_FORUM_PRIV) to assign discussion forum participants for the Related Discussion service by user or role.

**Navigation**

In the Related Discussion service, select Forum Actions, Manage Forum.

**Image: Forum Privileges page (Related Discussion service)**

This example illustrates the fields and controls on the Forum Privileges page (Related Discussion service). You can find definitions for the fields and controls later on this page.




Use the Forum Privileges page to ssign discussion forum participants for the Related Discussion service by user or role. When the forum is created, three members are added automatically:

- PAPP_DISCUSSIONS_ADMIN as a moderator by role.
- PAPP_DISCUSSIONS_CONTRIBUTOR as a contributor by role.
- The user who first accessed the forum as a moderator by user ID.

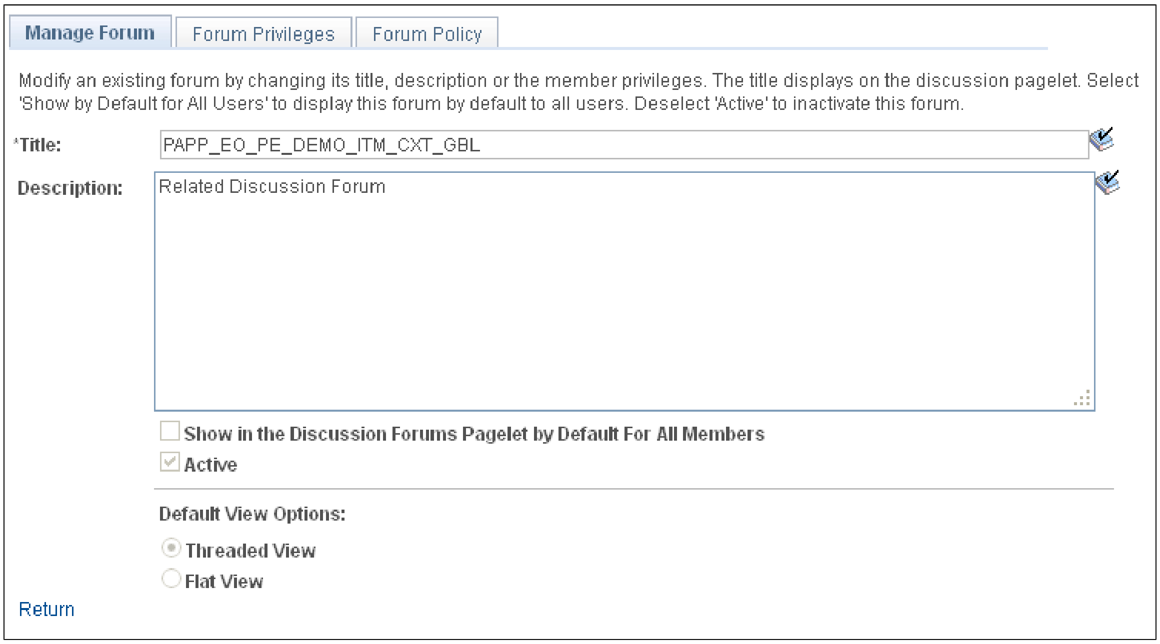
| | |
|---|---|
| **Member Type** | Select the type of participant you want to add to the discussion forum:<br><br>*Role* — Select to add forum participants by role.<br><br>See the product documentation for *PeopleTools: Security Administration*, “Setting Up Roles.”<br><br>*User* Select to add forum participants by user ID.<br><br>See the product documentation for *PeopleTools: Security Administration*, “Administering User Profiles.” |
| **Member Name** | Select the role or user ID. |
| **Privilege Set ID** | Select the privilege level you want to assign to the member:<br><br>*Moderator*<br><br>*Contributor*<br><br>**Note:** At a minimum, every discussion forum requires a moderator.<br><br>**Note:** The viewer privilege is not valid for related discussion forums.<br><br>See Understanding Discussion Forum Privileges. |
| **Close Window** | Click this link to close the Discussion Forum window. |

## Manage Forum Page

Access the Manage Forum page (on the Forum Privileges page, select the Manage Forum page).

**Image: Managing a Discussion Forum page**

This example illustrates the fields and controls on the Managing a Discussion Forum page. You can find definitions for the fields and controls later on this page.




Use the Manage Forum page to view the properties for a Related Discussion service discussion forum. You cannot change properties once a forum has been created.

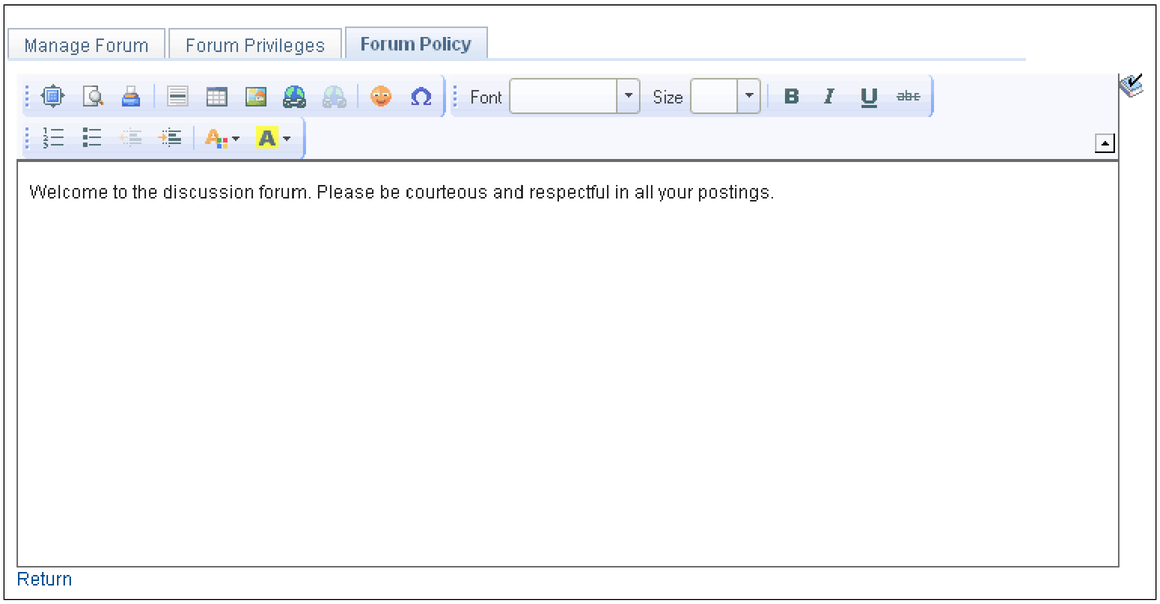
| | |
|---|---|
| **Title** | Enter a title for the discussion forum. This text appears on the Discussion Forums pagelet as the link to access the discussion forum. |
| **Description** | Enter a description of the goal of the discussion forum. This text appears on the Discussion Forums pagelet as hover text for the link used to access the discussion forum. |
| **Close Window** | Click this link to close the Discussion Forum window. |

## Forum Policy Page

Access the Forum Policy Page (select Forum Policy on the Forum Privileges page).

**Image: Forum Policy page (Related Discussion service)**

This example illustrates the fields and controls on the Forum Policy page (Related Discussion service). You can find definitions for the fields and controls later on this page.




Use the rich text editor to enter any policies that apply to the discussion forum.

**Close Window** Click this link to close the Discussion Forum window.

## Managing Linked Posts

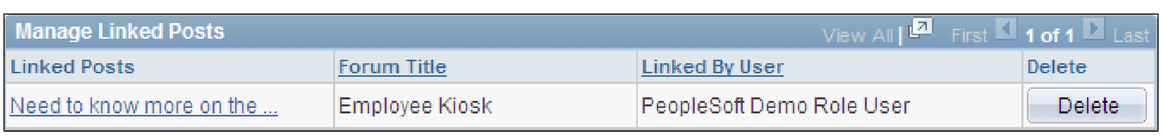
Use the Manage Linked Posts page (EPPDF_LINKEDPOSTS) to access or delete linked posts.

**Navigation**

In the Related Discussion service, select Linked Posts, Manage Linked Posts.

**Image: Manage Linked Posts page**

This example illustrates the fields and controls on the Manage Linked Posts page. You can find definitions for the fields and controls later on this page.



Manage Linked Posts — View All | First 1 of 1 Last

| Linked Posts | Forum Title | Linked By User | Delete |
|---|---|---|---|
| Need to know more on the ... | Employee Kiosk | PeopleSoft Demo Role User | Delete |

Use the Manage Linked Posts page to access or delete linked posts.

