
PeopleSoft Interaction Hub 9.1: Collaborative Workspaces

September 2014

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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 After a new release is posted, previous releases remain available but are no longer updated.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.

| <i>Typographical Convention</i> | <i>Description</i> |
|--|---|
| 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. |

| <i>Typographical Convention</i> | <i>Description</i> |
|--|---|
| & (ampersand) | <p>When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object.</p> <p>Ampersands also precede all PeopleCode variables.</p> |
| ⇒ | <p>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.</p> |

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)

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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 accessibility.
- 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 of 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.

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Understanding Collaborative Workspaces

Collaborative Workspaces

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

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

You can create workspaces to manage many different collaboration scenarios. Some examples include:

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

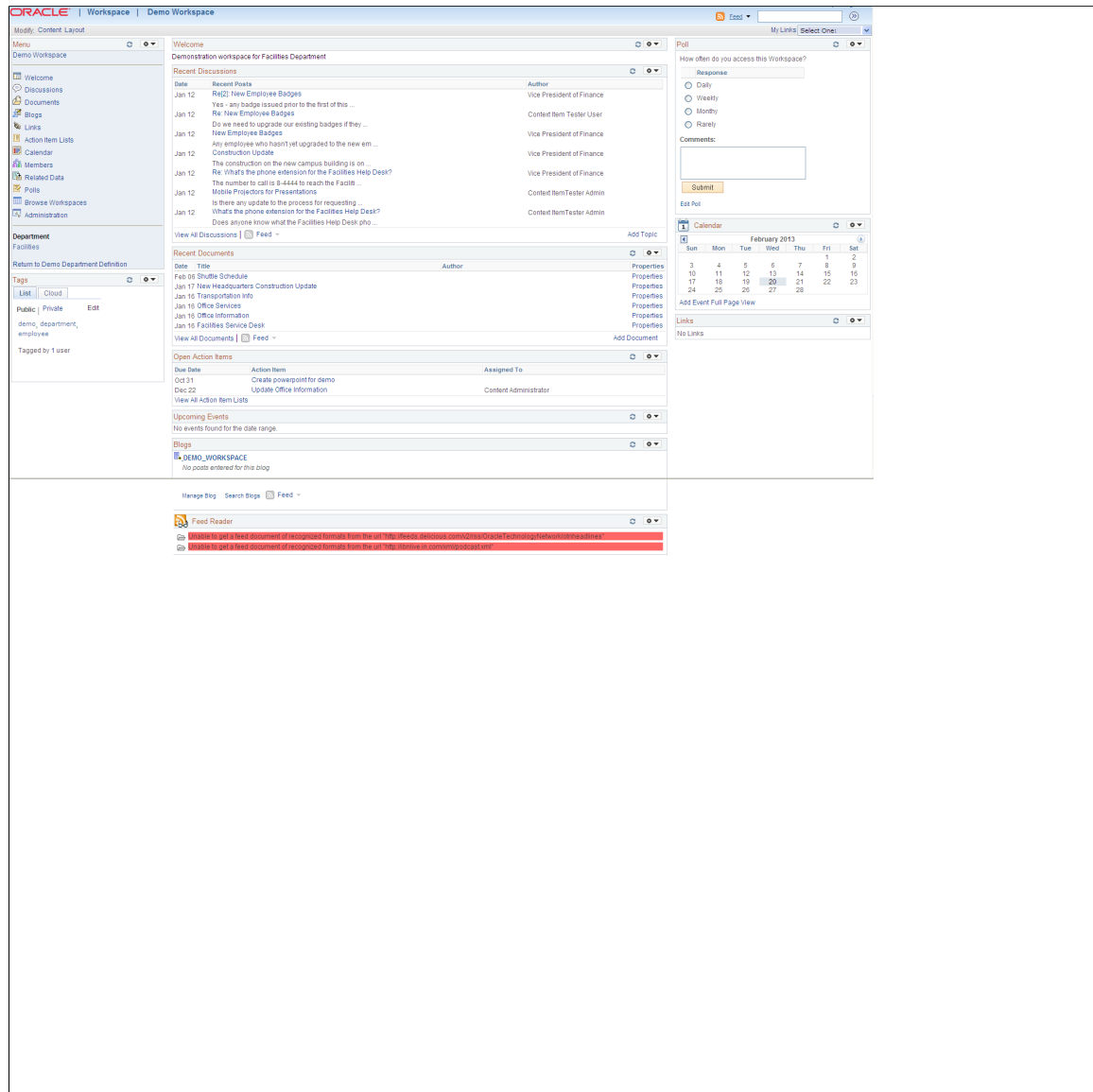
The Workspace Homepage

The workspace administrator can configure the workspace homepage to display pagelets relevant to the content of the workspace, including pagelets associated with each workspace module. The workspace

homepage displays the modules selected for the workspace in the menu on the left and the pagelets selected for the workspace homepage in selected columns, as shown in this example:

Image: Example of a workspace homepage

This example illustrates the fields and controls on the Example of a workspace homepage.

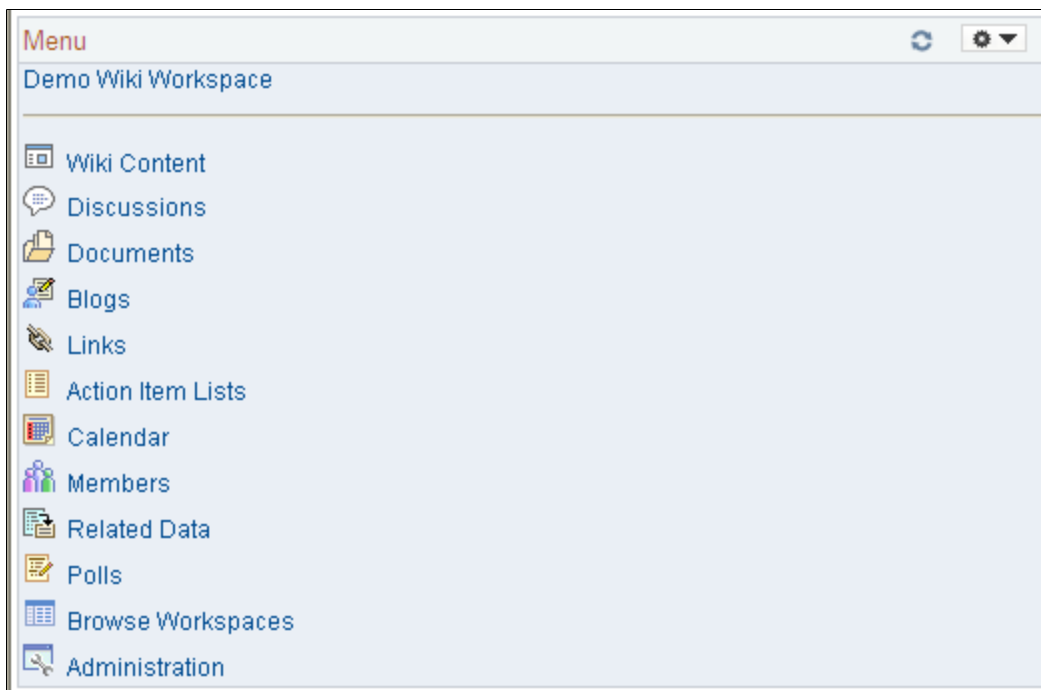


The Workspace Menu

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

Image: Example of the workspace menu

This example illustrates the fields and controls on the Example of the workspace menu.



Workspace Modules

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

Image: Example of module administration

This example illustrates the fields and controls on the Example of module administration.

Select which modules you would like for this workspace.

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

There is no related pagelet found for this workspace.

[Add Related Pagelet](#)

These modules are available in a workspace:

- Welcome module.

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

See [Administering the Workspace Properties Page](#).

- Wiki Content module.

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

See [Using the Wiki Content Module](#).

- Discussions module.

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

See [Using the Discussions Module](#).

- Documents module.

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

See [Using the Documents Module](#).

- Blogs module.

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

See [Using the Blogs Module](#).

- Links module.

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

See [Using the Links Module](#).

- Action Item Lists module.

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

See [Using the Action Item Lists Module](#).

- Calendar module.

Use the Calendar module to maintain the workspace calendar and events and to coordinate activities of the workspace team. Members can also monitor current events using the Upcoming Events and Calendar pagelets that appear in the workspace homepage. The Calendar pagelet can simultaneously display events from the workspaces, action items from the workspace, and a user's personal tasks.

See [Using the Calendar Module](#).

- Members module.

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

See [Using the Members Module](#).

- Related Data module.

Use the Related Data module to access a collection of pagelets relevant to a workspace. The workspace administrator compiles this collection of pagelets.

See [Using the Related Data Module](#).

- Polls module.

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

See [Using the Polls Module](#).

- Browse Workspaces module.

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

See [Using the Browse Workspaces Module](#).

- Administration module.

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

See [Setting Up a Workspace](#).

Chapter 2

Setting Up Collaborative Workspace Options and Templates

Understanding Workspace Setup

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

1. Set up system options.
 2. Create a workspace category hierarchy.
 3. Set up instant messaging for workspaces.
 4. Create workspace templates.
-

Setting Up System Options for Workspaces

This section discusses how to set system options for workspaces.

Page Used to Set Up System Options for Workspaces

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|----------------------------------|-------------------------------|---|
| <u>Installation Options Page</u> | EO_PE_OPTIONS1 | Define portal installation options, including options that are specific to the collaborative workspace feature. |

Installation Options Page




Use the Installation Options page (EO_PE_OPTIONS1) to define portal installation options, including options that are specific to the collaborative workspace feature.

Navigation

Portal Administration, System Data, Installation Options

Image: Installation Options page

This example illustrates the fields and controls on the Installation Options page.

| Installation Options | Portal and Security Defaults | Last ID Values | Features |
|---|------------------------------|----------------|----------|
| <p>Select the Portal Solutions installation system options. The Image Attachment URL Path is used to dynamically look up where the content management image attachments are on the web server. This path is used to render the image. The maximum email notifications limits the number of notifications that can be sent.</p> | | | |
| Resource Finder | | | |
| <input checked="" type="checkbox"/> Enable Resource Finder <input type="checkbox"/> Use Resource Finder for Profile Pages | | | |
| Content Management  | | | |
| <p>*Image Attachment URL Path <input type="text" value="/ps/images/portal_pa/"/></p> <p>Default Poll <input type="text" value="DEF_RATINGS"/> </p> <p><input checked="" type="checkbox"/> Enable Content in WorkCenter <input checked="" type="checkbox"/> Auto-open attachment and URL</p> | | | |
| Discussion Forums | | | |
| <p>*Discussions Viewing Default <input type="text" value="Threaded View"/></p> <p><input checked="" type="checkbox"/> Site Specific</p> | | | |
| Collaborative Workspaces | | | |
| <p>Maximum Email Notifications <input type="text"/></p> <p>*Default Module Image <input type="text" value="PS_EPPCW_WELCOME_ICN"/> </p> <p><input type="checkbox"/> Default Presence Indicators in Members Module <input type="checkbox"/> Enable External Users</p> | | | |
| Calendar Events / Action Items | | | |
| <p>*Export Option <input type="text" value="Open Calendar Program"/></p> <p>*Alerts iCal Attachment <input type="text" value="No iCal attachment on Alerts"/></p> | | | |
| Work Week | | | |
| <p><input type="checkbox"/> Sun <input type="checkbox"/> Mon <input type="checkbox"/> Tue <input type="checkbox"/> Wed <input type="checkbox"/> Thu <input type="checkbox"/> Fri <input type="checkbox"/> Sat</p> | | | |
| iTracker | | | |
| <input type="checkbox"/> Enable Content Tracking | | | |

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

Other options on the Installation Options page are covered in the Portal and Site Administration

See "Defining Installation Options" (PeopleSoft Interaction Hub 9.1: Portal and Site Administration).

Resource Finder

Enable Resource Finder

Select this check box to use the Resource Finder feature.

Use Resource Finder for Profile Pages

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

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

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

See "Loading Participant User IDs" (PeopleSoft Interaction Hub 9.1: Resource Finder).

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

See [Using the Members Module](#).

Collaborative Workspaces

Maximum Email Notifications

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

If the number of email messages sent in the notification process exceeds this number, the system displays an error message and does not send any email messages.

Default Module Image

Select the name of the image you want to appear by default in the workspace menu to the left of a module name. If an image is defined for a module, then the system overrides this default image.

Default Presence Indicators in Members Module

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

See "Understanding Instant Messaging in PeopleSoft Interaction Hub" (PeopleSoft Interaction Hub 9.1: Portal and Site Administration).

Enable External Users

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

See [Administering Workspace Members](#).

Setting Up the Workspace Category Hierarchy

This section discusses ways to edit workspace categories and move categories to manage the workspace category hierarchy.

Pages Used to Set Up the Workspace Category Hierarchy

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|---|------------------------|--|
| Collaborative Workspace Category Hierarchy Page | EPPCW_MAINTCATG | Manage the hierarchy of categories used to organize workspace templates and workspaces. Also Delete Category link confirms or cancels the deletion of a category in the workspace category hierarchy. |
| Add Category Page | EPPCW_AE_CATEGORY | Add a category to the workspace category hierarchy. |
| Edit Category Page | EPPCW_AE_CATEGORY | Edit a category in the workspace category hierarchy. |
| Select Category Page | EPPCW_PARCATG_SEL | Use the Select Category page to move the current category in the category hierarchy. |

Understanding the Workspace Category Hierarchy

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

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

Collaborative Workspace Category Hierarchy Page

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

Image: Collaborative Workspace Category Hierarchy page

This example illustrates the fields and controls on the Collaborative Workspace Category Hierarchy page. You can find definitions for the fields and controls later on this page.

Collaborative Workspace Category Hierarchy
Manage the hierarchy of categories within which the collaborative workspaces are organized.

▼ **Top Category**

Category Name:

Description:

Left | Right

- Categories
 - Departments
 - Product Development
 - [QA]
 - [Software Development]
 - [Finance]
 - [HR]
 - [Marketing]
 - Products
 - [Enterprise Portal]
 - [HRMS]

[Add Category] [Edit Category] [Delete Category]

Save

Top Category

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

Category Name

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

Description

Enter a description of the top category. This field is for internal reference.



and

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



Indicates a category that does not contain any other categories.

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

Add Category

Click to access the Add Category page, where you can add a category to the selected category.

Edit Category

Click to access the Edit Category page, where you can edit the selected category.

Delete Category

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

Note: You cannot delete the top category, but you can rename it.

Adding and Editing Workspace Categories

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

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

Image: Edit Category page

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

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

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

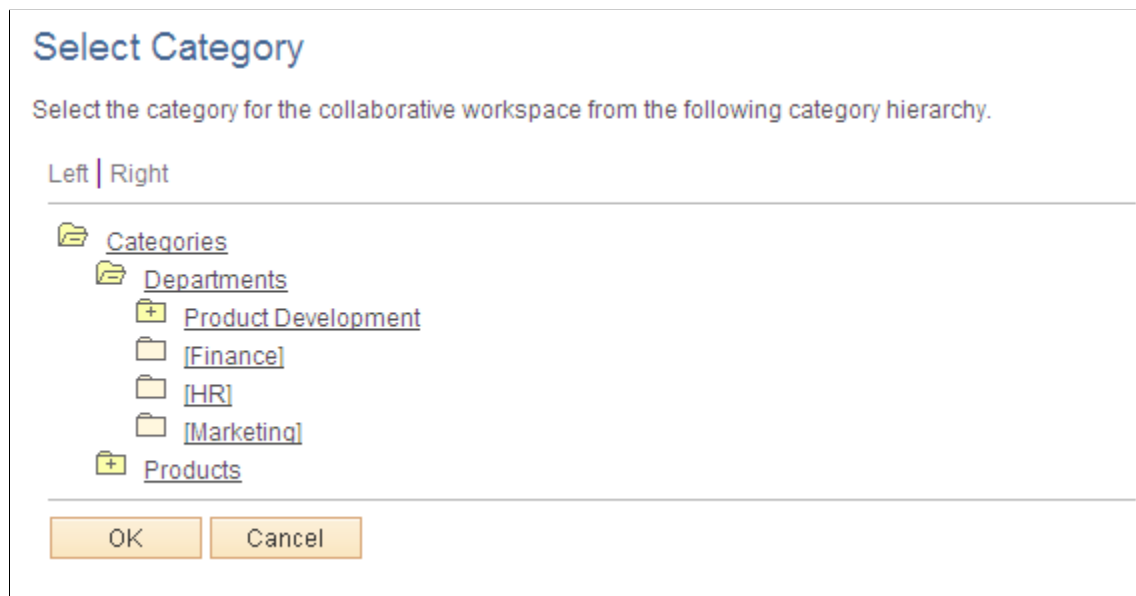
| | |
|----------------------|--|
| Category | Enter the name of the category. |
| Description | Enter a description for the category. |
| OK | Click to save your changes. |
| Cancel | Click to cancel any changes. |
| Move Category | Click to access the Select Category page to move this category to a new location in the hierarchy. |

Select Category Page

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

Image: Select Category page

This example illustrates the fields and controls on the Select Category page.