**Linked Posts** Click a linked post to open that discussion forum and post in the related content frame.

| | |
|---|---|
| **Delete** | Click the Delete button to delete a linked post. |

# Participating in Discussion Forums in the Related Discussion Service

This topic discusses ways to manage discussion posts.

## Pages Used to Participate in Discussion Forums in the Related Discussion Service

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| <Discussion Forum> Homepage | EPPDF_FORUM | View all forum topics and access features for participating in the forum. |
| Create New Topic | EPPDF_REPLY_TOPIC | Add a discussion topic to a discussion forum.<br><br>See Adding or Editing Discussion Posts. |
| Add a Reply | EPPDF_REPLY_TOPIC | Add a reply to a discussion post (topic or reply).<br><br>The fields on this page are the same as those on the Create New Topic page.<br><br>See Adding or Editing Discussion Posts. |
| Discussion | EPPDF_REPLY_TOPIC | Edit a discussion post (topic or reply).<br><br>The fields on this page are the same as those on the Create New Topic page.<br><br>See Adding or Editing Discussion Posts. |
| Post Details Page | EPPDF_VIEW_TOPIC | View details about a discussion post ( topic or reply). |
| Search Results Page | EPPDF_RCSEARCH | Review search results and link to discussion posts. |
| Forum Policy Page | EPPDF_VIEW_POLICY | View the policy for the discussion forum. |

## <Discussion Forum> Homepage

To access a discussion forum in the Related Discussion service, do one of the following:

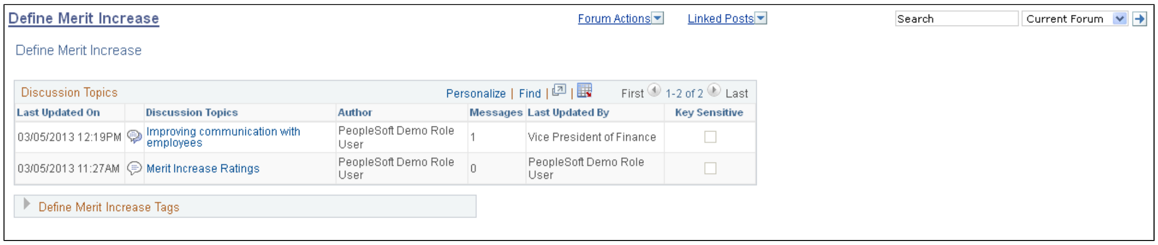
- On the transaction page, select Related Information and then select Related Discussion.

- In the related content frame, select the Related Discussion tab.

**Image: <Discussion Forum> homepage (Related Discussion service)**

This example illustrates the fields and controls on the <Discussion Forum> homepage (Related Discussion service). You can find definitions for the fields and controls later on this page.




Use the discussion forum homepage to participate in a forum.

---

**Note:** Certain functions are available on this page only if you have been granted contributor or moderator privileges for this forum.

---

**<Transaction Page> Forum**

Click the forum title to navigate to the discussion forum homepage.

**Forum Actions**

After selecting this menu, select one of the following forum actions:

- *Add Topic:* Click to access the Create New Topic page.

  ---

  **Note:** This link appears only for contributors or moderators of the forum.

  ---

- *Forum Policy:* Click to access the Forum Policy page.
- *Manage Forum:* Click to access the Manage Forum page.

  ---

  **Note:** This link appears only if you are a moderator of the forum.

  ---

**Linked Posts**

After selecting this menu, select one of the following actions:

- *Manage Linked Posts:* Click to access the Manage Linked Posts page.

  ---

  **Note:** This link appears only for moderators of the forum.

  ---

- *<Linked post title ...>:* Click to open the discussion forum and linked post in the related content frame.

**Search**

Enter the search text. Use * as a wildcard character.

**scope**

Select from the following search scopes:

- *Related Forums:* Search in all discussion forums in the Related Discussion service.

| | |
|---|---|
| | • *Current Forum:* Search in this forum only.<br>• *EP Forums:* Search in all standalone discussion forums in PeopleSoft Interaction Hub. |
| | Click the Go button to execute the search and view the Search Results page. |
| **Discussion Topics** | Click the title of a topic to view the details page for that topic. |
| **Key Sensitive** | This column indicates whether a topic was created as *key sensitive,* that is, the topic is only available for the specific transaction key or keys. When this column is unselected, the topic is available to all transaction instances. |
| **<Transaction Page> Tags** | Click to view the Tags region for the discussion forum. |

## Adding or Editing Discussion Posts

Use the Create New Topic page (EPPDF_REPLY_TOPIC) to add a discussion topic to a discussion forum.

**Navigation**

Click the Forum Actions menu in the Related Discussion service.

Click the Add Topic link.

Use the Add a Reply page (EPPDF_REPLY_TOPIC) to add a reply to a discussion post (topic or reply).

**Navigation**

Click the Reply button on the post details page.

Use the Discussion page (EPPDF_REPLY_TOPIC) to edit a discussion post (topic or reply).

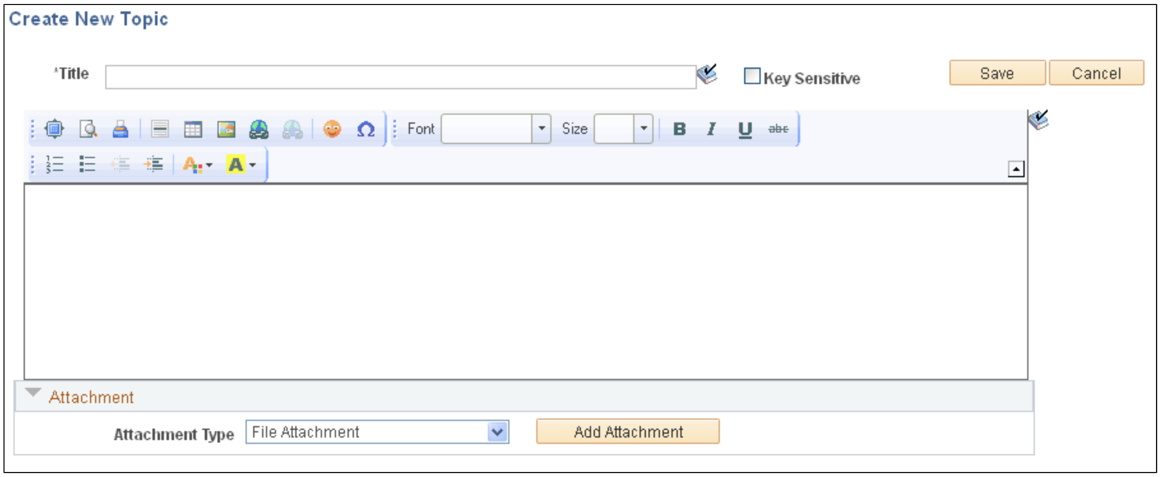
 

### Navigation

Click the Edit button on the post details page.

**Image: Create New Topic page (Related Discussion service)**

This example illustrates the fields and controls on the Create New Topic page (Related Discussion service). You can find definitions for the fields and controls later on this page.




Use the Create New Topic page to add a new discussion topic to a discussion forum.

Use the Add a Reply page to add a reply to any discussion post (topic or reply). The Add a Reply page has the same fields as the Create New Topic page.

Use the Discussion page to edit a discussion post (topic or reply). The Discussion page has the same fields as the Create New Topic page.

**Title**

Enter a title for your discussion post.

**Key Sensitive**

Select this option to make this post key sensitive, that is, the post is only available for the specific transaction key or keys.

---

**Note:** To make a post available across all transaction keys (and instances), deselect this option.

---

**<edit field>**

Use the rich text editor to enter the text of the post.

**Attachment Type**

Select the type of attachment to include with the post:

- *File Attachment:* Select to upload a local file.
- *Managed Content:* Select to attach a piece of managed content from the PeopleSoft Interaction Hub content management system.

**Add Attachment**

If you selected the *File Attachment* attachment type, click to browse and select the file to upload.

| | |
|---|---|
| **Select Content** | If you selected the *Managed Content* attachment type, click to look up the items of managed content available in the content management system. |

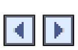
## Viewing Discussion Posts

Access the Post Details Page (click the link for a post on the discussion forum homepage or in the post details page).

**Image: Post details page (Related Discussion service)**

This example illustrates the fields and controls on the Post details page (Related Discussion service). You can find definitions for the fields and controls later on this page.


Use the post details page to view the details about a discussion post (topic or reply).

| | |
|---|---|
| **< Transaction Page> Forum Discussion Topics Detail or <Post Title>** | Click to navigate to the discussion forum homepage or to a specific post. |
| **<Author>** | Click to view the member profile for the author of the current post. |
|  | Use the Previous Topic and Next Topic buttons to navigate to the previous or next topic in this forum.<br>**Note:** Each button is active only when a previous or next topic is available. |
|  | Use the Previous Post and Next Post buttons to navigate up and down in the hierarchy of posts for this discussion topic.<br>**Note:** Each button is active only when a previous or next post is available.. When you view the topic post, click the Previous Post button to navigate to the discussion forum homepage. |
| **Reply** | Click to access the Add a Reply page to reply to this topic or to this reply. |

| | |
|---|---|
| **Edit** | Click to access the Discussion page to edit this post. |
| **Notify** | Click to access the Notify Members page to send a notification to forum participants. |
| **Delete** | Click to delete this post. Any replies to this post will also be deleted. |
| **Tags** | Click to view the Tags region for the discussion topic. |

## Deleting Posts

Access the Post Details Page for the post that you want to delete.

---

**Note:** If the post includes a reply, only the forum moderator can delete the post and any associated replies. The contributor who added the original post will be unable to delete it.

---

1. Click the Delete link.
2. Click OK to confirm that you want to delete that post and any associated replies.

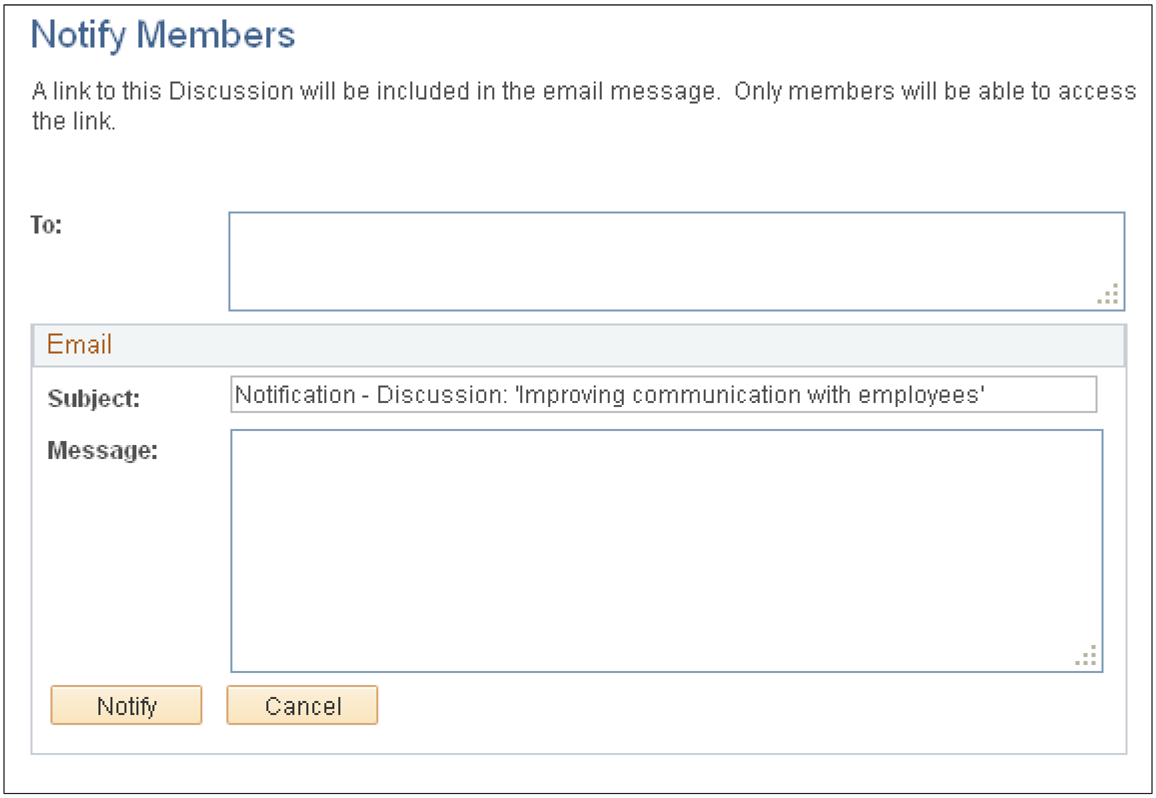
 

## Sending Email Notifications to Forum Participants

Access the Notify Members Page (click the Notify link on the post details page).

**Image: Notify Members page (Related Discussion service)**

This example illustrates the fields and controls on the Notify Members page (Related Discussion service). You can find definitions for the fields and controls later on this page.




Use the Notify Members page to compose and send an email message to discussion forum participants. The system automatically populates the To field with addresses for all members of the discussion forum who have defined an email address in their system profile.

---

**Note:** The email will contain a link to the discussion forum. Only members of the discussion forum will be able to access the forum using the link.

---

| | |
|---|---|
| **To** | Enter additional email addresses for forum participants. Separate email addresses with commas. |
| **Subject** | Enter a subject for the email. |
| **Message** | Enter the message text for your email. |
| **Notify** | Click to send the notification. |

## Using Tags in a Discussion Forum

In a discussion forum, you can add and manage tags in the Tags region at two levels:

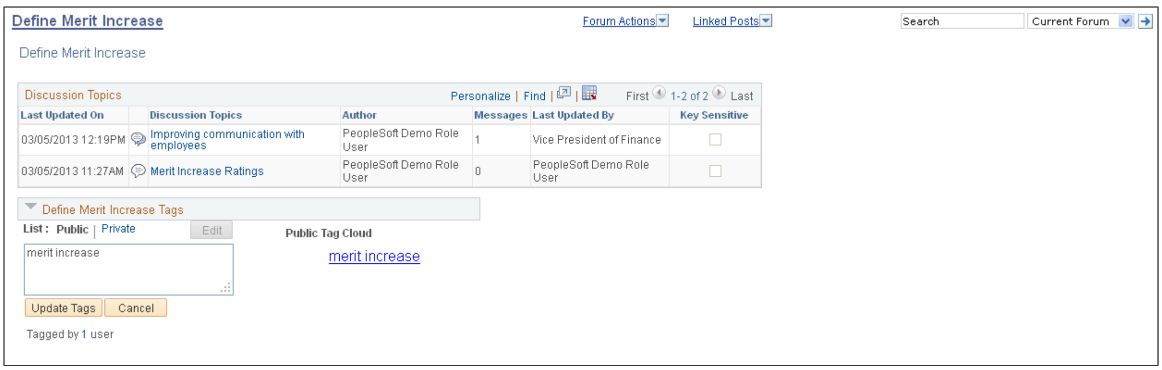
 

- At the forum level on the discussion forum homepage.
- At the topic level on the post details page.

In addition, the Tags region on the discussion forum homepage includes a tag cloud showing all tags (forum level and topic level) added to this discussion forum. The following example shows the Tags region from a discussion forum homepage:

**Image: Example of a discussion forum homepage (Related Discussion service) showing the Tags region**

This example illustrates the fields and controls on the Example of a discussion forum homepage (Related Discussion service) showing the Tags region.




In this example, user profile is a tag at the forum level. password, user ID, and general tab were added as tags at the topic level.

Creating, managing, and using tags is discussed in this PeopleBook.

See Understanding Tagging in PeopleSoft Interaction Hub.

## Search Results Page

In the Related Discussion service, you can perform three types of searches:

- Related Forums: Search in all discussion forums in the Related Discussion service.

  **Note:** Related Forums search is a SQL-based search and does a AND search on all words separated by a space. Ranking is not supported.

- Current Forum: Search in this forum only.

  **Note:** Current Forum search is a SQL-based search and does a AND search on all words separated by a space. Ranking is not supported.

- EP Forums: Search in all standalone discussion forums in PeopleSoft Interaction Hub.

  **Note:** EP Forums search is a SES-based search. For the EP Forums search, you must deploy the PAPP_DISCUSSION_POSTS search definition and category of the same name; then build the index. Ranking is supported.

See "Delivered Search Definitions and Categories" (PeopleSoft Interaction Hub 9.1: Portal and Site Administration).

This section discusses how to:

- Search in PeopleSoft Interaction Hub forums.
- Search for contextual information in related forums.

## Related Discussion Service Page

To search in PeopleSoft Interaction Hub forums:

1. Enter the search text in the Search field in the Related Discussion service.

   Use * as a wildcard character.