To use the Select Category page to move a category:

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

Setting Up Workspace Instant Messaging

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

See [Installation Options Page](#).

Related Links

"Understanding Instant Messaging in PeopleSoft Interaction Hub" (PeopleSoft Interaction Hub 9.1: Portal and Site Administration)

[Member Profile Page](#)

Setting Up Workspace Templates

This section discusses steps to create a workspace template, edit related properties to the template and define template security.

Pages Used to Set Up Workspace Templates

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|---|------------------------|--|
| Manage Templates Page | EPPCW_MANAGE | Browse and manage a list of workspace templates. |
| Create Workspace Template Page | EPPCW_TMPL_CREATE | Create a workspace template definition. See Creating Workspace Templates |
| Template Created Page | EPPCW_TMPL_COMPL | Access a new template by clicking the template name link. See Creating Workspace Templates |
| Administration - Properties Page | EPPCW_ADMIN_PROP | Set workspace template properties such as name, category, and branding theme. See Setting Workspace Template Properties |
| Administration Members Page | EPPCW_ADMIN_MBR | Manage the membership settings of a workspace template. |
| Administration Modules Page | EPPCW_ADMIN_MOD | Select the modules and pagelets that you want to include in a workspace template. See Selecting Template Modules |

| Page Name | Definition Name | Usage |
|--|------------------------|--|
| Key Name Mapping Page | EPPCW_ADMIN_KEYMAP | Select and optionally rename the keys passed to the pagelet. See Selecting Template Modules |
| Documents Module Properties Page | EPPCW_DC_CATGOPTS | Define options available in the Documents module of workspaces created using the template. |
| Add Pagelet Page | EPPPB_CP_ADD | Select a pagelet definition from a source portal and add it to a template. See Adding or Editing Related Pagelets in a Template |
| Edit Pagelet Page | EPPPB_CP_EDIT | Edit the definition for a related pagelet. See Adding or Editing Related Pagelets in a Template |
| Administration - Contextual Data Page | EPPCW_ADMIN_KEYS | Manage contextual data associated with a template. For example, you can enter data that ties the template to one or more transactions and to one or more transaction key fields. See Defining Contextual Data for Templates |
| Select Transaction Page | EPPCW_BROWSEREG | Select a transaction that you want to include as contextual data for a template. See Defining Contextual Data for Templates |
| Administration - Copy Changes Page | EPPCW_ADMIN_COPY | Copy selected items updated in the template to specified target workspaces, templates, or both. See Copying Changes from Templates |
| Modules Page, Related Pagelets Page, Link Details Page | EPPCW_ADM_COPY_DET | Select which modules, pagelets, or links will be copied to the target workspaces. See Copying Changes from Templates for more details on Modules page and Related Pagelets page |
| Administration Security Page | EPPCW_ADMIN_SEC | Manage security options for a template. |
| Workspace Administration Advanced Page | EPPCW_ADMIN_ADV | Access tools and utilities that enable you to implement advanced configurations for a workspace template. |

Understanding Workspace Templates

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

Three workspace templates are delivered with PeopleSoft Interaction Hub:

- Base workspace template

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

- Base workspace template wiki

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

- Demo workspace template

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

Note: This template exists in the Demo database only.

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

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

Manage Templates Page

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

Image: Manage Templates page

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

Manage Templates
Activate, deactivate or delete existing collaborative workspace templates.

Filter Templates

Category:

Owner:

Status: ☒ Active ☒ Inactive

Keyword:

| Templates | | | | |
|-------------------------------|------------------------------|----------|---------------------------|--------|
| Personalize Find View All | | | | |
| First 1-3 of 3 Last | | | | |
| Select | Template | Category | Owner | Status |
| <input type="checkbox"/> | Demo Workspace Template | | Vice President of Finance | Active |
| <input type="checkbox"/> | Base Workspace Template Wiki | | Vice President of Finance | Active |
| <input type="checkbox"/> | Base Workspace Template | | | Active |

Select All Clear All

Filter Templates

Category

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

Owner

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

Status

Select the Active check box or the Inactive check box to indicate the status of the workspace or template that you want to manage.

Keyword

Enter any keywords that you want to use to narrow your search results. The keywords you enter will be matched against any text that appears in the title (label) or description of a template.

Search

Click to perform your requested search.

Reset

Click to clear all keywords that you entered.

Templates

| | |
|-------------------|---|
| Select | Select a check box to indicate that you want to perform a managerial action on the workspace. |
| Template | Displays the name of the workspace template. Click the link to access the template. |
| Category | The system displays the category to which the template is assigned. |
| Owner | The system displays the name of the template owner. |
| Status | The system displays the status of the template, active or inactive. |
| Activate | Click to reactivate the selected template. |
| Deactivate | Click to deactivate the selected template. The template is no longer accessible or usable by members, but its data continues to be stored in your database. |
| Delete | Click to delete the selected template. You are prompted to confirm your deletion. |

Creating Workspace Templates

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

Image: Create Workspace Template page

This example illustrates the fields and controls on the Create Workspace Template page. You can find definitions for the fields and controls later on this page.

Create Workspace Template

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

*Name:

Description:

| | |
|-------------|--|
| Name | Enter a name for the template. This name becomes an available value in the Template field on the Select a Workspace Template page. |
|-------------|--|

| | |
|-------------|--|
| Description | Enter a description of the template. The system displays this description when the template is selected on the Select a Workspace Template page. |
| Save | Click to create and save the template definition. After the save is complete, the system takes you to the Template Created page. |

Accessing the Newly Created Template

After you save a new template, the system takes you to the Template Created page, where you click the template name link to display the administration pages for the new template.

Working With Templates and the Action Item Lists Module

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

Setting Workspace Template Properties

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

Image: Administration - Properties page (workspace template)

This example illustrates the fields and controls on the Administration - Properties page for a workspace template. You can find definitions for the fields and controls later on this page.

PropertiesMembersModulesContextual DataCopy ChangesSecurityAdvanced

*Name:

Base Workspace Template

Description:

The base template used for Collaborative Workspaces, this template contains a customized menu as well as all available collaborative modules, including a welcome tab, related data tab, members and administration components

Category:

☒ Allow category override

Theme Name

PAPPBR_THEME_CW_TANGERINE

Save

| | |
|-------------------------|---|
| Name | The template name you entered on the Create Workspace Template page appears, but you can override it. This name becomes an available value in the Template field on the Select a Workspace Template page. |
| Description | Enter a description of the template. This description appears when the template is selected on the Select a Workspace Template page. |
| Category | Select a category for the workspace template. This category appears by default on the Name and Describe Workspace page for a workspace created using this template. |
| Allow category override | Select to override the selected category on individual workspaces created using this template. You perform this override on the Name and Describe Workspace page. |

Theme Name

Displays the branding theme that will be used to display workspaces created using this template. This field is editable for template owners and administrators.

Note: All branding themes defined in the system are available for selection; however, only certain themes are applicable to collaborative workspaces.

Related Links

"Themes, Headers, and Skins" (PeopleSoft Interaction Hub 9.1: Branding)

[Setting Up the Workspace Category Hierarchy](#)

Administration Members Page

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

Image: Administration - Members page

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

The screenshot shows the 'Administration - Members' page with the 'Feed' tab selected. The page title is 'Workspace Feeds' and the sub-header is 'Publish as Feed'. A message states: 'Review, edit or add feed definitions for this item. Only feed definitions published in the current site are marked as published and can be edited.' Below this is a table titled 'Feed Definitions' with the following data:

| Feed Title | Published | |
|------------------|-------------------------------------|-------------|
| 1 Demo Workspace | <input checked="" type="checkbox"/> | Edit Delete |

At the bottom of the page, there are buttons for 'Add Feed' and 'Save'.

See [Workspace Administration Advanced Page](#).

Members

Use the Members group box to manage the membership settings of the workspace template. The system provides these settings by default to the workspaces that are created using this template.

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

See [Add Members \(Optional\) Page](#).

Type

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

Available values include:

Role: Select to enable selecting a role or a group of users in the Member Name field. Available roles are defined in the Roles component.

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

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

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

Privilege Set

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

Administrator:

Approver:

Contributor:

Moderator:

Owner:

Viewer:

See [Understanding Workspace Privilege Sets](#).



Click to view information about the privilege set.

Selecting Template Modules

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

Image: Administration - Modules page

This example illustrates the fields and controls on the Administration - Modules page.

Select which modules you would like for this workspace.

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

[Add Related Pagelet](#)

[Save](#)

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

The system provides these settings by default to the workspaces that are created using this template. The Welcome, Members, and Administration module names are selected and unavailable for editing because they are required in a workspace.

The [Properties](#) link associated with a module enables you to further define the properties and options available in a module.

Mapping Keys for Context-Sensitive Pagelets

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

Image: Key Name Mapping page

This example illustrates the fields and controls on the Key Name Mapping page.

Key Name Mapping

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

Menu Item Label:

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

When you add a related pagelet to a workspace and designate it as being context-sensitive, the pagelet is passed the same key names and values that are associated with the workspace. These keys are passed to the pagelet as query string parameters. You can override the key names for a related pagelet by adding the EPPCW_KEYMAPPING attribute to the content reference representing the pagelet.

You access the content reference of the pagelet by clicking the Structure and Content link on the Administration - Advanced page. The syntax for the attribute value is:

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

Related Links

"Using PeopleSoft Interaction Hub Content Reference Attributes" (PeopleSoft Interaction Hub 9.1: Portal and Site Administration)

[Workspace Administration Advanced Page](#)

Documents Module Properties Page

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

Image: Documents Module Properties page

This example illustrates the fields and controls on the Documents Module Properties page. You can find definitions for the fields and controls later on this page.

Documents Module Properties

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

☒ Enable Content Versions

☐ Enable Content Checkout

☐ Enable Content Approval ☐ Cascade to All Child Folders

Enable Content Types to Add

☒ File Attachment

☒ Text or HTML

☒ Managed Content

OK

Enable Content Versions

Select to enable different versions of content.

Enable Content Checkout

Select to enable the check in and check out of documents posted to the Documents module in workspaces created using this template. If you select this option, fields and options enabling the check in and check out of documents appear appropriately on the pages used to post documents to the Documents module.

Enable Content Approval

Select to enable the approval of documents posted to the Documents module in workspaces created using this template. If you select this option, fields and options enabling the approval of documents appear appropriately on the pages used to post documents to the Documents module.

Cascade to All Child Folders

Select to set the default approvals for all new content in child folders. The approval settings are transferred to all child folders when the page is saved. This setting does not affect existing child content approval settings.

Enable Content Types to Add

File Attachment

Select to enable the posting of file attachments to the Documents module in workspaces created using this template. If you select this option, the *File Attachment* option appears on the Documents - Add Documents page in the Documents module.

Note: If file attachments are added to the template itself, these attachments will not appear in workspaces created from the template.

Text or HTML

Select to enable the posting of text and HTML documents to the Documents module in workspaces created using this template. If you select this option, the *Text or HTML* option appears on the Documents - Add Documents page in the Documents module.

Managed Content

Select to enable the posting of managed content to the Documents module in workspaces created using this template. If you select this option, the *Managed Content* option appears on the Documents - Add Documents page in the Documents module.

Adding or Editing Related Pagelets in a Template

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

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

Image: Add Pagelet page

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

Add Pagelet

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

*Source Application: EMPLOYEE Portal


*Pagelet Folder: Organizers

*Pagelet Name: My Feeds

Pagelet

*Pagelet ID: PAPP_EPPFP_MY_FEEDS_SCR

*Pagelet Title: My Feeds

Description: 

*Pagelet Folder: PeopleSoft Applications

Pagelet Security

☐ Publish as Public

☒ Publish with Security Roles ☐ Author Access

| Selected Security | | |
|-------------------|----------|-----------------------------|
| *Type | Name | Description |
| Permission List | PAPP0002 | Logged in User Access |
| Permission List | PAPP9000 | All Interaction Hub Objects |

Workspace Tabs

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

Save Cancel Preview Pagelet

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

Source Application

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

To select the portal registry from the node of a content provider system, that node must already be defined as a source application.

See "Defining Source Application Page" (PeopleSoft Interaction Hub 9.1: Portal and Site Administration).

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

Defining Contextual Data for Templates

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

Image: Administration - Contextual Data page

This example illustrates the fields and controls on the Administration - Contextual Data page. You can find definitions for the fields and controls later on this page.

| Display | Record Name | Key | Custom Label | Value |
|-------------------------------------|-----------------|--------------------|---------------|------------|
| <input type="checkbox"/> | EO_PE_DEMO_DEPT | EO_PE_DEMO_DEPTID | Department ID | FACILITIES |
| <input checked="" type="checkbox"/> | EO_PE_DEMO_DEPT | EO_PE_DEMO_DEPTLBL | Department | Facilities |

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

Type

Select the type of transaction you want to associate with the template.

Not Registered: Select to associate the template with a transaction that is not registered in the PeopleSoft database environment. When you select this value, the Node Name, URL, and Label fields appear.

Registered: Select to associate the template with a transaction that is registered in the PeopleSoft database environment. When you select this value, the Portal / Subsite and Transaction Name fields appear.

Portal / Subsite

Select the portal or subsite in which the internal transaction to which you want to tie this template resides. This field appears when the Type field is set to *Registered*.

Transaction Name

Enter one or more internal transactions to which you want to associate this template. This field appears when the Type field is set to *Registered*.

Click the Select Transaction button to access the Select Transaction page, where you can select a transaction from a graphical representation of the portal registry.

Component Interface

Select a component interface to update the template with the key values of the transaction you are working with in Step 2 of the wizard. Any component interface that has the GET tied to the component will update the template and, when you create the workspace using that template, the prompt will show the key values for you to select.

| | |
|--|---|
| | This field appears when the Type field is set to <i>Registered</i> . |
| Node Name | Select the node through which the external transaction to which you want to associate this template should be accessed. These nodes are defined content providers from which content can be retrieved and rendered. This field appears when the Type field is set to <i>Not Registered</i> . |
| URL | Enter the URL to the external transaction to which you want to associate this template. This field appears when the Type field is set to <i>Not Registered</i> . |
| Label | <p>Enter the label that you want to appear for an unregistered transaction. This field appears when the Type field is set to <i>Not Registered</i>.</p> <p>Label text that you enter here appears in the Relate Workspace to a Transaction page when the keys edit boxes are presented and in the workspace menu, below module choices to the left.</p> |
| Only for selected transactions | Select if you want this template to be available for selection only when a user chooses to create workspaces from the related transactions you define on this page. When a user creates a workspace based on any other transaction, this template will not be available for selection. |
| <p>Use the Related Keys group box to specify key fields that you want to associate with this template. When you build a workspace using this template and associate it with a transaction that contains these key fields, the workspace is able to display pagelets and links related to the key field values from the transaction.</p> <hr/> <p>Note: Modifying existing field values or options set in this group box initiates a function that updates all workspace pagelet content reference URLs that contain an attribute of EPPCW_PAGELET with a value of KEYS. This change affects all workspace pagelets as well as any related pagelets associated with the workspace in which the key was modified.</p> <hr/> | |
| Display | Select if you want the key field and its transactional value to appear in a workspace created from this template using a transaction that contains the key field. Deselect this option to hide certain keys and their values from workspace users. |
| Record Name | Select the record name that you want to use to associate with the workspace template. |
| Key | <p>Enter the key field name that you want to associate with the workspace template.</p> <p>These keys and their values can be used to generate context-sensitive Related Pagelets and links that are specific to the workspace created from this template.</p> |
| Custom Label | Enter an overriding value for the key label. If you choose to display the key, this label will appear alongside the key field |

value below the menu of a workspace created from this template for a transaction that contains the key.