2. Select the EP Forums scope.

3. Click the Go button.

   **Image: Example search in the Related Discussion service**

   This example shows search text and scope with the cursor over the Go button:

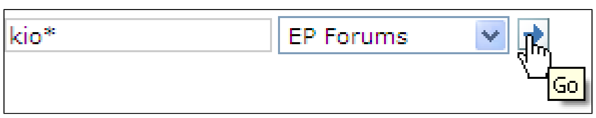
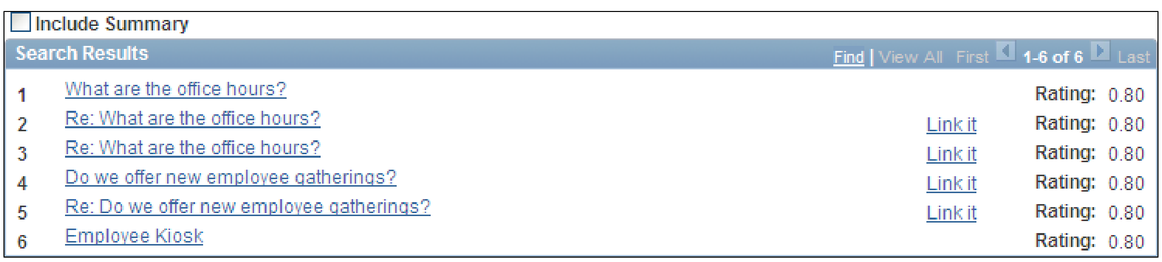



**Image: Example of Search Results page (EP Forums search scope)**

The Search Results page appears. This example shows the results of this search:




Use the Search Results page to review search results, access other posts and forums, and link to discussion posts.

| | |
|---|---|
| **Include Summary** | Select this option to show summaries in the search results. |
| **Search Results** | Click a link to view that discussion forum and post in the related content frame. |
| **Link It** | **Important!** Link It links appear only for a search type of EP Forums.<br><br>Click a Link It link to link the selected post to this discussion forum. |

---

**Note:** A Link It link does not appear for a post that is already linked to this discussion forum or for the titles of other discussion forums.

---

### Searching for Contextual Information in Related Forums

To search for contextual information, you must map context fields when the Related Discussion service is assigned to a transaction instance.

See Configure Service Page (Related Discussion Service).

To search for contextual information in related forums:

1. Enter the search text in the Search field in the Related Discussion service.

   Use * as a wildcard character.

2. Select the Related Forums scope.

3. Click the Go button.

   **Image: Example of a contextual search in the Related Discussion service**

   The following example shows search text and scope . In this example, the search term is *merit,* data that does not occur in the discussion topic title or summary or in the key field for the transaction.

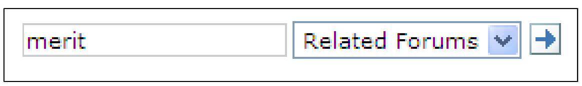
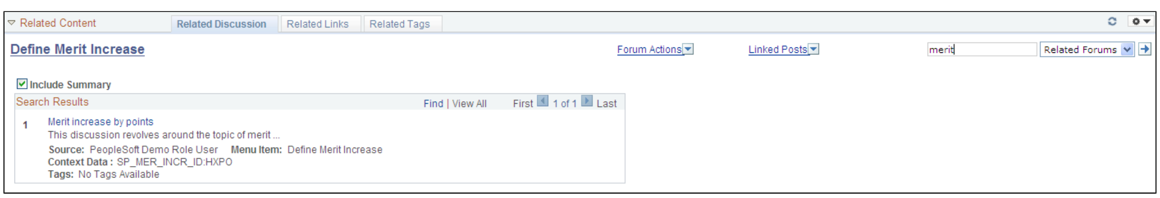



   **Image: Example of a Search Results page showing contextual data**

   The Search Results page appears. The following example shows the search results. The results include summary information that displays the topic title, topic summary, and context data, such as the key field, and additional context fields. The search term *merit* occurs in the description field only, which was added as a context field for this transaction.




   Use the Search Results page to review search results, access other posts and forums, and link to discussion posts.

| | |
|---|---|
| **Include Summary** | Select this option to show summaries in the search results. |
| **Search Results** | Click a link to view that discussion forum and post in the related content frame. |

## Linking Posts from Another Discussion Forum

To link to a post from an PeopleSoft Interaction Hub discussion forum:

1. Access the Search Results Page by performing a search in the Related Discussion service.

   ---

   **Note:** Select a search scope of EP Forums to access posts that can be linked in the Related Discussion service.

   ---

2. Click a Link It link to link the selected post to this discussion forum.

### Related Links

"Understanding Search in PeopleSoft Interaction Hub" (PeopleSoft Interaction Hub 9.1: Portal and Site Administration)

## Forum Policy Page

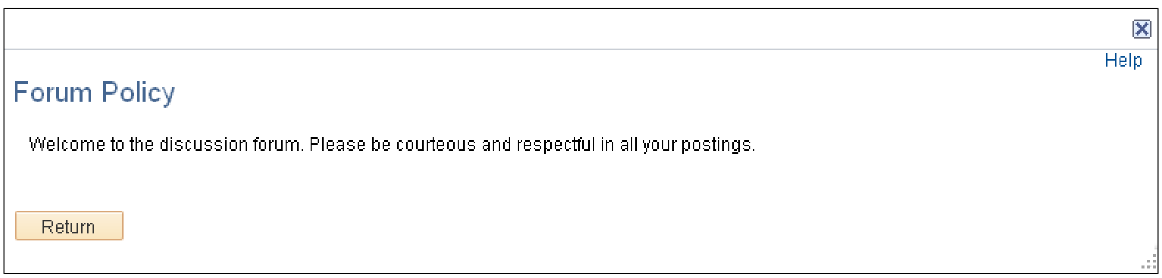
Use the Forum Policy page (EPPDF_FORUM_POLICY) to enter a policy statement for the discussion forum.

**Navigation**

On the Manage Forum page, select the Forum Policy page.

**Image: Forum Policy Page (viewing)**

This example illustrates the fields and controls on the Forum Policy Page (viewing).

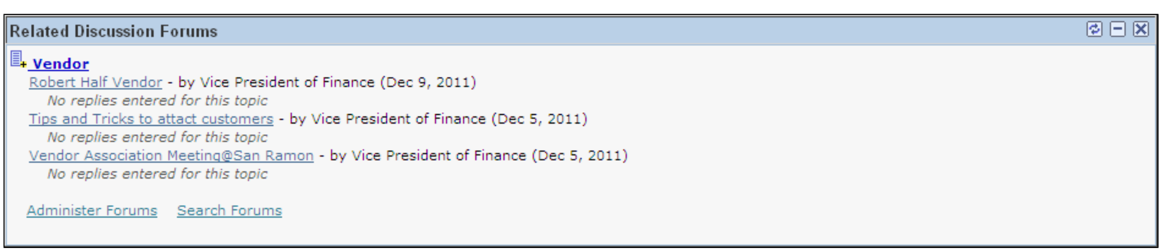



Use the Forum Policy page to review the policy statement for the discussion forum.

# Working with the Related Discussion Forums Pagelet

**Image: Related Discussion Forums pagelet**

Related Discussion Forums pagelet. Access the Related Discussion Forums pagelet on the portal homepage.




Use the Related Discussion Forums pagelet to access and manage discussions, topics, and replies for forums created through the Related Discussion service.

Click the Create a Topic button to access the Create New Topic page within the corresponding discussion forum.

**<Discussion Forum>**

Click a discussion forum link to access the discussion forum's homepage on which you can view details about the forum.

The hover text of the discussion forum link displays the description of the discussion forum.

**<Topic Title>**

Click a topic link to access the Post Details page on which you can view details about the topic.

**<Reply Title>**

Click a reply link to access the Post Details page on which you can view details about the reply.

**Administer Forums**

Click to access to the Manage Related Discussions page for all discussion forums created as related discussions. This link displays for portal administrators only.

See Administer Discussion Forums Page.

**Search Forums**

Click to access the Search Discussion Forums page on which you can perform a search of text in the discussion forums to which you belong.

See Performing Searches Within Discussion Forums.

## Chapter 23

# Working With the Related Links Service

## Understanding the Related Links Service

The Related Links related content service enables you to associate links to relevant content for a current transaction instance or for all instances in a transaction. These links are available to all users of the transaction and assist in providing easy access to relevant information for executing the process. The Related Links service enables you to:

- Link to content residing in PeopleSoft Interaction Hub, specifically blogs, discussions, or collaborative workspaces.
- Add links to external URLs.
- Add file attachments.
- Create a new workspace and link that workspace to the transaction.
- Create two-way navigation between the linked workspaces and transaction data.
- View the discussions created using the Related Discussion service in the linked workspaces.
- Define access security for the related information. You must set access security for all existing related links and new related links. Only users who have permission to access a particular transaction can also access the related links.

## Creating and Using Links with the Related Links Service

This topic discusses ways to view linked content, create links to related content and related workspace.