Allow key overrides

Select if you want an administrator to be able to edit these keys in a workspace created using this template.

Selecting Transactions for a Template

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

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

Image: Select Transaction page

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

Select Transaction

Portal / Subsite: EMPLOYEE

Search

Left | Right

- Root
 - My Favorites
 - Test
 - Enterprise Components
 - PeopleSoft
 - My Content
 - Content Management
 - Investor Portal
 - Internal Controls Enforcer
 - Portal Administration
 - Worklist
 - Application Diagnostics
 - Tree Manager
 - Reporting Tools
 - PeopleTools
 - Packaging
 - [DemoSite Home]
 - [Take a Survey]
 - [Browse Workspaces]
 - [My Account Sign On]
 - [My Instant Messaging]
 - [Usage Monitoring]
 - [Change My Password]
 - [My Personalizations]
 - [My System Profile]
 - [My Dictionary]
 - [My Feeds]

Cancel

Portal / Subsite

Displays the portal or subsite you selected on the Administration - Contextual Data page, but you can override this value. Select the portal in which the transaction you want to associate to the template resides.

Search by*Description.**Label.***Search**

Click to execute the search you entered using the Search by elements.

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

Copying Changes from Templates

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

Image: Administration - Copy Changes page

This example illustrates the fields and controls on the Administration - Copy Changes page. You can find definitions for the fields and controls later on this page.

| Properties | Members | Modules | Contextual Data | Copy Changes | Security | Advanced | | | | | | | | | | | | | | | | | | | | |
|--|---|-------------------------------------|---|--------------------------|----------|----------|----------------|-------------|---------|---------------------------|---------|---|-------------------------------------|-------------------------|---|---|--------------------------|--|----------------|--|-------------------------------------|-------------------------|-------|--|---|--------------------------|
| Copy selected items updated in this template to specified target(s). | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <div>Items to Copy</div> <table border="1"> <thead> <tr> <th>Name</th> <th>Description</th> <th>Copy</th> <th>Details</th> </tr> </thead> <tbody> <tr> <td>Modules</td> <td>The collaborative module links of the workspace (i.e., Documents, Discussions, etc.). Data is excluded.</td> <td><input checked="" type="checkbox"/></td> <td>Details</td> </tr> <tr> <td>Related Pagelets</td> <td>The pagelets added and assigned to either the Related Data tab or the Welcome tab. These can be contextualized to the workspace keys.</td> <td><input type="checkbox"/></td> <td></td> </tr> <tr> <td>Branding Theme</td> <td>The default branding theme selection and allowable overrides</td> <td><input checked="" type="checkbox"/></td> <td></td> </tr> <tr> <td>Links</td> <td>The internal or external top-level links created within the Links module of the workspace.</td> <td><input type="checkbox"/></td> <td></td> </tr> </tbody> </table> | | | | | | | Name | Description | Copy | Details | Modules | The collaborative module links of the workspace (i.e., Documents, Discussions, etc.). Data is excluded. | <input checked="" type="checkbox"/> | Details | Related Pagelets | The pagelets added and assigned to either the Related Data tab or the Welcome tab. These can be contextualized to the workspace keys. | <input type="checkbox"/> | | Branding Theme | The default branding theme selection and allowable overrides | <input checked="" type="checkbox"/> | | Links | The internal or external top-level links created within the Links module of the workspace. | <input type="checkbox"/> | |
| Name | Description | Copy | Details | | | | | | | | | | | | | | | | | | | | | | | |
| Modules | The collaborative module links of the workspace (i.e., Documents, Discussions, etc.). Data is excluded. | <input checked="" type="checkbox"/> | Details | | | | | | | | | | | | | | | | | | | | | | | |
| Related Pagelets | The pagelets added and assigned to either the Related Data tab or the Welcome tab. These can be contextualized to the workspace keys. | <input type="checkbox"/> | | | | | | | | | | | | | | | | | | | | | | | | |
| Branding Theme | The default branding theme selection and allowable overrides | <input checked="" type="checkbox"/> | | | | | | | | | | | | | | | | | | | | | | | | |
| Links | The internal or external top-level links created within the Links module of the workspace. | <input type="checkbox"/> | | | | | | | | | | | | | | | | | | | | | | | | |
| <div> <div>Target Workspaces</div> <div>Find View All </div> <div>First 1-3 of 3 Last</div> <table border="1"> <thead> <tr> <th>Workspace Name</th> <th>Description</th> <th>Created</th> <th>Vice President of Finance</th> <th>Select</th> </tr> </thead> <tbody> <tr> <td>Demo workspace</td> <td></td> <td>11/18/2004</td> <td>Vice President of Finance</td> <td><input type="checkbox"/></td> </tr> <tr> <td>Anniversary Celebration</td> <td></td> <td>02/20/2013</td> <td>Vice President of Finance</td> <td><input type="checkbox"/></td> </tr> <tr> <td>Anniversary Celebration</td> <td></td> <td>02/20/2013</td> <td>Vice President of Finance</td> <td><input type="checkbox"/></td> </tr> </tbody> </table> <div> <input checked="" type="checkbox"/> Select All <input type="checkbox"/> Clear All </div> </div> | | | | | | | Workspace Name | Description | Created | Vice President of Finance | Select | Demo workspace | | 11/18/2004 | Vice President of Finance | <input type="checkbox"/> | Anniversary Celebration | | 02/20/2013 | Vice President of Finance | <input type="checkbox"/> | Anniversary Celebration | | 02/20/2013 | Vice President of Finance | <input type="checkbox"/> |
| Workspace Name | Description | Created | Vice President of Finance | Select | | | | | | | | | | | | | | | | | | | | | | |
| Demo workspace | | 11/18/2004 | Vice President of Finance | <input type="checkbox"/> | | | | | | | | | | | | | | | | | | | | | | |
| Anniversary Celebration | | 02/20/2013 | Vice President of Finance | <input type="checkbox"/> | | | | | | | | | | | | | | | | | | | | | | |
| Anniversary Celebration | | 02/20/2013 | Vice President of Finance | <input type="checkbox"/> | | | | | | | | | | | | | | | | | | | | | | |
| <div>Copy Notification</div> <div> <input type="checkbox"/> Notify Owners When Copying </div> | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <div>Copy Changes</div> | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <div>Save</div> | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Properties Members Modules Contextual Data Copy Changes Security Advanced | | | | | | | | | | | | | | | | | | | | | | | | | | |

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

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

Items to Copy

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

| | |
|-------------------------|---|
| Modules | You can select to copy all modules or only ones selected on the Modules page by clicking the Details link. |
| Related Pagelets | You can copy pagelets from the Related Pagelets module. Click the Details link to view the Related Pagelets page. |
| Branding Theme | Select this check box to copy template's branding theme. |
| Links | Select this option to copy internal or external links. |

Target Workspaces

This region of the page lists all workspaces that have been generated using this template. Select the ones to which you want to copy the changes.

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

Copy Notification

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

Determining Which Items to Copy

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

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

Image: Module Details page

This example illustrates the fields and controls on the Module Details page.

Properties Members **Modules** Contextual Data Feed Advanced

Select which modules you would like for this workspace.

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

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

Image: Related Pagelets page

This example illustrates the Related Pagelets page.

| Related Pagelets | | | | |
|---------------------|-------------------------|-------------------------------------|----------|--|
| Name | Menu Item Label | Context-Sensitive | Map Keys | |
| PAPP_EPPCW_DEMO_SCR | Demo Contextual Pagelet | <input checked="" type="checkbox"/> | Map | Edit Pagelet  |

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

Administration Security Page

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

Image: Administration - Security page

This example shows Administration Security page.

Security Options

Anyone Can Use This Template

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

Only Selected Users & Roles

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

Users/Roles

The Users/Roles group box appears when you select the Only Selected Users & Roles option.

Type

Select the type of member you want to be able to access this workspace template. Available values include:

- *Role*: Select to be able to select a role or group of users in the Member Name field. You define available roles 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. You define available users in the User Profiles component.

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

Workspace Administration Advanced Page

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

Image: Administration - Advanced page

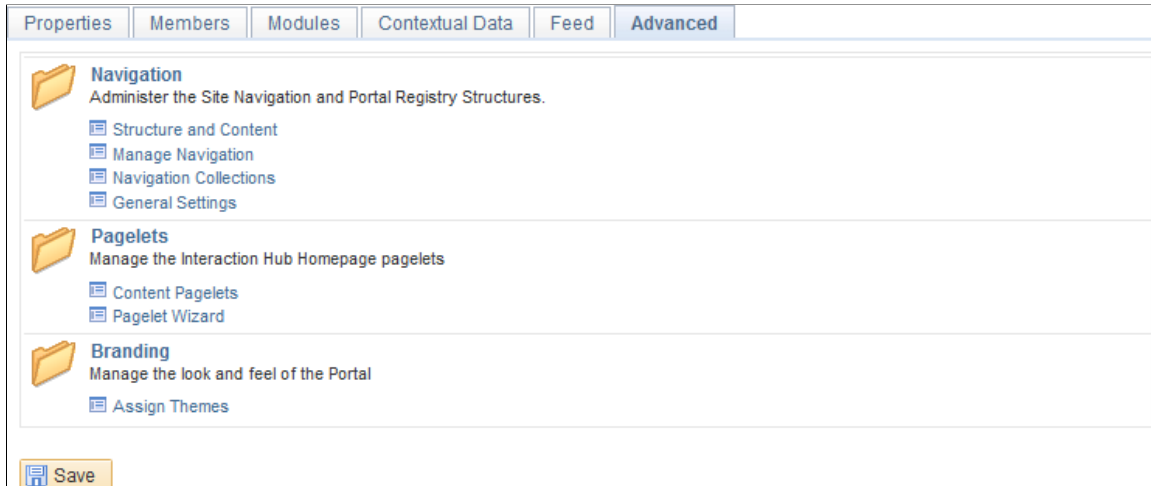


Image: Administration - Advanced page (workspace template)

This example illustrates the fields and controls on the Administration - Advanced page for a workspace template. You can find definitions for the fields and controls later on this page.



Navigation

Access utilities and tools that enable you to implement advanced navigation configurations for the workspace template. Add new modules to the workspace or access Pagelet Wizard to create new pagelets for use with the workspace.

See "Managing Site Navigation" (PeopleSoft Interaction Hub 9.1: Portal and Site Administration).

See the product documentation for *PeopleTools: Portal Technology*, "Administering Portals."

Pagelets

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

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

Branding

Access utilities and tools that enable you to change branding theme assignments for the template.

See "Themes, Headers, and Skins" (PeopleSoft Interaction Hub 9.1: Branding). In addition, see *PeopleTools: Portal Technology*, “Using PeopleTools Branding Features,” Administering System Branding, Assigning Branding Themes.

Importing and Exporting Template Data

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

See My Oracle Support, Knowledge, Portal Solutions, PeopleSoft Interaction Hub.

Creating Collaborative Workspaces

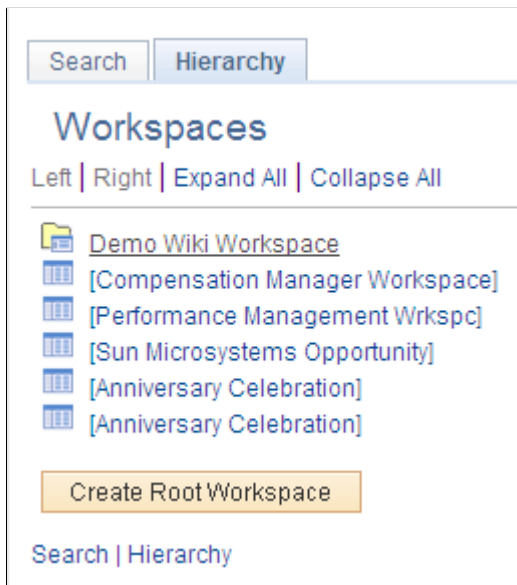
Understanding Workspace Creation

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

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

Image: Example of root-level workspaces and child workspaces

This example illustrates the fields and controls on the Example of root-level workspaces and child workspaces.



You can create and update collaborative workspaces in batch mode. When you create or update workspaces in batch mode, you specify the workspace attributes to create or update in XML following the specifications of the workspace DTD.

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

- Workspaces - Search page

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

- Workspaces - Hierarchy page

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

- Create Workspace menu item

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

- My Workspaces pagelet

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

- Batch Create Workspaces page

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

- Related Links service

If you added the Related Links related content service to the transaction page, you can create workspaces directly from the PeopleSoft application transaction for which you are creating the workspace.

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

- The workspace automatically includes a link back to the PeopleSoft application transaction in the Links module.
- If the option is selected when the workspace is created, the workspace can include discussions related to the PeopleSoft application transaction.

- Related Workspaces pagelet

If you assigned the Related Workspaces pagelet to the transaction page using Context Manager, you can create workspaces directly from the transaction for which you are creating the workspace.

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

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

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

Related Links

My Workspaces Page

"Creating and Using Links with the Related Links Service" (PeopleSoft Interaction Hub 9.1: Using Portal Features)

"Working With the Related Workspaces Pagelet" (PeopleSoft Interaction Hub 9.1: Using Portal Features)
Using the Browse Workspaces Module

Creating Root-Level Workspaces

This section discusses the workspace creation wizard to create root-level workspaces.

Pages Used to Create Root-Level Workspaces

| Page Name | Definition Name | Usage |
|---|------------------------|---|
| <u>Select A Workspace Template Page</u> | EPPCW_WIZ_TMPL | Select the template on which you want to base the new workspace. |
| <u>Relate Workspace to a Transaction Page</u> | EPPCW_WIZ_KEYS | If the workspace template on which you are basing the creation of your workspace contains contextual data, you can use this page to relate the workspace to specific data about a transaction; otherwise, the system skips this page during workspace creation. |
| <u>Name and Describe Workspace Page</u> | EPPCW_WIZ_DESCR | Enter a name, description, and category to help identify the workspace. |
| <u>Select Workspace Modules Page</u> | EPPCW_WIZ_MOD | Select the modules you want to include in the workspace. |
| <u>Add Members (Optional) Page</u> | EPPCW_WIZ_MBR | Select and invite members to participate in the new workspace. |
| <u>Create User Account Page</u> | EPPCW_WIZ_EXTMBR | Create a system account and ID to allow an external user to access this workspace. |

Select A Workspace Template Page

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

Image: Select A Workspace Template page

This example illustrates the fields and controls on the Select A Workspace Template page. You can find definitions for the fields and controls later on this page.

Create A Collaborative Workspace Step 1 of 5

1 — 2 — 3 — 4 — 5 Next >

Select A Workspace Template

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

Template:

Description: Demonstration workspace template used to create workspace instances

Contextual Data: Department ID, Department

Template

Select the template on which you want to base your workspace.

If you accessed this wizard directly from the transaction for which you are building this workspace and the transaction is already associated with a workspace template, then the system selects a recommended template by default. You can override this template.

Description

The system displays a description of the selected template.

Contextual Data

If you selected a template and contextual data is already defined for the template, then the labels of the key fields selected to supply contextual data appear here.

Related Links

[Creating Workspace Templates](#)

Relate Workspace to a Transaction Page

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

Image: Relate Workspace to a Transaction page

This example illustrates the fields and controls on the Relate Workspace to a Transaction page.