### Pages Used to Create and Use Links with the Related Links Service

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| Linked Content Page | EPPRS_LINK_CNT | Navigate to linked content. |
| Add File Attachment Page | EPPRS_ADD_LINK | Upload a file attachment. |
| Linking to Existing Content Page | EPPRS_ADD_LINK | Create links to existing PeopleSoft Interaction Hub content and to external URLs. |
| Create and Link Workspace Page | EPPRS_WS_CREATE | Create a collaborative workspace in PeopleSoft Interaction Hub and link to this workspace. |

## Linked Content Page

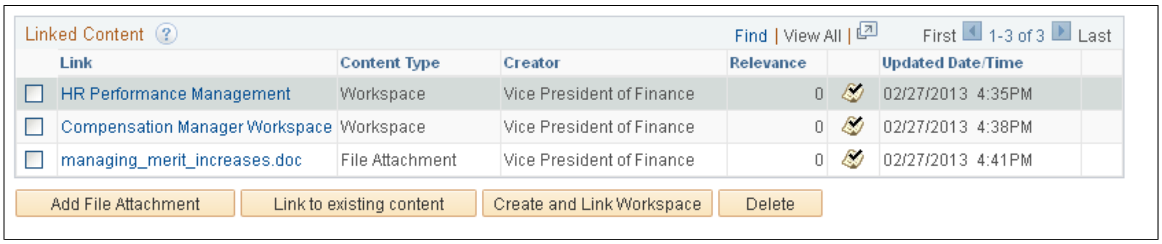
Use the Linked Content page (EPPRS_LINK_CNT) to navigate to linked content.

**Navigation**

On the transaction page, select Related Content,  Related Links.

**Image: Linked Content page**

This example illustrates the fields and controls on the Linked Content page. You can find definitions for the fields and controls later on this page.




Use the Linked Content page to navigate to the linked content. The links on this page are initially ordered by the date and time the link was created, in reverse chronological order. Similar to other PeopleSoft grids, you can resort the information by content type, relevance, creator, and so on.

**Link**

Clicking a link opens the link target in a separate browser window. When you click the link for a file attachment, the attachment is downloaded and opened on your computer using the ViewAttachment PeopleCode function.

---

**Note:** Depending on the file type and the browser you are using, a separate application might be executed to open the attachment, a separate browser window might be opened displaying the attachment, or you might be prompted to save or open the file.

---

**Relevance**

Click the Relevance icon button to the right of the Relevance column to indicate whether you think a link is relevant, which will add one to the current relevance score. After you mark a link as relevant, the Relevance icon button becomes disabled and you cannot change your relevance rating for that link.

**Shared Link**

The Shared Link icon indicates that a link was created as shared across all instances of this transaction. If no icon is displayed, then the link is unique to this instance of the transaction.

## Add File Attachment Page

Use the Add File Attachment page (EPPRS_ADD_LINK) to upload a file attachment.

**Navigation**

On the Related Links tab, click the Add Attachment button on the Linked Content page.

You can attach files and create links to existing content.

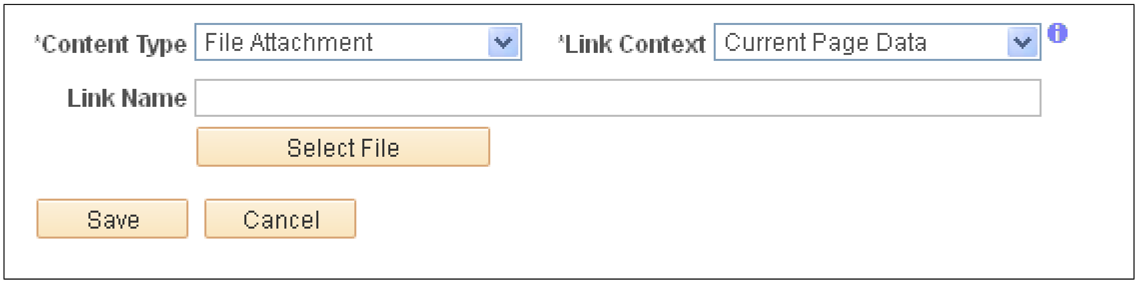
 

### Adding Attachments

Access the Add File Attachment Page to attach files (on the Related Links tab, click the Add File Attachment button on the Linked Content page).

**Image: Add File Attachment Page**

This example illustrates the fields and controls on the Add File Attachment Page. You can find definitions for the fields and controls later on this page.




Use the Add File Attachment page to attach files either to the application page or the current page. File attachments are uploaded from your computer to the storage location defined by your PeopleSoft Interaction Hub administrator.

See Understanding the Setup of Related Content Services.

| | |
|---|---|
| **Content Type** | Specifies *File Attachment* as the content type. The content type cannot be changed. |
| **Link Context** | Select the placement of the attachment.<br>• *Current Page Data:* Indicates that the attachment is unique to the current transaction instance.<br>• *Current Application Data:* Indicates that the attachment is shared and available to all instances of this transaction. |
| **Additional Information** | Place your mouse cursor over the icon to display a pop-up with additional information including the page name, context keys, and key values. |
| **Link Name** | By default, this field provides the name of the uploaded file; you can override the default link name. |
| **Select File** | Click to browse and upload the file. |
| **Save** | Click to save the attachment and return to the Linked Content page. |

## Linking to Existing Content Page

Use the Link to Existing Content page (EPPRS_ADD_LINK) to create links to existing PeopleSoft Interaction Hub content and to external URLs.

### Navigation

On the Related Links tab, click the Link to existing content button on the Linked Content page.

**Image: Link to Existing Content page**

This example illustrates the fields and controls on the Link to Existing Content page. You can find definitions for the fields and controls later on this page.


Use the Link to Existing Content page to create links to existing PeopleSoft Interaction Hub content and to external URLs.

**Content Type**

Select the content type for the link.

---

**Important!** To search for blogs, discussions, and workspaces in the PeopleSoft Interaction Hub database, you must build and maintain search indexes for each of those scopes in the PeopleSoft Interaction Hub database.

---

Select from these values:

- *External URL:* Select this option to create a link to an external URL.
- *Portal Blogs:* Select this option to search for postings to PeopleSoft Interaction Hub blogs.
- *Portal Discussions:* Select this option to search for postings to PeopleSoft Interaction Hub discussion forums, including standalone discussion forums, discussions within linked workspaces, and Context Manager related discussions.
- *Workspaces:* Select this option to search for PeopleSoft Interaction Hub collaborative workspaces.

**Link Context**

Select the context for the link:

- *Current Page Data:* Indicates that the link is unique to the current transaction instance.
- *Current Application Data:* Indicates that the link is shared and available to all instances of this transaction.

**Additional Information**

Place your mouse cursor over the icon to display a pop-up with additional information including the page name, context keys, and key values.

**Link Name**

Provides the link name on the Linked Content page. This field provides the name of the item selected in the search results by default; you can override the default link name. You must enter a name for an external URL.

| | |
|---|---|
| **Search Text** | Enter search text.<br><br>Leave this field blank or use the * wildcard character to search for all instances of a given content type. |
| **Search** | Click to perform the search.<br><br>**Note:** To search for blogs, discussion forums, or workspaces, the portal administrator must build and maintain appropriate search indexes.<br><br>See "Building Search Indexes" (PeopleSoft Interaction Hub 9.1: Portal and Site Administration). |
| **Save** | Click the Save button to save the link and return to the Linked Content page.<br><br>**Note:** Select a link in the search results before you click the Save button; otherwise, an error message or invalid link will result. |
| **Cancel** | Click to return to the Linked Content page without creating a link. |
| **Page label to appear in the Workspace** | **Note:** This option is available only when *Workspaces* is selected as the content type.<br><br>Enter an optional label for the page that appears in the Workspace. |
| **Include Related Discussions to the Workspace** | **Note:** This option is available only when *Workspaces* is selected as the content type.<br><br>Select this option to include any related discussions associated with this transaction in the workspace. |
| **Search Results** | Select an item from the search results to be the target of the link. |

## Create and Link Workspace Page

Use the Create and Link Workspace page (EPPRS_WS_CREATE) to create a collaborative workspace in PeopleSoft Interaction Hub and link to this workspace.

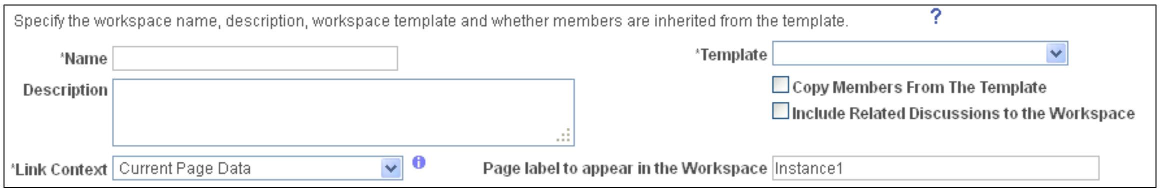
 

### Navigation

On the Related Links tab, click the Create and Link Workspace button on the Linked Content page.