Create A Collaborative Workspace Step 2 of 5

1 — 2 — 3 — 4 — 5 < Previous Next >

Relate Workspace to a Transaction

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

Contextual Data

Department 🔍

Note: If no contextual data is required for this workspace, then the system skips this step and displays Step 3 automatically.

Contextual Data

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

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

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

Related Links

[Defining Contextual Data for Templates](#)

Name and Describe Workspace Page

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

Image: Name and Describe Workspace page

This example illustrates the fields and controls on the Name and Describe Workspace page. You can find definitions for the fields and controls later on this page.

Create A Collaborative Workspace Step 3 of 5

1 — 2 — 3 — 4 — 5 < Previous Next >

Name and Describe Workspace

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

*Name:

Description:

Category:

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, the name can appear on pages used to search for or manage workspaces, in pagelets, in search results, and so on.

Description

Enter an optional description for the workspace.

This description becomes the default welcome text, which appears in the Welcome module if that module is configured for this workspace.

Category

Select a category for the workspace.

If a category is defined for the workspace template, then the category appears by default. You can select a different category if the template definition specifies that the category can be overridden.

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

Related Links

[Administering the Workspace Properties Page](#)

Select Workspace Modules Page

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

Image: Select Workspace Modules page

This example illustrates the fields and controls on the Select Workspace Modules page.

Create A Collaborative Workspace Step 4 of 5

1 — 2 — 3 — 4 — 5 < Previous Next >

Select Workspace Modules

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

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

Cancel

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

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

You can also use the Administration - Modules page, which you access from the workspace, to add and remove workspace modules.

Related Links

[Administering Workspace Modules](#)

Add Members (Optional) Page

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

Image: Add Members (Optional) page

This example illustrates the fields and controls on the Add Members (Optional) page.

Create A Collaborative Workspace Step 5 of 5

1 — 2 — 3 — 4 — 5 < Previous Finish

Add Members (Optional)

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

| Send Invite | *Type | *Member Name | *Privilege Set | |
|-------------------------------------|-------|--------------|----------------|--------|
| <input checked="" type="checkbox"/> | User | VP1 | Owner | Delete |

Select All Clear All

Add Workspace Member

Cancel

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

See [Administering Workspace Members](#).

Members

Send Invite

Select to send a notification to selected members alerting them that they were added as members to the workspace. The system uses default notification text that includes a link to the workspace homepage. Alternatively, you can send notifications after the workspace is created, which also allows you to modify the notification text on the Set Invitation Message page.

See [Setting Up a Workspace](#).

Type

Select the type of member you want to add to the workspace.

To be able to select *Administrator* or *Owner* in the Privilege Set field, you must select the *User* value here.

Available values include:

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

See 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 on the User Profiles page.

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

Member Name

Select a name from the list of roles or users.

Privilege Set

Select a privilege level you want to assign to the member. To be able to assign the *Administrator* or *Owner* privilege level to a member, you must have selected *User* in the Type field. Available values are:

Administrator

Approver

Contributor

Moderator

Owner

Viewer

See [Understanding Workspace Privilege Sets](#).

Add Workspace Member

Click to add another member to the workspace.

Create User Account

Click to access the Create User Account page, which enables you to enter a new user name and email account for an external member.

Note: The Create User Account button appears only if the Enable External Users option is set on the Installation Options page.

See [Installation Options Page](#).

Finish

Click to finish workspace creation and access the workspace homepage.

Create User Account Page

Access the Create User Account page.

Image: Create User Account page

This example illustrates the fields and controls on the Create User Account page. You can find definitions for the fields and controls later on this page.

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

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

You can access and manage external user information from the Manage External User page.

See [Managing External User Accounts for Workspaces](#).

Creating Child Workspaces

This section discusses how to create a child workspace.

Page Used to Create Child Workspaces

| Page Name | Definition Name | Usage |
|-----------------------------|-----------------|--|
| Create Child Workspace Page | EPPCW_WS_CREATE | Create a child workspace of the selected parent. |

Create Child Workspace Page

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

Image: Create Child Workspace page

This example illustrates the fields and controls on the Create Child Workspace page. You can find definitions for the fields and controls later on this page.

Create Child Workspace

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

*Name:

Description:

Template:

Copy Members Option

☒ Copy From the Workspace

☐ Copy From the Template

☐ Do Not Copy Members

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

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

Creating and Updating Workspaces in Batch Mode

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

Pages Used to Create and Update Workspaces in Batch Mode

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|------------------------------|-------------------------------|---|
| Batch Create Workspaces Page | EPPCW_IMPORT_RUN | <p>Specify the XML and other parameters for the workspace batch process.</p> <p>See Running the Process to Create and Update Workspaces in Batch Mode</p> |

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|-------------------------------------|-------------------------------|--|
| Document Type Definition (DTD) Page | EPPCW_IMPRTDTD_SBP | Review the DTD that provides the specification for the XML for the workspace batch process. See <u>Running the Process to Create and Update Workspaces in Batch Mode</u> |
| Sample XML File Page | EPPCW_IMPRTXML_SBP | View example XML that can be copied and modified to be the input to the workspace batch process. See <u>Running the Process to Create and Update Workspaces in Batch Mode</u> |

Running the Process to Create and Update Workspaces in Batch Mode

This section discusses how to:

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

Batch Create Workspaces Page

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

Image: Batch Create Workspaces page

This example illustrates the fields and controls on the Batch Create Workspaces page. You can find definitions for the fields and controls later on this page.

Batch Create Workspaces

[Report Manager](#) [Process Monitor](#)

[Run / Schedule](#)

Run Control ID: Test

User ID: VP1

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

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

[Select File](#)

☐ Notify Workspace Owners

[Save](#) [Add](#)

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

Report Manager

Click to access the Report Manager module to view report results.

See the product documentation for *PeopleTools: Process Scheduler*, “Using Report Manager.”

Process Monitor

Click to access the Process Monitor to view the status of job requests.

See the product documentation for *PeopleTools: Process Scheduler*, “Using Process Monitor.”

Run / Schedule

Click to schedule and run this process.

Process Scheduler runs the EPPCW_IMPORT process at the user-defined time.

See the product documentation for *PeopleTools: Process Scheduler* “Submitting and Scheduling Process Requests.”

View Document Type Definition (DTD)

Click to review the DTD that provides the XML specifications for the workspace batch process.

View Sample XML File

View example XML that demonstrates how to create and update workspaces.

Copy and modify this XML to be the input to the workspace batch process. Save the XML as a file, or paste the modified XML directly into the text box.

Select File

Click to browse to a local file that you want to use to create or modify workspaces in batch mode.

Upload

Insert the XML that defines the workspaces to be created or updated.

Notify Workspace Owners

Select this check box to send an email to the owner of each workspace indicating that the workspace was created or modified.

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

Reviewing the DTD

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

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

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

```
<!ELEMENT keyshow (#CDATA)>
<!ATTLIST workspace mode (ADD|UPDATE)>
]>
```

Viewing the Example XML

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

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

Modifying XML Attributes for Workspace Creation and Updating

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

The workspace DTD specifies the following XML elements:

| | |
|-------------------------------|--|
| <workspaces> | Requires at least one <workspace> element. |
| <workspace> | Each <workspace> element corresponds to a workspace and has two attributes: <ul style="list-style-type: none"> • title = Enter the name of the workspace. This attribute is required for ADD mode only. • mode= Enter <i>ADD</i> or <i>UPDATE</i>. If you are updating the workspace, then the portal name becomes a required attribute. |
| <portalname> | Enter the name of the portal. This attribute is required for UPDATE mode only. |
| <description> | Optional attribute. Enter a text string describing the workspace. |
| <welcometext> | Optional attribute. Enter text that you want to appear as a welcome message in the Welcome pagelet. |
| <invitationtext> | Optional attribute. Enter the text that is sent out in an email as an invitation to participate in the workspace. |
| <category> | Optional attribute. Enter the name of the category you want to assign to the workspace. |
| <template> | Optional attribute. Enter the template name for the workspace. |
| <validfrom> | Optional attribute. Enter the date that the workspace becomes valid. |

| | |
|------------------------|---|
| <validto> | Optional attribute. Enter the date that the workspace is no longer valid. |
| <members> | Each <workspace> element requires a <members> element, which in turn requires at least one <member> element. |
| <member> | <p>Each <member> element corresponds to a workspace member and has three required elements:</p> <ul style="list-style-type: none"> • <name> Displays the user ID or role name of the workspace member. • <type> Enter <i>USER</i> or <i>ROLE</i>. • <privilege> Enter one of the following values: <ul style="list-style-type: none"> • <i>EPPCW_OWNER</i> • <i>EPPCW_ADMIN</i> • <i>EPPCW_APPROVER</i> • <i>EPPCW_VIEWER</i> • <i>EPPCW_MODERATOR</i> • <i>EPPCW_VIEWER</i> |
| <keys> | The <keys> element is optional and is only valid when the workspace template defines contextual keys. If used, you must define at least one <key> element. |
| <key> | <p>Each <key> element corresponds to a contextual data key for the workspace and has four required elements:</p> <ul style="list-style-type: none"> • <recname> Displays the name of the record name. • <keyname> Displays the name of the contextual data key. • <keyvalue> Displays the value of the contextual key. • <keydescr> Displays the custom label for the contextual data key. • <keyshow> |

Enter *Y* or *N* to indicate whether the key appears in the workspace menu on the homepage.

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

Administering Collaborative Workspaces

Understanding Workspace Administration

In Oracle's PeopleSoft Interaction Hub, workspace administration tasks occur inside and outside of the workspace itself. These topics covers both types of activities.

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

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

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

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

Understanding Workspace Privilege Sets

This section provides an overview of workspace privileges and discusses:

- Welcome module privilege
- Wiki Content module privileges
- Discussions module privileges
- Documents module privileges
- Blogs module privileges
- Links module privileges
- Action Item Lists module privileges
- Calendar module privileges
- Members module privileges

- Related Data module privileges
- Polls module privileges
- Browse Workspaces module privileges
- Administration module privileges

Workspace Privileges

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

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

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

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

Welcome Module Privilege

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

| <i>Privilege</i> | <i>Privilege Set</i> |
|-----------------------------------|-----------------------------|
| Change layout and modify content. | Owner, Administrator |

Wiki Content Module Privileges

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

| <i>Privilege</i> | <i>Privilege Set</i> |
|--------------------------|--|
| Contribute wiki content. | Owner, Administrator, Approver, Moderator, Contributor |
| View wiki content. | Owner, Administrator, Approver, Moderator, Contributor, Viewer |

Discussions Module Privileges

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

| <i>Privilege</i> | <i>Privilege Set</i> |
|--|--|
| Add and delete topics (individual). | Owner, Administrator, Moderator, Contributor |
| Add and delete responses (individual). | Owner, Administrator, Moderator, Contributor |
| Add and delete topics (all). | Owner, Administrator, Moderator |
| Add and delete responses (all). | Owner, Administrator, Moderator |
| View topics and responses. | Owner, Administrator, Moderator, Contributor, Viewer |

Documents Module Privileges

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

| <i>Privilege</i> | <i>Privilege Set</i> |
|-----------------------------------|--|
| Add and delete pieces of content. | Owner, Administrator, Approver, Moderator, Contributor |
| Add and delete folders. | Owner, Administrator, Approver, Moderator, Contributor |
| View hierarchy and content. | Owner, Administrator, Approver, Moderator, Contributor, Viewer |
| Approve content. | Owner, Administrator, Approver |

Blogs Module Privileges

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

| <i>Privilege</i> | <i>Privilege Set</i> |
|---------------------------|--|
| Manage blog. | Owner, Administrator, Moderator |
| Add blog posts. | Owner, Administrator, Approver, Moderator, Contributor |
| Add comments and replies. | Owner, Administrator, Approver, Moderator, Contributor |
| View blog posts. | Owner, Administrator, Approver, Moderator, Contributor, Viewer |

Links Module Privileges

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

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

Action Item Lists Module Privileges

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

| Privilege | Privilege Set |
|-------------------------------|--|
| Add and edit any action item. | Owner, Moderator, Administrator, Contributor, Approver |
| Delete any action item. | Owner, Moderator, Administrator |
| Delete list. | Owner, Moderator, Administrator |
| Delete own action items. | Owner, Moderator, Administrator, Contributor Approver |
| View action items. | Owner, Moderator, Administrator, Contributor, Viewer, Approver |
| Edit List. | Administrator, Owner, Moderator |

Calendar Module Privileges

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

| Privilege | Privilege Set |
|--------------------|------------------------------------|
| View events. | Administrator, Contributor, Viewer |
| Add events. | Administrator, Contributor |
| Edit own events. | Administrator, Contributor |
| Delete own events. | Administrator, Contributor |
| Edit any event. | Administrator |
| Delete any event. | Administrator |

| Privilege | Privilege Set |
|---------------------------|----------------------|
| Edit calendar properties. | Administrator |
| Add a calendar. | Administrator |
| Delete a calendar. | Administrator |

Members Module Privileges

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

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

Related Data Module Privileges

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

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

Polls Module Privileges

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

| Privilege | Privilege Set |
|---------------------------------|-------------------------------------|
| Access poll results. | Administrator, moderator, publisher |
| Assign members. | Administrator, moderator |
| Assign respondents. | Administrator, moderator, publisher |
| Delete poll definition. | Administrator |
| Delete questions and responses. | Administrator, moderator, publisher |

| <i>Privilege</i> | <i>Privilege Set</i> |
|-------------------------|---|
| Edit poll metadata. | Administrator, moderator, publisher |
| Publish as pagelet. | Administrator, publisher |
| Update questions. | Administrator, author, moderator, publisher |
| View poll definition. | Administrator, author, moderator, publisher, viewer |

Browse Workspaces Module Privileges

All workspace members have access to this module.

Administration Module Privileges

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

| <i>Privilege</i> | <i>Privilege Set</i> |
|------------------------------|-----------------------------|
| Add/delete pagelets. | Owner, Administrator |
| Add modules. | Owner, Administrator |
| Change workspace properties. | Owner, Administrator |
| Delete modules. | Owner, Administrator |
| Edit workspace layout. | Owner, Administrator |
| Update contextual data. | Owner, Administrator |
| Update valid dates. | Owner |
| Update welcome text. | Owner, Administrator |

Setting Up a Workspace

This section elaborates on the details required to define a workspace.