### Image: Create and Link Workspace Page

This example illustrates the fields and controls on the Create and Link Workspace Page. You can find definitions for the fields and controls later on this page.




Use the Create and Link Workspace page to create a new workspace and to create a link to that workspace from the current transaction or transaction instance.

| | |
|---|---|
| **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. |
| **Template** | Select the template on which you want to base your linked workspace.<br><br>**Note:** If the transaction is registered with a template in PeopleSoft Interaction Hub, then that template is automatically be selected. |
| **Description** | Enter an optional description for the workspace.<br><br>This description also becomes the default welcome text, which appears in the Welcome module if that module is configured for this workspace. |
| **Copy Members From the Template** | Select this option to copy the members and privileges from the workspace template. |
| **Include Related Discussions to the Workspace** | Select this option to include any related discussions associated with this transaction in the workspace. |
| **Link Context** | Select the context for the link:<br><br>• *Current Page Data:* Indicates that the link is unique to the current transaction instance.<br><br>• *Current Application Data:* Indicates that the link is shared and available to all instances of this transaction. |
| **Additional Information** | Place your mouse cursor over the icon to display a pop-up with additional information including the page name, context keys, and key values. |

| | |
|---|---|
| **Page label to appear in the Workspace** | Enter an optional label for the page. |
| **Save** | Click the Save button to create the workspace.<br><br>The linked workspace opens in a new window with the Administration - Properties page displayed |
| **Cancel** | Click to return to the Linked Content page without creating a workspace. |

## Related Links

"Setting Up a Workspace" (PeopleSoft Interaction Hub 9.1: Collaborative Workspaces)

Chapter 24

# Working With the Related Tags Service

## Understanding the Related Tags Service

The Related Tags related content service allows you to create user-specified tags for the current transaction instance. You can characterize and bookmark these transactional or business objects with terminology of your choosing, providing ease of access as well as collaborative classification of the transaction. For example, a specific vendor ID might be tagged by buyers to identify certain characteristics of the vendor. A benefits clerk might tag a specific employee's benefits record to bookmark it for easy access later.

See Creating and Using Tags with the Related Tags Service

See Creating and Managing Tags

## Creating and Using Tags with the Related Tags Service

This topic discusses ways to view, create and search tags in the Related Tags service.

### Pages Used to Create and Use Tags with the Related Tags Service

| ***Page Name*** | ***Definition Name*** | ***Usage*** |
|---|---|---|
| Related Tags Page | EPPTG_RC_TAGGING | Create and view tags for this transaction instance. |
| Search Tags Page | EPPTG_TAG_BROWSE | Search for tags. |

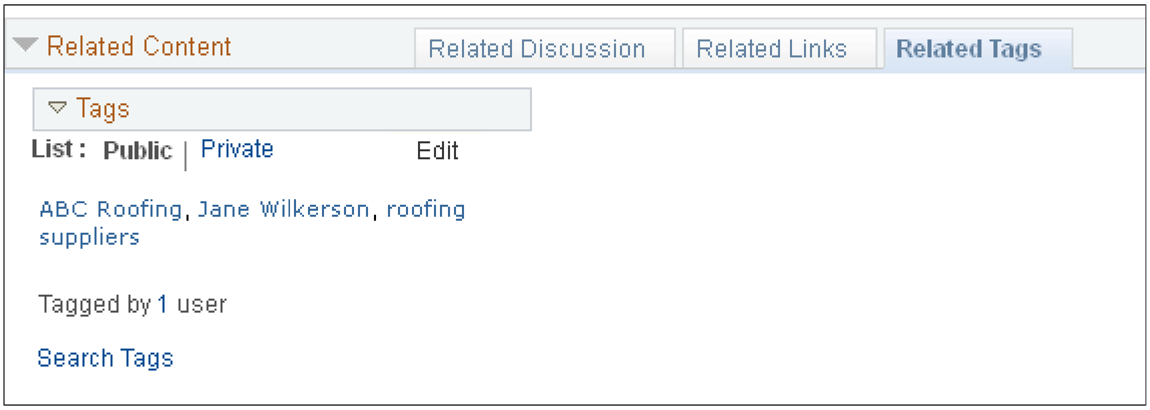
 

## Related Tags Page

Access the Tags region (in the related content frame, select the Related Tags tab).

**Image: Related Tags service: Tags region (view mode)**

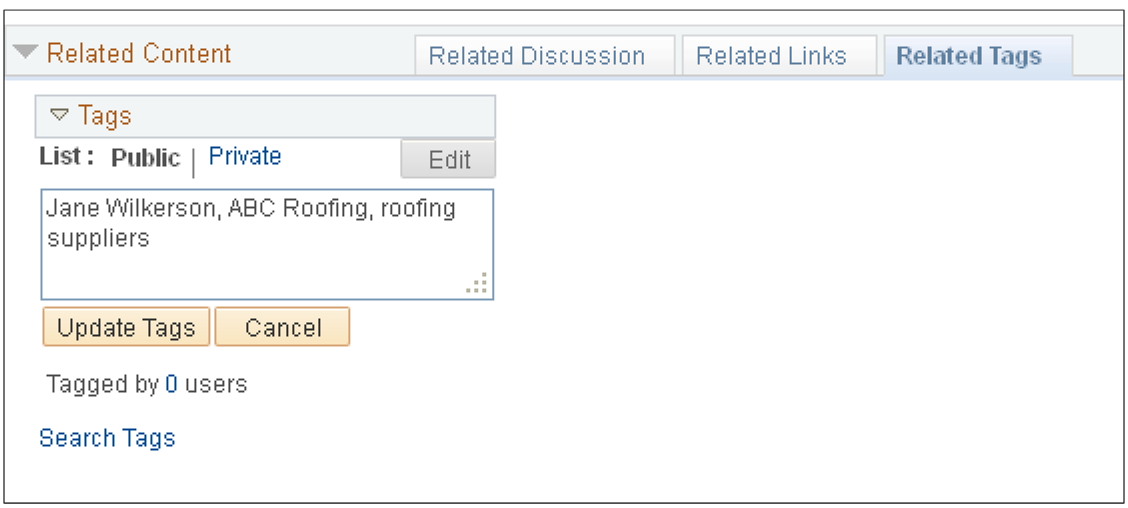
This example illustrates the fields and controls on the Related Tags service: Tags region (view mode). You can find definitions for the fields and controls later on this page.




Use the Related Tags service, Tags region to view and create tags for a transaction instance. In view mode, the Edit button is active. In update mode, the Update Tags and Cancel buttons are active.

**Image: Related Tags service: Tags region (update mode)**

This example illustrates the fields and controls on the Related Tags service: Tags region (update mode). You can find definitions for the fields and controls later on this page.




 Click the Collapse icon to hide the content in the Tags region; click the Expand icon to reveal the content in the Tags region.

**Public** Click this link to view or edit your public tags for this transaction instance.

**Private** Click this link to view or edit your private tags for this transaction instance.

| | |
|---|---|
| **Edit** | Click this button to create tags or update tags for this transaction instance. |
| **<edit box>** | In view mode, click a tag link to open the Search Tags page in a new browser window searching on this tag.<br><br>In update mode, enter tags separated by commas.<br><br>**Important!** We recommend that you avoid special characters in tags.<br><br>See Special Characters and Tag Searches. |
| **Update Tags** | Click to save any changes and return to view mode. |
| **Cancel** | Click to cancel any changes and return to view mode |
| **Tagged by #** | Mouse over the number link to view which users have tagged this item. |
| **Search Tags** | Click this link to open the Search Tags page in a new browser window without defining a search tag. |

## Search Tags Page

Use the Search Tags page (EPPTG_TAG_BROWSE) to search for tags.

**Navigation**

- Click a tag in the Tags region.
- Click the Search Tags link.

Use the Search Tags page to search for tags. On this page, you can type the tag text or click a tag link in the Tag Cloud frame. You can specify the tag namespace in which to search, and you can indicate whether to search your public or private tags.

The use of the Search Tags Page is covered in this PeopleBook.

See Performing Searches for Tags.

## Chapter 25

# Working With the RELATEDCMCONTENT Service

## Assigning the RELATEDCMCONTENT Service to an Application Page

**Important!** The RELATEDCMCONTENT related content service can be used only on application pages in a PeopleSoft Interaction Hub system. It cannot be used on an application page in another PeopleSoft application. For example: You cannot retrieve a content item from the content management system in PeopleSoft Interaction Hub from PeopleSoft FSCM.