Pages Used to Define Details of Workspaces

| Page Name | Definition Name | Usage |
|----------------------------------|------------------------|---|
| Administration - Properties Page | EPPCW_ADMIN_PROP | Enter detailed properties of a workspace including a name, description, category, valid dates, and welcome text. See Administering the Workspace Properties Page |
| Select Category Page | EPPCW_CATG_SELECT | Select the category that you want to assign to the workspace. See Administering the Workspace Properties Page |
| Administration - Members Page | EPPCW_ADMIN_MBR | Manage the membership settings of a workspace. See Administering Workspace Members |
| Set Invitation Message Page | EPPCW_ADMIN_INVITE | Write a member invitation message that you want to use as the default to invite members to participate in the workspace. See Administering Workspace Members |
| Create User Account Page | EPPCW_ADMIN_EXTUSR | Create a new account for an external user or look up existing external accounts by email address. See Administering Workspace Members |
| Administration - Modules Page | EPPCW_ADMIN_MOD | Select the modules that you want to include in the workspace. See Administering Workspace Modules |
| Documents Module Properties Page | EPPCW_DC_CATGOPTS | Determine properties for the Documents module such as whether checkouts, approvals, and version control are enabled. See Administering Workspace Modules |
| Add Pagelet Page | EPPPB_CP_ADD | Select a pagelet definition from a source portal, and add it to the template. See Administering Workspace Modules |
| Edit Pagelet Page | EPPPB_CP_EDIT | Edit the definition for a related pagelet. See Administering Workspace Modules |
| Key Name Mapping Page | EPPCW_ADMIN_KEYMAP | Specify and optionally rename the keys passed to the pagelet. See Administering Workspace Modules |

| Page Name | Definition Name | Usage |
|---|------------------------|--|
| <u>Administration - Contextual Data Page</u> | EPPCW_ADMIN_KEYS | Manage contextual data associated with the workspace. For example, you can enter data that ties the workspace to one or more transaction key fields. |
| Publish Feed Definition (Workspace Feeds) Page | PTFP_PUB_AS_FEED | Define feed security options, enter additional feed properties, and access advanced options. See Administering Workspace Feeds |
| Advanced Feed Options (Workspace Feeds) Page | EPPCW_PUB_ADVOPT | Select the workspace modules to be published and other advanced options for a workspace feed. See Administering Workspace Feeds |
| Publish as Feed (Workspace Feeds) | EPPCW_PUB_AS_LIST | Review, edit, add, or delete feed definitions for this item. See Administering Workspace Feeds |
| Publish Feed Definition to Sites Page | PTFP_PUB_AS_SITES | Publish an existing feed to other sites. |
| <u>Workspace Administration — Advanced Page</u> | EPPCW_ADMIN_ADV | Access advanced utilities and tools for configuring the workspace. |

Administering the Workspace Properties Page

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

Image: Administration - Properties page (workspace instance)

This example illustrates the fields and controls on the Administration - Properties page for a workspace instance. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Administration - Properties' page for a workspace instance. The page has a tabbed interface with 'Properties' selected. The form includes the following fields and controls:

- *Name:** A text input field containing 'Demo Workspace'.
- Description:** A text area containing 'Demonstration workspace for Facilities Department'.
- Category:** A dropdown menu with a search icon and a checkbox labeled 'Allow category override'.
- Valid From:** A date picker field.
- Valid To:** A date picker field.
- Welcome Text:** A rich text editor with a toolbar (including icons for bold, italic, underline, strikethrough, font color, background color, link, unlink, list, and indent) and a text area containing 'Demonstration workspace for Facilities Department'.
- Read Only Setting:** A section with a checkbox labeled 'Read Only' and explanatory text: 'The Read Only check box can be used to switch the workspace to a read only mode. All members except the owner and administrators will have 'Viewer' privilege.'
- Workspace Parent:** A dropdown menu.
- Save:** A button at the bottom left.

| | |
|--------------------------------|---|
| Name | The workspace name entered on the Name and Describe Workspace page appears, but can be overridden. |
| Description | The workspace description entered on the Name and Describe Workspace page appears, but can be overridden. |
| Category | <p>The workspace category selected on the Name and Describe Workspace page appears, but can be overridden.</p> <p>Click the Search Categories button to access the Select Category page, where you can select a category for the workspace.</p> |
| Valid From and Valid To | Enter the span of dates during which you want the workspace to be valid. |

Important! When the valid to date has passed, the workspace is expired. Workspace members can no longer access the workspace. In addition, portal administrators cannot manage the workspace such as deactivating or deleting the workspace.

Welcome Text

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

See the product documentation for *PeopleTools: Applications User's Guide*, "Using PeopleSoft Application Pages Working With Rich Text Editor Fields."

Read Only

Select to make the workspace read-only. All members except the owner and administrators have viewer privileges only in this mode.

Workspace Parent

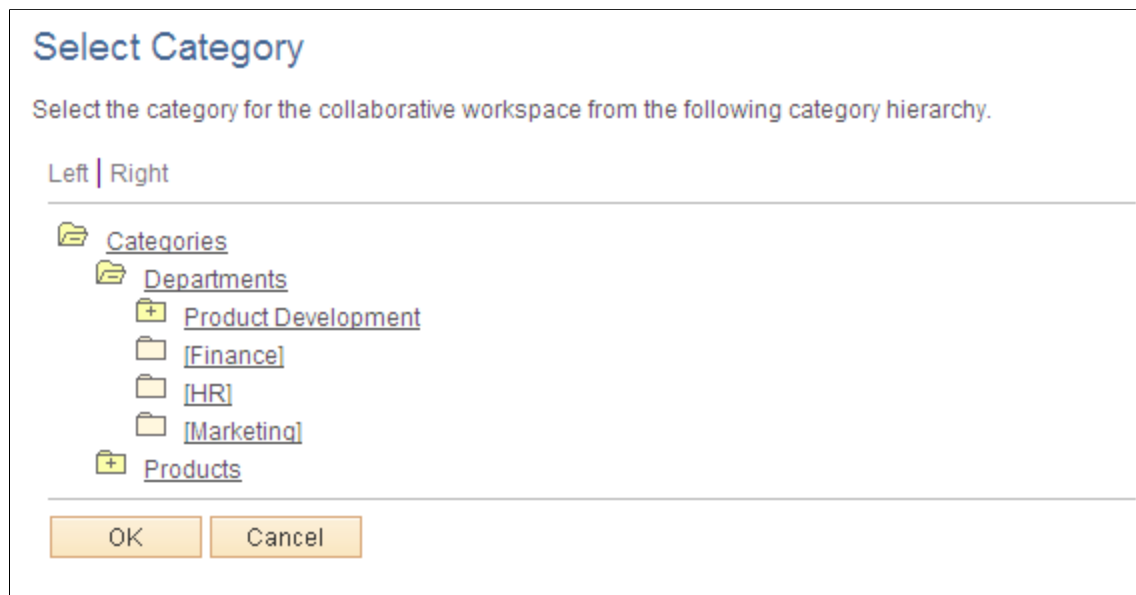
Select a workspace from the drop-down list box to make it the parent workspace. Select blank to make this workspace a root workspace.

Selecting a Workspace Category

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

Image: Select Category page

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



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

1. Browse the category hierarchy to view the available categories:
 - Click + next to a category folder to expand it and reveal its contents.

- Click – next to a category folder to collapse and hide its contents.
2. Click a link for a category to select that category for the workspace.

Administering Workspace Members

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

Adding Workspace Members

Send Invite

Select to send a notification to the selected members alerting them that they have been added as a member to the workspace.

The default notification text will be used and includes a link to the workspace homepage. Alternatively, you can send notifications after the workspace has been created, which also enables you to modify the notification text on the Set Invitation Message page.

Type

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

Available values include:

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

See 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 on the User Profiles page.

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

Member Name

Select a name from the list of roles or users.

Privilege Set

Select a privilege level that you want to assign to the member.

To be able to assign the *Administrator* or *Owner* privilege level to a member, you must have selected *User* in the Type field.

Available values are:

Administrator

Approver

Contributor

Moderator

Owner

Viewer

See [Understanding Workspace Privilege Sets](#).

Add Workspace Member

Click to add another member to the workspace.

Create User Account

Click to access the Create User Account page, which enables you to enter a new user name and email account for an external member.

Note: The Create User Account button appears only if the Enable External Users option has been set on the Installation Options page.

See [Installation Options Page](#).

Finish

Click to finish workspace creation and access the workspace homepage.

Sending Invitations to Workspace Members

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

Image: Set Invitation Message page

This example illustrates the fields and controls on the Set Invitation Message page.

Set Invitation Message

Set the invitation message for invited members.

Invitation Message:

You have been invited to join the collaborative workspace entitled "DEMO_WORKSPACE".

Description: Demonstration workspace for Facilities Department

You can access the workspace through the following link:
http://slc02kkn.us.oracle.com:8920/psp/PS91/DEMO_WORKSPACE/ENTP/h/?tab=DEFAULT

OK Cancel

Creating an External User Account

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

Image: Create User Account page

This example illustrates the fields and controls on the Create User Account page. You can find definitions for the fields and controls later on this page.

Create User Account

Create a new account for an external user or lookup existing external accounts by email address.

Email

Name

Matching Accounts

| User ID | Name |
|---------|---------------|
| SALES | Sales Manager |

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

Email Enter a valid email address.

The system user ID generated from this email address will be truncated at the @ sign. For example, an email address of first.last@xyz.com will result in a user ID of FIRST.LAST.

Name Enter a description for this account.

This will be used as the description in the PeopleTools user profile.

Matching Accounts After you enter a valid email address and exit the Email field, if a matching email address is found in the system, then the Matching Accounts group box appears displaying matching accounts.

Create Account Click to create a new external user account and return to the Add Members (Optional) page.

Cancel Click either button to return to the Add Members (Optional) page without creating the external user account.

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

See [Managing External User Accounts for Workspaces](#).

Administering Workspace Modules

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

Image: Administration - Modules page

This example illustrates the fields and controls on the Administration - Modules page. You can find definitions for the fields and controls later on this page.

Select which modules you would like for this workspace.

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

[Add Related Pagelet](#)

[Save](#)

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

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

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

The [Properties](#) link associated with a module enables you to further define the properties and options that are available in the module.

Defining Documents Module Options for a Workspace

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

Image: Documents Module Properties page

This example illustrates the fields and controls on the Documents Module Properties page. You can find definitions for the fields and controls later on this page.

Documents Module Properties

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

☒ Enable Content Versions

☐ Enable Content Checkout

☐ Enable Content Approval ☐ Cascade to All Child Folders

Enable Content Types to Add

☒ File Attachment

☒ Text or HTML

☒ Managed Content

OK

Enable Content Versions

Select to enable different versions of content.

Enable Content Checkout

Select to enable the check-in and checkout of documents posted to the Documents module of this workspace. If you select this option, fields and options enabling the check-in and checkout of documents appear appropriately on the pages used to post documents to the Documents module.

Enable Content Approval

Select to enable the approval of documents posted to the Documents module of this workspace. If you select this option, fields and options enabling the approval of documents appear appropriately on the pages used to post documents to the Documents module.

Cascade to All Child Folders

Sets the default approvals for all new content in child folders. The approval settings are transferred to all child folders when the page is saved. This setting does not affect existing child content approval settings.

Enable Text/HTML

Select to enable the posting of text and HTML documents to the Documents module of this workspace. If you select this option, the *Text or HTML* option appears on the Documents - Add Documents page in the Documents module.

Enable File Attachments

Select to enable the posting of file attachments to the Documents module of this workspace. If you select this option, the *File Attachment* option appears on the Documents - Add Documents page in the Documents module.

Enable Managed Content

Select to enable the posting of managed content to the Documents module of this workspace. If you select this option, the *Managed Content* option appears on the Documents - Add Documents page in the Documents module.

Adding or Editing a Related Pagelet in a Workspace

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

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

Image: Add Pagelet page

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

Add Pagelet

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

*Source Application:

*Pagelet Folder:

*Pagelet Name:

Pagelet

*Pagelet ID:

*Pagelet Title:

Description:

*Pagelet Folder:

Pagelet Security

☐ Publish as Public

☒ Publish with Security Roles ☐ Author Access

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

| *Type | Name | Description |
|-----------------|----------|-----------------------------|
| Permission List | PAPP0002 | Logged in User Access |
| Permission List | PAPP9000 | All Interaction Hub Objects |

Workspace Tabs

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

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

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

Source Application

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

To select the portal registry from the node of a content provider system, that node must already be defined as a source application.

See "Defining Source Application Page" (PeopleSoft Interaction Hub 9.1: Portal and Site Administration).

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

Mapping Keys for Context-Sensitive Pagelets

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

Image: Key Name Mapping page

This example illustrates the fields and controls on the Key Name Mapping page.

Key Name Mapping

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

Menu Item Label:

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

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

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

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

Related Links

"Using PeopleSoft Interaction Hub Content Reference Attributes" (PeopleSoft Interaction Hub 9.1: Portal and Site Administration)

[Workspace Administration — Advanced Page](#)

Administration - Contextual Data Page

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

Image: Administration - Contextual Data page

This example illustrates the fields and controls on the Administration - Contextual Data page. You can find definitions for the fields and controls later on this page.

PropertiesMembersModulesContextual DataFeedAdvanced

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

Related Keys

| Display | Record Name | Key | Custom Label | Value |
|-------------------------------------|-----------------|--------------------|---------------|------------|
| <input type="checkbox"/> | EO_PE_DEMO_DEPT | EO_PE_DEMO_DEPTID | Department ID | FACILITIES |
| <input checked="" type="checkbox"/> | EO_PE_DEMO_DEPT | EO_PE_DEMO_DEPTLBL | Department | Facilities |

Save

PropertiesMembersModulesContextual DataFeedAdvanced

Related Keys

If this workspace was created by means of a template for which contextual data has been defined, the key fields selected to supply contextual data appear here. The key field values can be specified at the time of creation of the workspace or by using the Administration module of the workspace once it has been created.

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

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

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

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

Administering Workspace Feeds

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

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

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

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

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

- The Publish as Feed page is displayed if a workspace feed has already been published. Continue with step 3.
- The Publish Feed Definition page is displayed if a workspace feed has not been published for this workspace. Continue with step 4.

3. Determine whether you want to edit one of the current workspace feeds, or create a new workspace feed.

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

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,” Understanding Creation and Use of Feeds and Feed Templates.

5. You must select at least one module for publishing in this workspace feed. Therefore, click the Advanced Options link.
6. Set the advanced options for the workspace feed on the Advanced Feed Options page.
7. Click OK on the Advanced Feed Options page.
8. Click the Publish button on the Publish Feed Definition page to save any new or revised feed definitions.

Modifying and Saving Workspace Feed Definitions

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

Image: Publish as Feed page (Workspace Feeds)

This example illustrates the fields and controls on the Publish as Feed page (Workspace Feeds). You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Publish as Feed' page for 'Workspace Feeds'. It includes a tabbed interface with 'Feed' selected. The page title is 'Publish as Feed'. Below the title, there is a description: 'Review, edit or add feed definitions for this item. Only feed definitions published in the current site are marked as published and can be edited.' A table titled 'Feed Definitions' displays one feed definition: '1 Demo Workspace'. The table has columns for 'Feed Title' and 'Published'. The 'Published' column shows a checked checkbox. Below the table, there are buttons for 'Add Feed', 'Save', 'Edit', and 'Delete'.

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

| | |
|-------------------|--|
| Feed Title | Click a link in this column to view the feed document for that workspace feed. |
| Published | Indicates whether a workspace feed is currently published. |
| Edit | Click to edit an existing workspace feed definition. |
| Delete | Click to delete an existing workspace feed definition. |
| Add Feed | Click to add a new workspace feed definition. |
| Save | Click to save a new feed definition or changes to existing workspace feed definitions. |

Setting Advanced Options for Workspace Feeds

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

Image: Advanced Feed Options page (Workspace Feeds)

This example illustrates the fields and controls on the Advanced Feed Options page (Workspace Feeds).

Workspace Feeds

Publish Feed Definition

Set the values to create or update a feed definition.

Load From Template

Feed Properties

*Feed Title

Description

Owner ID

Category

Advanced Options

▶ Additional Feed Properties

Feed Security Options

☐ Publish as Public
 ☒ Publish with Realtime Security
 ☐ Publish with Selected Security

Publish Cancel

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

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

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

To set advanced options for a workspace feed:

1. Set the maximum number of entries per module for this workspace feed in the Max Number of Entries field.
2. From the list of available workspace modules, select those modules that you want to publish in this workspace feed.

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

3. Click OK.

Related Links

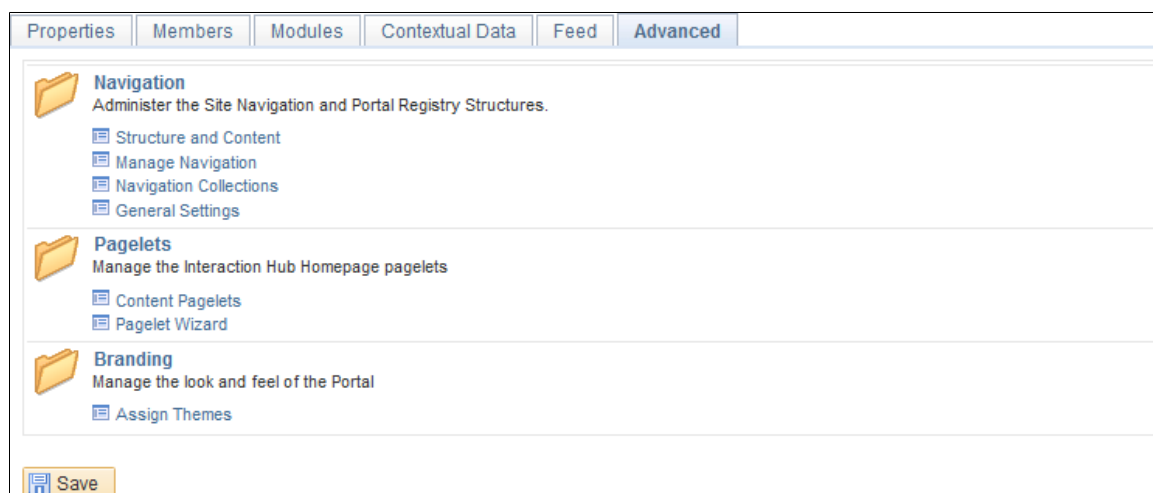
"Publishing PeopleSoft Interaction Hub Content as a Feed" (PeopleSoft Interaction Hub 9.1: Using Portal Features)

Workspace Administration — Advanced Page

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

Image: Administration - Advanced page (workspace instance)

This example illustrates the fields and controls on the Administration - Advanced page for a workspace instance. You can find definitions for the fields and controls later on this page.



Navigation

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

See "Manage Navigation Page" (PeopleSoft Interaction Hub 9.1: Portal and Site Administration).

See the product documentation for *PeopleTools: Portal Technology*, “Administering Portals.”

Pagelets

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

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

Branding

Access utilities and tools that enable you to change branding theme assignments for the template.

See "Themes, Headers, and Skins" (PeopleSoft Interaction Hub 9.1: Branding). In addition, see *PeopleTools: Portal Technology*, “Using PeopleTools Branding Features,” Administering System Branding, Assigning Branding Themes.

Designating the Content and Layout of the Workspace Homepage

This section discusses ways to modify the content and layout of the workspace homepage.

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

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

Understanding the Content and Layout of the Workspace Homepage

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

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

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

Tab Content Page

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

Image: Tab Content page

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

Content | Layout

Tab Content

Label: Welcome

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

Search Pagelets ?

This pagelet search will allow the user to search the local and remote pagelet's based on the search criteria and the node selection.

Pagelet Search

▼ PeopleSoft Applications

☐ Include all?

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

[Return to Home](#)

Save **Notify**

[Content](#) | [Layout](#)

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

To select pagelets for the workspace homepage:

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

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

2. Use the drop-down list box to select the pagelet behavior:

Optional

The pagelet will not appear on the welcome page. *Do not select this option.*

Opt-Dflt (optional-default)

The pagelet will appear on the workspace homepage for all members. The pagelet position can be modified by the administrator only; the pagelet can also be removed by a member from his or her workspace homepage.

Required

The pagelet will appear on the workspace homepage for all members. The pagelet position can be modified by the administrator only.

Req-Fix (required-fixed)

The pagelet will appear on the workspace homepage for all members. The pagelet column can be modified by the administrator only; however, the pagelet will always appear at the top of the column.

3. *PeopleTools: Portal Technology*

Click the Save button.

See the product documentation for *PeopleTools: Portal Technology*

“Administering Portal Homepages and Pagelets,” Managing Tabbed Homepages, Selecting Tab Content.

Tab Layout Page

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

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

Moving Pagelets on the Tab Layout Page

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

Image: Tab Layout page

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

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

Label Displays the name of this tab.

Basic Layout Select to display the pagelets in either two or three columns on the workspace homepage.

To specify the three-column layout, be sure that at least one pagelet does not have the Req-Fix behavior option selected on the Tab Content page.

Left Column, Center Column, and Right Column Displays the pagelets selected on the Tab Content page under the assigned column headings.

If the basic layout is two columns, the pagelets are divided into left and right columns. If the basic layout is three columns, the pagelets are divided into left, center, and right columns.

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

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



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

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

Delete Pagelet

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

See the product documentation for *PeopleTools: Portal Technology*, “Administering Portal Homepages and Pagelets,” Managing Tabbed Homepages, Arranging the Tab Layout.

Dragging and Dropping Pagelets on the Workspace Homepage

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

To drag a pagelet, move the cursor 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 button.

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

See the product documentation for *PeopleTools: Applications User's Guide*, “Setting User Preferences,” Personalizing Your Homepage, Personalizing Layout.

Managing the Status of Workspaces

This section provides an overview of workspace statuses and discusses how to manage workspaces, including how to inactivate and delete workspaces.

Pages Used to Manage the Status of Workspaces

| Page Name | Definition Name | Usage |
|-------------------------------|-------------------|---|
| <u>Manage Workspaces Page</u> | EPPCW_MANAGE | Manage tasks on your workspaces, such as inactivating, activating, and deleting them. |
| Delete Confirmation Page | EPPCW_DEL_CONFIRM | Confirm your selected deletion. |

Understanding Workspace Statuses

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

Manage Workspaces Page

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

Image: Manage Workspaces page

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

Manage Workspaces

Activate, deactivate or delete existing collaborative workspaces.

Filter Workspaces

Category:

Owner:

Status: ☒ Active ☒ Inactive

Keyword:

Search

Reset

| Workspaces | | | | |
|-------------------------------|--------------------------------|----------|---------------------------|--------|
| Personalize Find View All | | | | |
| First 1-7 of 7 Last | | | | |
| Select | Workspace | Category | Owner | Status |
| <input type="checkbox"/> | Anniversary Celebration | | Vice President of Finance | Active |
| <input type="checkbox"/> | Anniversary Celebration | | Vice President of Finance | Active |
| <input type="checkbox"/> | Compensation Manager Workspace | | PeopleSoft Demo Role User | Active |
| <input type="checkbox"/> | Demo Wiki Workspace | | Vice President of Finance | Active |
| <input type="checkbox"/> | Demo workspace | | Vice President of Finance | Active |
| <input type="checkbox"/> | Performance Management Wrkspc | | PeopleSoft Demo Role User | Active |
| <input type="checkbox"/> | Sun Microsystems Opportunity | | Lee,Burt | Active |

Select All Clear All

Activate Deactivate Delete Read Only

☐ Cascade to all children.

Filter Workspaces

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

Workspaces

| | |
|-------------------|---|
| Select | Select to indicate that you want to perform a managerial action on the workspace. |
| Workspace | Displays the name of the workspace. Click the link to access the workspace. |
| Category | The system displays the category to which the workspace is assigned. |
| Owner | The system displays the name of the workspace owner. |
| Status | The system displays whether the workspace is active or inactive. |
| Activate | Click to reactivate the selected workspace. |
| Deactivate | Click to deactivate the selected workspace. The workspace is no longer accessible or usable by its members, but its data continues to be stored in your database. |

Note: You cannot deactivate an expired workspace.

| | |
|---------------|--|
| Delete | Click to delete the selected workspace. You are prompted to confirm your deletion. |
|---------------|--|

Note: You cannot delete an expired workspace.

Note: To expire a workspace, define the Valid To date in the Administration - Properties page. See, [Administering the Workspace Properties Page](#).

Moving a Workspace in the Workspace Hierarchy

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

See [Administering the Workspace Properties Page](#).

Importing and Exporting Workspace Data

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

See My Oracle Support, Knowledge, Portal Solutions, PeopleSoft Interaction Hub.

Managing External User Accounts for Workspaces

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

Image: Manage External Users page

This example illustrates the fields and controls on the Manage External Users page.

Manage External Users

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

▼ Filter External Users

Last Signon Before:

Keyword:

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

Select All Clear All

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

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

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

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

Chapter 5

Working in Collaborative Workspaces

Accessing Workspaces

The topic discusses ways to work with the My Workspaces pagelet. It also provides information on searching, browsing and accessing workspaces.

Pages Used to Access Workspaces

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|------------------------------------|-------------------------------|---|
| <u>My Workspaces Page</u> | PTPPB_USER_PREF | Specify the number of workspaces to display in the pagelet. |
| <u>Workspaces - Search Page</u> | EPPCW_MYWS | Specify criteria to search for workspaces of which you are already a member. |
| <u>Workspaces - Hierarchy Page</u> | EPPCW_HIER_SPACES | Traverse the entire workspace hierarchy including workspaces of which you are not a member. |
| <u>Browse By Category Page</u> | EPPCW_BROWSE | Browse by category through workspaces of which you are already a member. |
| Workspace Invitation Page | EPPCW_MBR_REQUEST | Send a membership request to the workspace administrator. See Requesting Access to a Workspace |
| Workspace Security Error Page | EPPCW_SECURITY_ERR | Send a membership request to the workspace administrator. See Requesting Access to a Workspace |
| Select Category | EPPCW_CATG_SELECT | Select the category to enter as search criteria. |

Understanding How to Access Workspaces

Oracle's PeopleSoft Interaction Hub provides several tools to facilitate access to workspaces:

- My Workspaces pagelet

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

- Workspaces - Search page

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

Note: Expired workspaces are not listed in the search page.

- Workspaces - Hierarchy page

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

Note: You cannot access an expired workspace.

- Browse By Category page

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

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

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

My Workspaces Page

This section discusses how to:

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

Personalize My Workspaces Page

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

Image: Personalize My Workspaces page

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

OK Cancel [Copy Settings](#)

Page Personalization

☐ Put this page in front (the current tab) when I come into this component.

☒ Save tabbing order personalized below.

To define new tabbing order, select Clear Tabbing Order, then click items to include in desired sequence. This new Tab order setting may be overridden by the people code command SetCursorporos(). To rearrange tabbing order, select Remove from order, Move up in order, or Move down in order, then click appropriate items to rearrange.

☐ Disable Autocomplete for the entire page.

☐ Disable Autocomplete for the entire component.

To configure Autocomplete for the entire page or component, select the above appropriate checkboxes.

To enable or disable Autocomplete for a specific field, select the Autocomplete toggle icon next to the field. When Autocomplete is disabled, the toggle icon will be grayed out or not shown.

Clear Tabbing Order Restore Default

☒ Include In Tabbing Order ☐ Remove From Order ☐ Move Up In Order ☐ Move Down In Order

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

Max Rows

Specify the maximum number of workspaces to display in the My Workspaces pagelet.

Note: Specifying 0, display all rows up to the maximum row allowed in Query security profiles.

Reset to Defaults

Click to reset the Max Rows field to the delivered default value of 20.

My Workspaces Page

Access the My Workspaces pagelet on the portal homepage.

Image: My Workspaces pagelet

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

| ▼ Search Results | | |
|---|---|----------|
| Name | Description | Category |
| Anniversary Celebration | to coordinate plans for HQ Anniversary Celebration | |
| Anniversary Celebration | HQ | |
| Compensation Manager Workspace | For activities around planning and managing compensation | |
| Sun Microsystems Opportunity | | |
| Performance Management Wrkspc | For managers to collaborate on goals, objectives, performance and other common activities | |
| Demo Wiki Workspace | Demo Wiki Workspace | |
| Demo workspace | Demonstration workspace for Facilities Department | |
| <div>Browse By Category</div> <div>Create Workspace</div> | | |

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

<workspace name>

Click to access the homepage of the workspace.

View All Workspaces

Click to access the Search - Workspaces page, where you can search for workspaces.

See [Workspaces - Search Page](#).

Create Workspace

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

See [Creating Root-Level Workspaces](#).

Workspaces - Search Page

Access the Workspaces - Search page (Browse Workspaces).

Image: Workspaces - Search page (advanced search options)

This example illustrates the fields and controls on the Workspaces - Search page (advanced search options). You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Workspaces - Search' page. At the top, there are two tabs: 'Search' (selected) and 'Hierarchy'. Below the tabs is the title 'Workspaces'. Underneath is a section titled 'Search For Workspaces' with two input fields: 'Workspace Name' and 'Category'. To the right of the 'Category' field is a magnifying glass icon. Below these fields are two buttons: 'Search' and 'Advanced Search'. Below the search filters is a section titled 'Search Results' containing a table with three columns: 'Name', 'Description', and 'Category'. The table lists several workspaces, including 'Anniversary Celebration', 'Compensation Manager Workspace', 'Sun Microsystems Opportunity', 'Performance Management Wrkspc', 'Demo Wiki Workspace', and 'Demo workspace'. At the bottom of the page are two buttons: 'Browse By Category' and 'Create Workspace'.

| Name | Description | Category |
|--------------------------------|---|----------|
| Anniversary Celebration | to coordinate plans for HQ Anniversary Celebration | |
| Anniversary Celebration | HQ | |
| Compensation Manager Workspace | For activities around planning and managing compensation | |
| Sun Microsystems Opportunity | | |
| Performance Management Wrkspc | For managers to collaborate on goals, objectives, performance and other common activities | |
| Demo Wiki Workspace | Demo Wiki Workspace | |
| Demo workspace | Demonstration workspace for Facilities Department | |

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

Workspace Name

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

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

Category

Select the workspace category on which to search.

| | |
|---|--|
| | Click the Search Categories button to view the category hierarchy. |
| Owner | Select the owner on which to search. The Owner field appears when you click the Advanced Options link. |
| Template | Select the template on which to search. The Template field appears when you click the Advanced Options link. |
| Search | Click to carry out the workspace search based on the criteria entered. |
| Advanced Search and Basic Search | Click to toggle between the advanced and basic search criteria. |
| Name | Click a workspace name in the Search Results grid to navigate to the homepage of the workspace. |
| Browse By Category | Click to access the Browse By Category page. See Browse By Category Page . |
| Create Workspace | Click to access the workspace creation wizard, which you can use to create a root-level workspace. See Creating Root-Level Workspaces . |

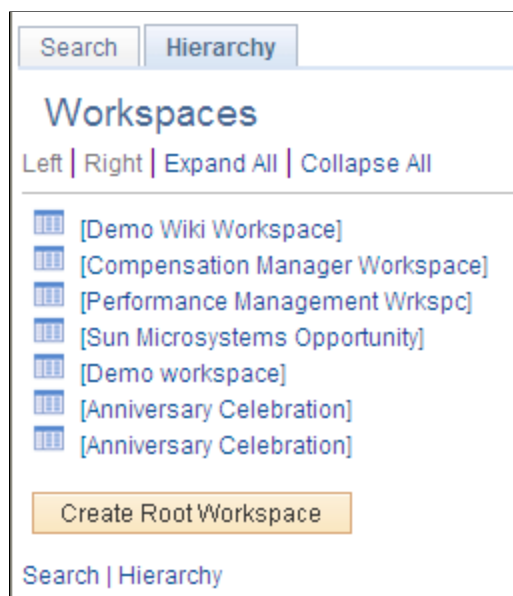
Note: Expired workspaces are not listed in the search page.

Workspaces - Hierarchy Page

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

Image: Workspaces - Hierarchy page (with a parent workspace selected)

This example illustrates the fields and controls on the Workspaces - Hierarchy page (with a parent workspace selected). You can find definitions for the fields and controls later on this page.



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

Left and Right

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

Expand All and Collapse All

Click to toggle between all parent workspaces fully expanded or fully collapsed.

<workspace name>

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

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

The selected workspace is highlighted in yellow.

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



Indicates a workspace that does not have any children.



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



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



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

See [Creating Child Workspaces](#).



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

Note: You cannot access an expired workspace.

Related Links

[Requesting Access to a Workspace](#)

Browse By Category Page

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

Image: Browse By Category page

This example illustrates the fields and controls on the Browse By Category page. You can find definitions for the fields and controls later on this page.

Browse By Category

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

[Top](#)

| Workspaces By Category | | | |
|------------------------|----------|------------|---------|
| Category / Workspace | Type | Created By | Created |
| Categories (2) | Category | | |
| Unfiled (7) | Category | | |

[Return to Search](#)

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

Workspace/Category

Click to access the particular workspace.



Designates a category folder.

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



Designates a workspace in the category hierarchy.

Click a workspace link to access the workspace.

Requesting Access to a Workspace

This section discusses how to:

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

Requesting Membership to a Workspace

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

Image: Workspace Invitation page

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

Workspace Membership Request

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

☒ Send Request To: Vice President of Finance

Email

Subject: Request for membership to workspace SUNMICROSYSTEMWORKSPACE

Message: User ID: PTDMO

Send

Cancel

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

Send Invitation

Select the administrator or administrators to whom you want to send the request.