Use the Assign Related Content page to assign the RELATEDCMCONTENT service to an application page.

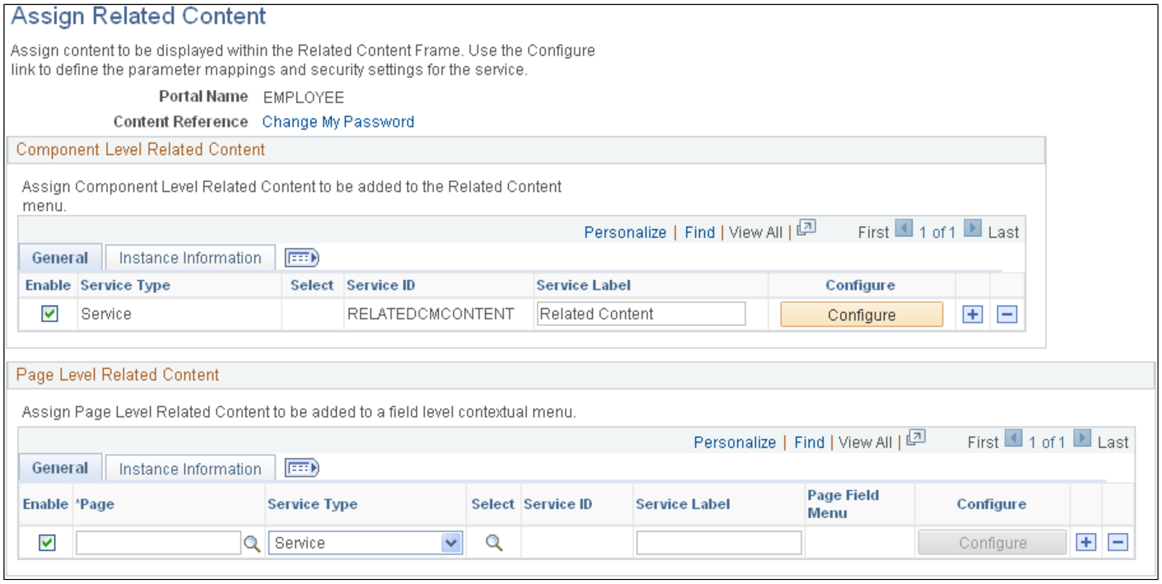
1. Click People Tools, Portal, Related Content Service, Managed Related Content Service.
2. Click Assign Related Content to Application Pages link.
3. Navigate through the tree hierarchy of content references.
4. Select the content reference to which to this assign related content service.

   The Assign Related Content page appears.

5. In the Component Level Related Content grid, click the prompt button and select the RELATEDCMCONTENT service ID.

   **Image: Assign Related Content page**

   This example illustrates the fields and controls on the Assign Related Content page for the RELATEDCMCONTENT service.




See *PeopleTools: Portal Technology* “Developing and Configuring Related Content Services.

---

**Note:** In the preceding example, the RELATEDCMCONTENT service was configured as a component-level service. Alternately, the RELATEDCMCONTENT service can be configured as a page-level service or as a related action.

---

## Configuring the RELATEDCMCONTENT Service

Use the Configure Service page (PTCS_SVCCFGCRC_SEC) to identify which piece of content from the content management system appears as related content.

You must first obtain the content ID before you configure the service since the RELATEDCMCONTENT service requires the content ID but does not provide a lookup to identify valid IDs. You can use the Maintain Content page to get a list of valid content items and IDs:

1. Select Content Management, Advanced Options, Maintain all Content.

2. Click Search.

See the product documentation for *PeopleSoft Interaction Hub: Content Management System*, "Maintaining All Content" (PeopleSoft Interaction Hub 9.1: Content Management System).

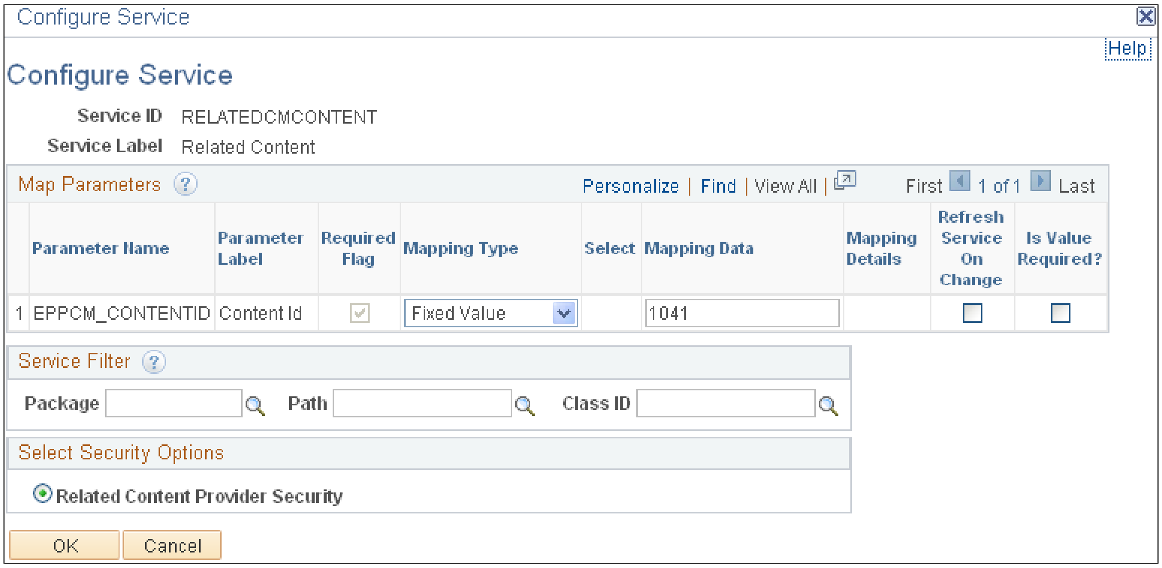
 

### Navigation

On the Assign Related Content page, click the Configure button for the RELATEDCMCONTENT service.

### Image: Configure Service (RELATEDCMCONTENT) page

This example illustrates the fields and controls on the Configure Service (RELATEDCMCONTENT) page.




1. From the Mapping Type list, select *Fixed Value*.
2. In the Mapping Data field enter the content ID.
3. Click OK.
4. Click Save.

## Chapter 26

# Designing Template Pagelets for Context Manager

## Designing Template Pagelets

**Note:** Template pagelets can also be created using Pagelet Wizard. We recommend that you consider using this as it provides a means for simple and convenient creation and maintenance of template pagelets.
This topic is meant to provide information about how to create template pagelets that are more complex than those that can be created using Pagelet Wizard.

See the product documentation for *PeopleTools: Portal Technology*

Unlike homepage pagelets, template pagelets are usually designed to work with contextual relationships —that is, template pagelets are usually required to retrieve the current target page context and display relevant information accordingly.

For examples of context aware processing, examine the template pagelets and associated features delivered with your application.

Template pagelets can be created based on either page definitions in PeopleSoft Application Designer or iScripts.

**Note:** Whether template pagelets are created from page definitions in Application Designer or an iScript, they will also require some PeopleCode development to retrieve information about the target page to enable context sensitivity.

### Sample iScript Template Pagelet

The following code is for example purposes only and should not be considered as a design template.

```
import PTCXM_TEMPLATE_PAGELET:*;

/*********************************************************************/
/* Generic Template Pagelet iScript Sample                           */
/* Sample code to demonstrate how to use the PTCXM_TEMPLATE_PAGELET  */
/* app package classes to generate a template pagelet in iScript.    */
/*********************************************************************/

Function iScript_TemplatePagelet(&Type As string)
   &TPRequest = create PTCXM_TEMPLATE_PAGELET:TPRequest();
   &TPResponse = create PTCXM_TEMPLATE_PAGELET:TPResponse();
   If &TPResponse.isThisPageletMinimized() Then
      &HTML = ""; /* pagelet is minimized - only needed for hidden pagelets */
   Else
      If &TPRequest.isTCKeyDependant() Then
         If &TPRequest.isTCAvailable() And
               &TPRequest.GetNumTCKeys() > 0 Then
            For &i = 1 To &TPRequest.GetNumKeys()
```

```
                &KeyName = &TPRequest.GetTCKey(&i);
                &KeyValue = &TPRequest.GetTCKeyValueByIndex(&i);
                If All(&KeyValue) Then
                   /* Process key/value pair */
                   &HTML = &val_1; /* result of processing */
                End-If;
             End-For;
          Else
             /* Processing for key dependant - but keys not available */
             &HTML = &val_2; /* result of processing */
          End-If;
       Else
          /* Processing for non-key dependancy */
          &HTML = &val_3; /* result of processing */
       End-If;
    End-If;
    &TPResponse.WritePageletHTML(&HTML, "", "");
End-Function;
```

## Defining Hidden Template Pagelets

iScript-based template pagelets can be defined so that they can be hidden. When a template pagelet is hidden, no information about that pagelet will be displayed to the user, including the template boundary box and pagelet title. This is useful when you only want to display information when a specific context is detected.