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

Requesting Membership When You Receive a Workspace Security Error

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

Image: Workspace Security Error page

This example illustrates the fields and controls on the Workspace Security Error page. You can find definitions for the fields and controls later on this page.

Workspace Security Error

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

☒ Vice President of Finance

Email

Subject: Request for membership to workspace DEMOWIKIWORKSPACE

Message: User ID: PTDMO

[Return to Home](#)

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

| | |
|------------------|--|
| unlabeled | Select the administrator or administrators to whom you want to send the request. |
| Subject | Enter the subject of the message or accept the default text. |
| Message | Enter the body of the message or accept the default text. |
| Send | Click to send the request. |

Return to Home

Click to return to portal homepage.

Navigating in a Workspace

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

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

Image: Workspace homepage

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

The screenshot displays the Oracle Workspace homepage for 'Demo Workspace'. The header includes the Oracle logo, 'Workspace | Demo Workspace', and a user greeting 'Welcome Vice President of Finance'. The left sidebar contains a 'Menu' with options like 'Welcome', 'Discussions', 'Documents', 'Blogs', 'Links', 'Action Item Lists', 'Calendar', 'Members', 'Related Data', 'Polls', 'Browse Workspaces', and 'Administration'. Below the menu is the 'Department' section for 'Facilities' and a 'Tags' section with 'Public' and 'Private' tabs. The main content area is divided into three columns. The first column, 'Welcome', contains a 'Welcome' message and a 'Recent Discussions' table. The 'Recent Discussions' table has columns for 'Date', 'Recent Posts', and 'Author'. The 'Recent Documents' table has columns for 'Date', 'Title', and 'Author'. The 'Open Action Items' table has columns for 'Due Date', 'Action Item', and 'Assigned To'. The right-hand side of the page contains a 'Poll' section, a 'Calendar' for September 2009, and a 'Links' section.

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

The following elements appear in the workspace header:

Portal Home

Click to exit the workspace and access the PeopleSoft Interaction Hub homepage.

Sign out

Click to sign out of the PeopleSoft system.

<Workspace Name>

Click to access the workspace homepage.



Move your mouse cursor over any of these icons to view the list of feeds published as workspace feeds. Click any list item to open that feed document.

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

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

Search

Click and enter a search phrase in the Search field.



Click to perform a search within the workspace.

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

See [Searching Within Workspaces](#).

Content

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

See [Tab Content Page](#).

Layout

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

See [Tab Layout Page](#).

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

Note: The Administration link appears only for members designated as administrators for this workspace.

Welcome

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

Wiki Content

Click to access the Wiki Content module.

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

Use the Wiki Content module to collaboratively author wiki content for the workspace. The Wiki Content module provides features such as version control and multilanguage support that

allow continuous and collaborative refinement of the content.

The rich text editor is used to edit the wiki content, which also appears in the Wiki Content pagelet.

See [Using the Wiki Content Module](#).

Discussions

Click to access the Discussions module.

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

See [Using the Discussions Module](#).

Documents

Click to access the Documents module.

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

See [Using the Documents Module](#).

Blogs

Click to access the Blogs module.

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

See [Using the Blogs Module](#).

Links

Click to access the Links module.

Use the Links module to create a collection of links that are relevant to the workspace. This collection appears in the Links pagelet, which appears on the workspace homepage.

See [Using the Links Module](#).

Action Item Lists

Click to access the Action Item Lists module.

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

See [Using the Action Item Lists Module](#).

Calendar

Click to access the Calendar module.

Use the Calendar module to maintain the workspace calendar and events to coordinate the activities of the workspace team. Members can also monitor current events using the Upcoming Events and Calendar pagelets, which appear on the workspace homepage.

See [Using the Calendar Module](#).

Members

Click to access the Members module.

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

See [Using the Members Module](#).

Related Data

Click to access the Related Data module.

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

See [Using the Related Data Module](#).

Polls

Click to access the Polls module.

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

See [Using the Polls Module](#).

Browse Workspaces

Click to access the Browse Workspaces module.

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

See [Using the Browse Workspaces Module](#).

Administration

Note: The Administration link appears only for members who are designated as administrators for this workspace.

Click to access the Administration module for the workspace.

The workspace administrator can use the Administration module to define workspace properties, manage workspace membership and security, select workspace modules, define contextual

data relationships, and further customize the workspace. The Administration module is required in all workspaces.

See [Setting Up a Workspace](#).

Return to <Transaction Name>

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

Modifying Your Workspace Homepage

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



Click to remove a pagelet from the workspace homepage.

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

Related Links

[Designating the Content and Layout of the Workspace Homepage](#)

Using the Wiki Content Module

This section provides an overview of the Wiki Content module and discusses editing, viewing, reviewing content and working with the Wiki Content pagelet.

Pages Used with the Wiki Content Module

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|---------------------------|------------------------|--|
| Edit Page | EPPWI_WIKI_PAGE | Edit and format the wiki content. See Editing Wiki Content Module . |
| Email Notifications Page | EPPWI_EVENT_NOTIFY | Send an ad hoc email notification regarding wiki content to selected workspace members. See Editing Wiki Content Module |
| View Page | EPPWI_VIEW_PAGE | Preview the wiki content as it will appear in the Wiki Content pagelet. |
| Information Page | EPPWI_PAGE_INFO | Review the list of wiki content versions. See Reviewing Content Information |

| Page Name | Definition Name | Usage |
|-----------------------|------------------------|---|
| Compare Versions Page | EPPWI_PAGE_DIFF | Compare the differences between two wiki content versions. See Reviewing Content Information |

Understanding the Wiki Content Module

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

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

See [Administering the Workspace Properties Page](#).

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

| Feature | Wiki Content | Welcome Pagelet |
|-----------------------------|---------------------|------------------------|
| Rich text editor | Y | Y |
| Collaborative authoring | Y | N |
| Administrator authored | N | Y |
| Links to PeopleSoft content | Y | N |
| Links to external URLs | Y | Y |
| Version history | Y | N |
| Version comparison | Y | N |
| Email notification | Y | N |

This section also includes an overview of revision control.

Understanding Revision Control

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

- View version history and previous versions.
- Compare any two versions.
- Delete a version.

- Restore a version to be the current version.

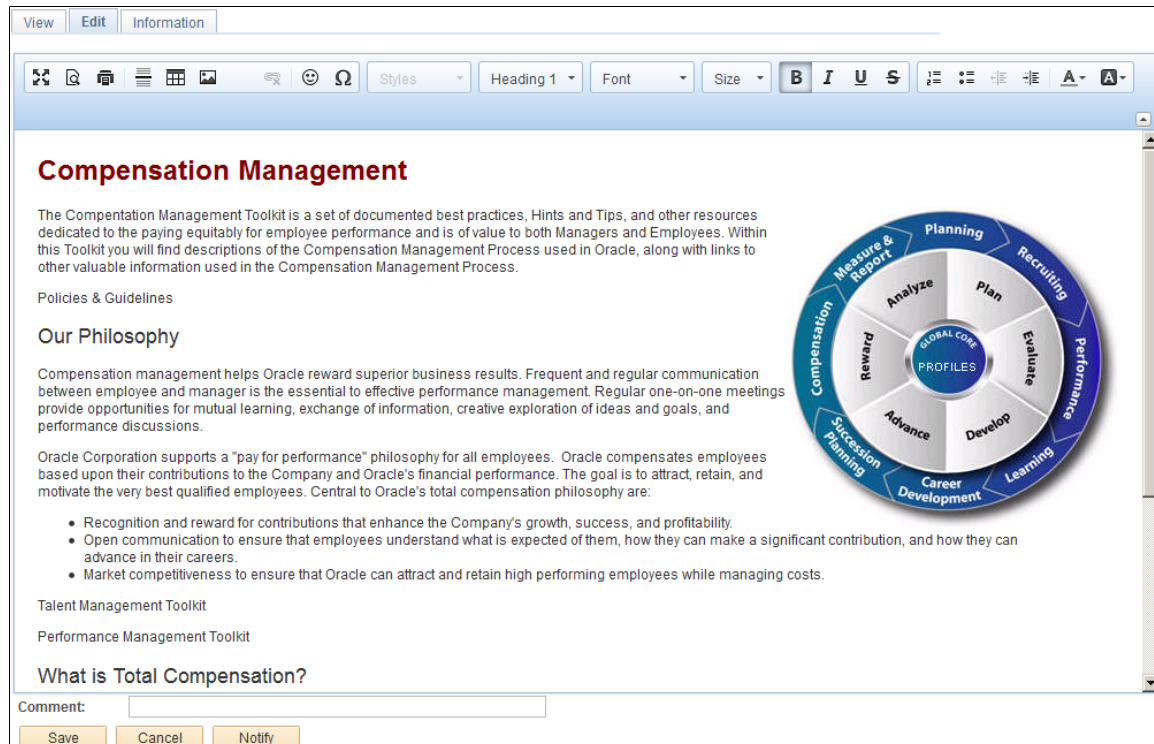
See [Reviewing Content Information](#).

Editing Wiki Content Module

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

Image: Edit page (Wiki Content module)

This example illustrates the fields and controls on the Edit page (Wiki Content module).



Use the Edit page to edit the wiki content.

rich text editor

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

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

See the product documentation for *PeopleTools: Applications User's Guide*, "Using PeopleSoft Application Pages," Working With Rich Text Editor Fields.

See the product documentation for *PeopleTools: Application Designer Developer's Guide*, "Creating Page Definitions," Setting Page Field Properties for Controls, Setting Options Properties.



Click the Link button open the Link dialog box.

This dialog box enables you to create links to other content within the PeopleSoft Interaction Hub system or to external URLs.

Save

Click to save the wiki content as a new version.

The View page is displayed after a save.

Cancel

Click to exit the Edit page without saving your changes.

The View page is displayed after you cancel your edits.

Notify

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

Adding Links to Content

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

Image: Link dialog box: Link Info tab

This example illustrates the fields and controls on the Link dialog box: Link Info tab. You can find definitions for the fields and controls later on this page.

Link Info Target

Link

Alias

Tooltip

Content Type

&totalResults3

| Topic | Forum | Author | Last Updated |
|---|--------------------------------|--------------------------|---------------------|
| Re: What are the off... | Employee Kiosk | Vice President of Financ | 2002-03-15-12:20:46 |
| Re: What are the off... | Employee Kiosk | Vice President of Financ | 2002-03-15-12:21:24 |
| What are the office ... | Employee Kiosk | Vice President of Financ | 2002-03-15-12:17:19 |

1

OK Cancel

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

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

Link

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

Alias

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

Tooltip

Enter the hover text to appear as a tool tip when the mouse cursor is moved over the link.

Content Type

Select one of the following content types:

- *Attachments* — Any content stored within the Documents module of the current workspace.

Enter search text to search for specific content.

- *Discussions* — Any discussion topic from forums within the portal and other workspaces.

Enter search text to search for specific discussion forums or topics.

- *Blogs* — Any blog post from blogs within the portal and other workspaces.

Enter search text to search for specific blogs or posts.

- *Workspaces* — Any active workspace in the PeopleSoft Enterprise Portal system.

Enter search text to search for specific workspaces and limit the search by selecting one of the following scopes:

- *All Workspaces*
- *The selected root workspace*
- *The selected workspace category*

- *External URL* — Any complete URL.

search text

Enter the search text.

Search

Click to perform the search.

Name, Forum, Blog, and Workspace

Click to select an item as the target of the link.

Topic and Post

Click to select an item as the target of the link.

Author and Creator

Indicates the author for documents, discussion topics, and blog posts, and the workspace creator.

Last Updated

Indicates the last updated date and time for the item.

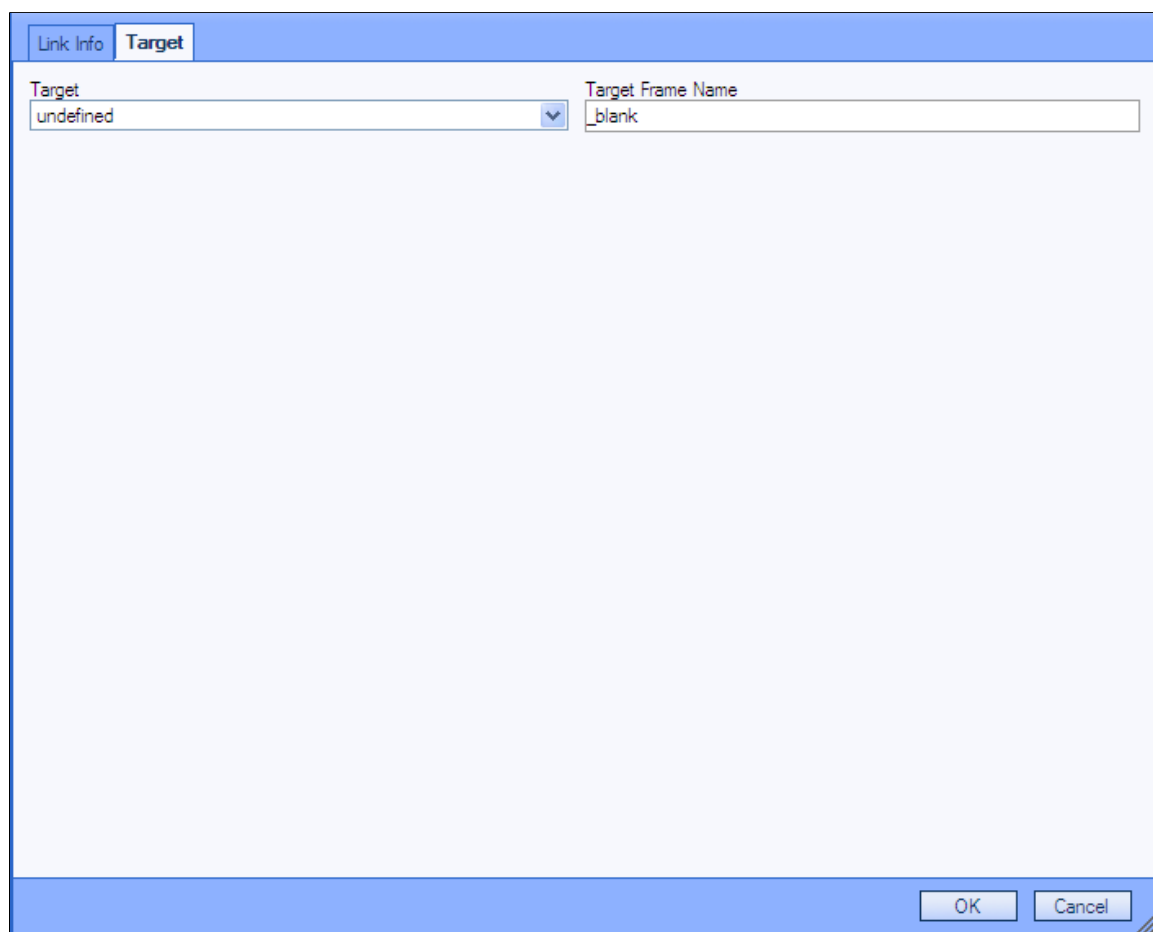
1, 2, and ...

Click to go to a specific page of search results.

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

Image: Link dialog box: Target tab

This example illustrates the fields and controls on the Link dialog box: Target tab. You can find definitions for the fields and controls later on this page.



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

Target

Select one of the following targets:

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

Target Frame Name

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

Sending Email Notifications

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

Image: Email Notifications page (Wiki Content module)

This example illustrates the fields and controls on the Email Notifications page (Wiki Content module). You can find definitions for the fields and controls later on this page.