To create a hidden template pagelet, you will need to write special pagelet output so that the pagelet container will only be generated when appropriate.

Instead of using the %Response.Write method to write HTML directly, make a buffer variable available to display the HTML code. To create the pagelet output, a call to the method `TResponse.WritePageletHTML(&HTML, "", "")` should be included.

---

**Note:** When the pagelet is minimized, Oracle recommends calling the WritePageletHTML method with a blank HTML buffer variable. When using this method, no container is created and no trace of the pagelet is visible to the end user.

---

When the template pagelet is registered, the attribute CANBEHIDDEN must be set with the value of TRUE.

# Exposing a Custom Key Structure to the Context Manager

To expose a custom key structure to Context Manager, at least one of the following two custom JavaScript objects must be created on the target application page:

- PIA_KEYSTRUCT.

  Primary key structure object. This object is automatically created with no page modifications necessary.

- PS_KEYSTRUCT.

  Secondary key structure object. Use this structure to get non-primary keys, such as alternate search keys.

**Note:** Both the PIA_KEYSTRUCT and the PS_KEYSTRUCT objects can be present on the same page. However, if both objects contain a value for the same key, the value set in PIA_KEYSTRUCT takes precedence.

The following is an example of exposing two alternate parameters as key values for the Context Manager: altkey1:altvalue1 and altkey2:altvalue2.

Using PeopleSoft Application Designer, add an HTML area to the page and link it to the DEMOFIELD field on the workrecord WORKREC. In the appropriate PeopleCode events, add the following:

```
WORKREC.DEMOFIELD.Value = "<SCRIPT Language='JavaScript'> var PS_KEYSTRUCT =
{altkey1: 'altvalue1 ',altkey2: 'altvalue2 '};</SCRIPT> ";
```

**Note:** The example assumes that the target application and PeopleSoft Interaction Hub have been set up on the same internet domain and are configured. Specifically, it is a requirement that both have an internet address similar to *http://xxx.company.com/* and that PeopleSoft Interaction Hub has its domain set to *company.com*.

# Using the Context Manager API

This section provides reference documentation on the Context Manager API, which is provided by the PTCXM_TEMPLATE_PAGELET application package. The classes, methods, and properties in this package are used to provide a supporting structure for template pagelets.

## Importing the Context Manager API Classes

The Context Manager API classes are application classes (not a built-in class, like Rowset, Field, Record, and so on). Therefore, before you can use these classes in your implementation, you must import these classes into your program.

An import statement either names a particular application class or imports all the classes in a package.

Using the asterisks after the package name makes all the application classes directly contained in the named package available. Application classes contained in subpackages of the named package are not made available.

For the Context Manager API classes, since there are no subpackages, use an import statement similar to the following:

```
import PTCXM_TEMPLATE_PAGELET:*;
```

# TPRequest Class Methods

The following are the TPRequest class methods listed in alphabetical order.

# GetNumTCKeys

## Syntax

`GetNumTCKeys(param1)`

## Description

Use this method to return the number of key fields available from the target content page. This method returns Null if key fields are not available.

## Parameters

None.

## Returns

Number.

# GetTCKey

## Syntax

`GetTCKey(index)`

## Description

Use this method to return the name of a key field by its index number. This method returns Null if key field names are not available.

## Parameters

| ***Parameter*** | ***Description*** |
|---|---|
| *index* | Specifies the position of the key in the array of keys as a number. |

## Returns

String.

# GetTCKeys

## Syntax

`GetTCKeys()`

## Description

Use this method to return the key field names available from the target content page that have been defined through the Context Manager. This method returns Null if the list of key field names is not available.

### Parameters

None

### Returns

An array of string.

## GetTCKeyValue

### Syntax

**`GetTCKeyValue`**`(`*`key`*`)`

### Description

Use this method to return the value of a key field from the target content page. This method always returns a string regardless of the actual field data type as defined on the page. This method returns Null if the specified key value is not available.

**Note:** For a given key, GetTCKeyValue and GetTCKeyValueByIndex return the same value.

### Parameters

| ***Parameter*** | ***Description*** |
| --- | --- |
| *key* | Specifies the name of the key as a string. |

### Returns

String.

## GetTCKeyValueByIndex

### Syntax

**`GetTCKeyValueByIndex`**`(`*`index`*`)`

### Description

Use this method to return the value of a key field by its index number. This method always returns a string regardless of the actual field data type as defined on the page. This method returns Null if the specified key value is not available.

**Note:** For a given key, GetTCKeyValueByIndex and GetTCKeyValue return the same value.

### Parameters

| Parameter | Description |
|---|---|
| *index* | Specifies the position of the key in the array of keys as a number. |

### Returns

String.

## isTCKeyAvailable

### Syntax

**isTCKeyAvailable**()

### Description

Use this method to return a Boolean value indicating whether key values from the target content page are available.

### Parameters

None.

### Returns

A Boolean value: True if key values from the target content page are available, False otherwise.

## isTCKeyDependant

### Syntax

**isTCKeyDependant**()

### Description

Use this method to return a Boolean value indicating whether the current pagelet instance was defined to be dependent on target content key values.

### Parameters

None.

### Returns

A Boolean value: True if the current pagelet was defined to be dependent on target content key values, False otherwise.

# TPRequest Class Properties

The following are the TPRequest class properties listed in alphabetical order.

## CREF_Label

### Description

Use this property to return a string representing the Label field from the portal registry for the current template pagelet.

This property is read-only.

## CREF_Name

### Description

Use this property to return a string representing the Name field from the portal registry for the current template pagelet.

This property is read-only.

## PortalActualURL

### Description

Use this property to return a string representing the full URL of the target page including any query string parameters.

This property is read-only.

## PortalContentURL

### Description

Use this property to return a string representing the URL of the target page as an exact match to that stored in the portal registry. This property returns Null if the target page is not registered in the portal registry.

This property is read-only.

## ReturnURL

### Description

## TargetContent_CREF

### Description

Use this property to return an ApiObject representing the portal registry object for the target content page. This property is used to uniquely identify target pages.

This property is read-only.

## TargetFullURL

### Description

Use this property to return the full URL of the target page, including any additional key parameters needed to uniquely identify the target page. This property is read-only.

This property is read-only.

# TPResponse Class Methods

The following are the TPResponse methods:

## isThisPageletMinimized

### Syntax

**`isThisPageletMinimized`**`(`*`param1`*`)`

### Description

Use this method to return a Boolean value indicating whether the current instance of the template pagelet is minimized.

This method should be used by hidden template pagelets only. When a hidden template pagelet is minimized, no data is shown within the pagelet. However, the hidden pagelet is still called. To avoid unnecessary processing, template pagelets that can be hidden should always check this property before processing, and return immediately if false.

**Note:** This method should not be used for template pagelets without the CANBEINVISIBLE attribute set.

### Parameters

None

### Returns

A Boolean value: True if the current pagelet is minimized, False otherwise.

# WritePageletHTML

## Syntax

**WritePageletHTML**(*HTML, CREF_label, CREF_name*)

## Description

Use this method to write special pagelet output so that the pagelet container will only be generated when appropriate.

Use this method with template pagelets that can be hidden. If the pagelet is currently not displayed (that is, minimized), call this method with the HTML parameter set to an empty string.

Oracle recommends calling this method with both CREF_label and CREF_name set to an empty string.

**Note:** This method should not be used for template pagelets without the CANBEINVISIBLE attribute set.

## Parameters

| ***Parameter*** | ***Description*** |
|---|---|
| *HTML* | Specifies the HTML to be written to the template pagelet as a string. |
| *CREF_label* | Specifies the label for the template pagelet as a string. Specifying an empty string will cause the Context Manager to look up the appropriate value in the portal registry. |
| *CREF_name* | Specifies the name for the template pagelet as a string. Specifying an empty string will cause the Context Manager to look up the appropriate value in the portal registry. |

## Returns

None

## Example

```
&TPResponse.WritePageletHTML(&HTML, "", "");
```

## Related Links

Understanding Context Manager Setup