Email Notifications

Message not found -- Send an email notification

Group Box

☐ All Workspace Members ☐ Workspace Owner ☐ Me

Add Selected to Email

Email

Email To:

Cc:

Bcc:

Email Subject: Notification - Workspace: 'DEMOWIKIWORKSPACE'

Message Text:

Send Cancel

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

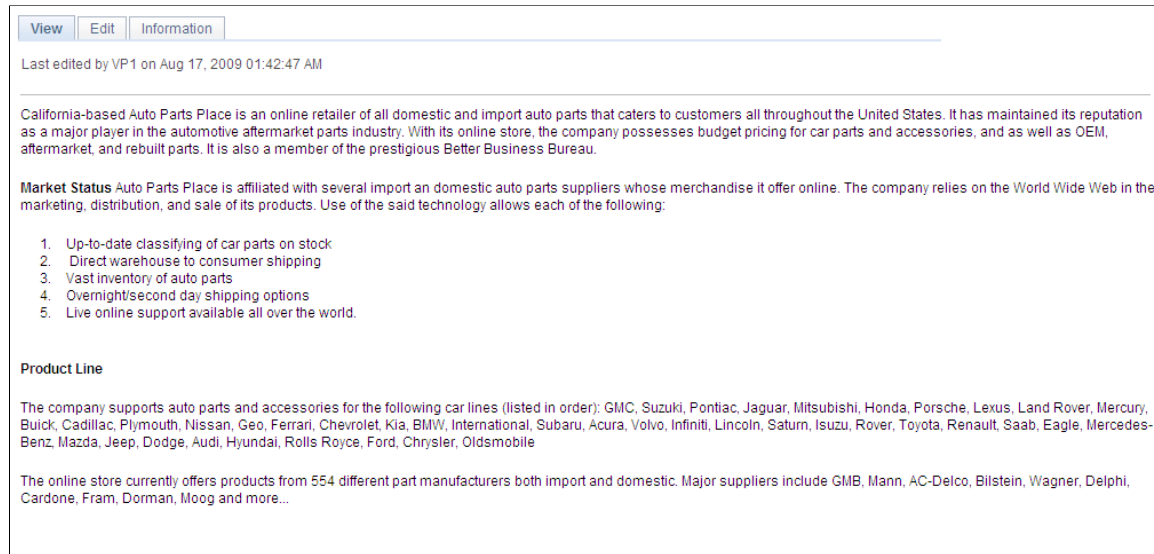
| | |
|---|---|
| All Workspace Members, Workspace Owner, and Me | <p>Click to select the workspace members whom you want to receive the message.</p> <p>Selecting any of these options and clicking the Add Selected to Email button will populate the Email To field with the email addresses for the corresponding users from their PeopleSoft system profiles.</p> |
| Add Selected to Email | <p>Click to add email addresses for the selected workspace members to the Email To field.</p> <p>Additionally, you can manually enter email addresses in the Email To, Cc, and Bcc fields.</p> |
| Email To | <p>Enter the email addresses for individuals whom you want to receive the email message.</p> <p>Separate addresses with a comma.</p> |
| Cc | <p>Enter the email addresses for individuals whom you want to receive the email message as a carbon copy.</p> <p>Separate addresses with a comma.</p> |
| Bcc | <p>Enter the email addresses for individuals whom you want to receive the email message as a blind carbon copy.</p> <p>Separate addresses with a comma.</p> |
| Email Subject | <p>Enter the text for the subject of the email message.</p> |
| Message Text | <p>Enter the text of the message in this text box. The text appears in the email message along with a URL to the Wiki Content module.</p> |
| Send | <p>Click to send the email notification.</p> |
| Cancel | <p>Click to cancel sending the email notification.</p> |

View Page

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

Image: View page (Wiki Content module)

This example illustrates the fields and controls on the View page (Wiki Content module). You can find definitions for the fields and controls later on this page.



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

Reviewing Content Information

This section discusses how to:

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

Reviewing Version Information

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

Image: Information page (Wiki Content module)

This example illustrates the fields and controls on the Information page (Wiki Content module). You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Information' tab of a Wiki page. It displays the page name 'DEMOWIKIWORKSPACE', creation date '08/16/2009 11:07PM', and creator 'VP1'. Below this is a 'Recent Changes' table with columns for Version, Compare Versions, Date Last Modified, Updated By User, Comment, Delete Version, and Restore Version. The table lists three versions: Version 3 (Aug 17, 2009 01:42:47 AM, VP1), Version 2 (Aug 17, 2009 01:34:52 AM, VP1), and Version 1 (Aug 16, 2009 11:13:26 PM, VP1). Each version has a 'Delete' button and a 'Restore Version' link. A 'Compare Versions' button is located at the bottom left of the table.

| Version | Compare Versions | Date Last Modified | Updated By User | Comment | Delete Version | Restore Version |
|---------|--------------------------|--------------------------|-----------------|---------|----------------|-----------------|
| 3 | <input type="checkbox"/> | Aug 17, 2009 01:42:47 AM | VP1 | | Delete | Restore Version |
| 2 | <input type="checkbox"/> | Aug 17, 2009 01:34:52 AM | VP1 | | Delete | Restore Version |
| 1 | <input type="checkbox"/> | Aug 16, 2009 11:13:26 PM | VP1 | | Delete | Restore Version |

Compare Versions

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

Wiki Page Name

Displays the name of the wiki page, which is equivalent to the name of the workspace as stored in the portal definition table.

Created Datetime

Displays the date and time that the wiki page was created, which is equivalent to the date and time that the workspace was created.

Created By

Displays a link to the profile of the user who created the wiki page, which is the ID of the user who created the workspace.

Version

Displays the version number.

Compare Versions

Select two and only two versions for comparison. Then, click the Compare Versions button.

Date Last Modified

Click a link in this column to display that version on the View page.

Updated By User

Displays the user ID of the person who created the version.

Comment

Displays the comment for the version.

Delete

Click to delete a version.

Restore Version

Click a link in this column to restore that version to be the current version.

Important! No confirmation of your choice to restore a version appears.

Compare Versions

Select two and only two versions, then click this button to compare the versions.

Deleting a Version

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

Restore a Version to Be the Current Version

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

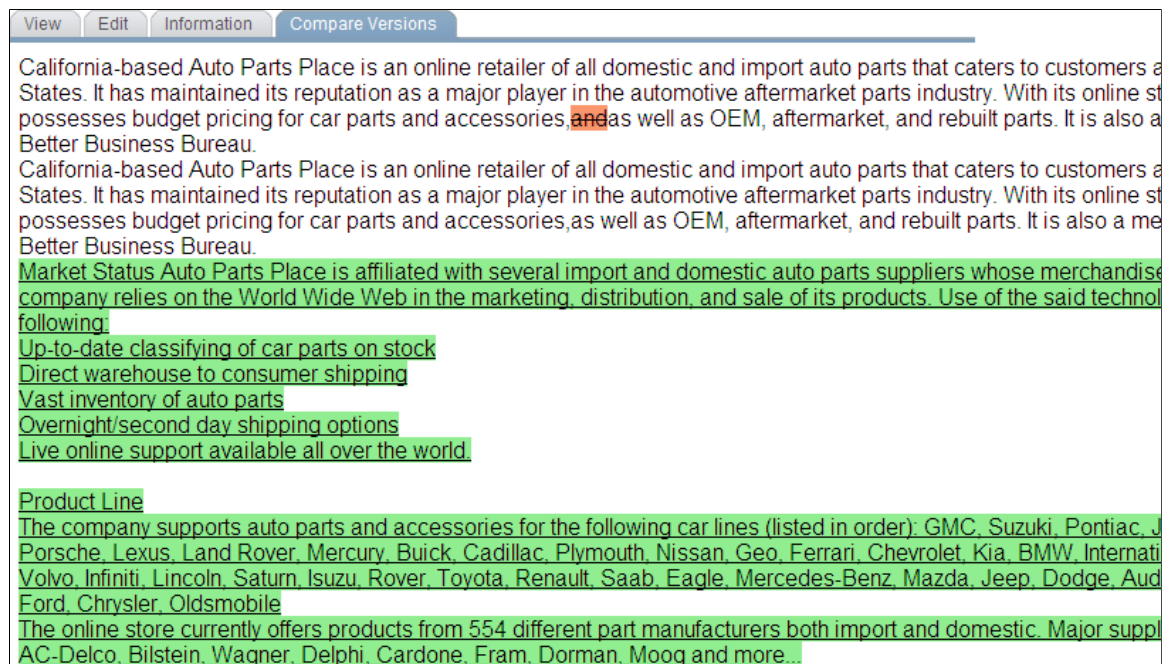
Important! No confirmation of your choice to restore a version appears.

Comparing Versions

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

Image: Compare Versions page (Wiki Content module)

This example illustrates the fields and controls on the Compare Versions page (Wiki Content module).



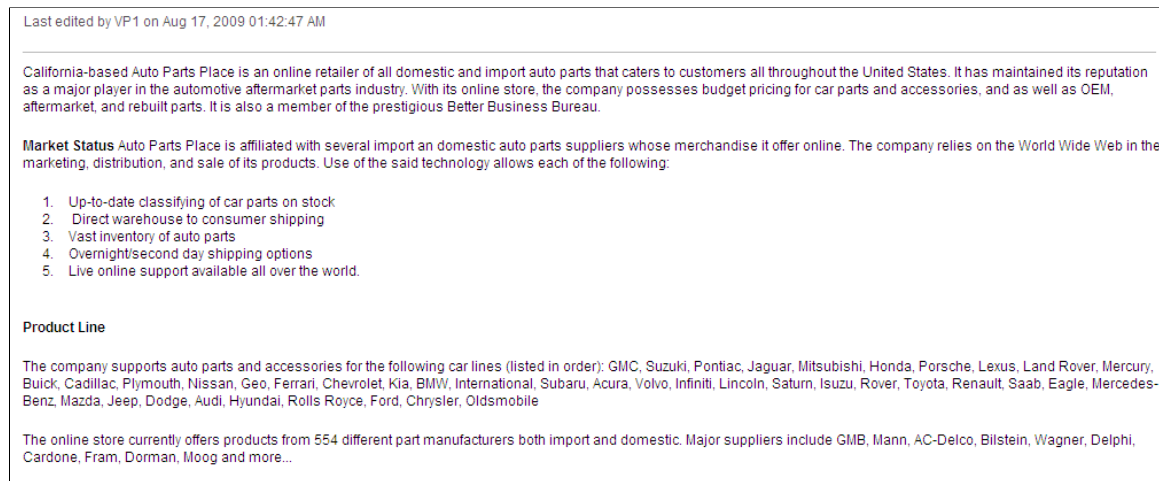
Use the Compare Versions page to compare the differences between two versions of the wiki content. Text that appeared in the older version but not in the newer version appears stricken through and highlighted in red. Text that appears in the newer version but not in the older version appears underlined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

Working With the Wiki Content Pagelet

Access the Wiki Content pagelet on the workspace homepage.

Image: Wiki Content pagelet

This example illustrates the fields and controls on the Wiki Content pagelet. You can find definitions for the fields and controls later on this page.



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

Edit Content

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

Using the Discussions Module

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

Understanding the Discussions Module

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

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.

See "Working With the Discussion Posts Pagelet" (PeopleSoft Interaction Hub 9.1: Using Portal Features).

The pages used to participate in discussions in the Discussions module are the same pages used for the Discussion Forums feature that is available from the PeopleSoft Interaction Hub homepage. When

you click the Discussions link in the workspace menu, you access the Discussion Forum page, which functions the same way as the Discussion Forum page functions in the portal. The Discussion Forum feature is documented in the [Using Portal Features](#)

See "Understanding Discussion Forums" (PeopleSoft Interaction Hub 9.1: Using Portal Features).

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

Related Links


[Using the Related Discussions Pagelet](#)

Using the Recent Discussions Pagelet

Access the Recent Discussions pagelet on the workspace homepage.

Image: Recent Discussions pagelet

This example illustrates the fields and controls on the Recent Discussions pagelet. You can find definitions for the fields and controls later on this page.

| Recent Discussions | | |
|---|--|---------------------------|
| Date | Recent Posts | Author |
| Jan 12 | Re[2]: New Employee Badges Yes - any badge issued prior to the first of this ... | Vice President of Finance |
| Jan 12 | Re: New Employee Badges Do we need to upgrade our existing badges if they ... | Context Item Tester User |
| Jan 12 | New Employee Badges Any employee who hasn't yet upgraded to the new em ... | Vice President of Finance |
| Jan 12 | Construction Update The construction on the new campus building is on ... | Vice President of Finance |
| Jan 12 | Re: What's the phone extension for the Facilities Help Desk? The number to call is 8-4444 to reach the Faciliti ... | Vice President of Finance |
| Jan 12 | Mobile Projectors for Presentations Is there any update to the process for requesting ... | Context ItemTester Admin |
| Jan 12 | What's the phone extension for the Facilities Help Desk? Does anyone know what the Facilities Help Desk pho ... | Context ItemTester Admin |
| View All Discussions  Feed ▼ | | Add Topic |

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

Recent Posts

Click a link in the Recent Posts column to view the Post Details page for that post.

View All Discussions

Click to access the Discussion Forum page of the Discussions module.



Move your mouse cursor over any of these to view the list of feeds published for the Discussions module of the workspace. Click any list item to open that feed document.

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

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

Add Topic

Click to access the Create New Topic page in the Discussions module.

Using the Documents Module

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

Understanding the Documents Module

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

The pages used to manage folders and documents in the Documents module are the same pages used in the content management system that is available from the PeopleSoft Interaction Hub homepage. When you click the Documents link in the workspace menu, you access the Documents page, which functions similarly to the way the Browse Managed Content pages function in the content management system. The content management system is documented in the Content Management System

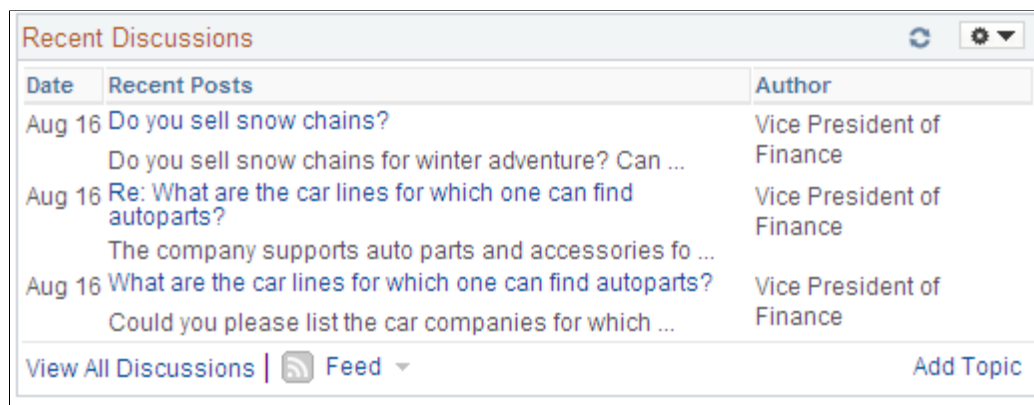
See "Understanding Managed Content" (PeopleSoft Interaction Hub 9.1: Content Management System).

Working With the Recent Documents Pagelet




Access the Recent Documents pagelet from the workspace homepage.

Image: Recent Documents pagelet

This example illustrates the fields and controls on the Recent Documents pagelet. You can find definitions for the fields and controls later on this page.



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

| | |
|---|---|
| Title | Click a link in the Title column to view the document. |
| Properties | Click a link in the Properties column to view the Properties page for the document. |
| View All Documents | Click to access the top folder of the Documents module. |
|    | <p>Move your mouse cursor over any of these icons to view the list of feeds published for the Documents module of the workspace. Click any list item to open that feed document.</p> <p>Click the Feed button or Feed link to open the first feed document in the list.</p> <p>Click the Open menu button to toggle the list of feeds between frozen open and closed.</p> |
| Add Document | Click to access the Add Document page to add a document to the top folder in the Documents module. |

Using the Blogs Module

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

Understanding the Blogs Module

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

The pages used to participate in blogging in the Blogs module are the same pages used for the Blogs feature that is available from the PeopleSoft Interaction Hub homepage. When you click the Blogs link in the workspace menu, you access the blog page, which functions the same way as the blog page functions in the portal. The Blogs feature is documented in the Using Portal Features

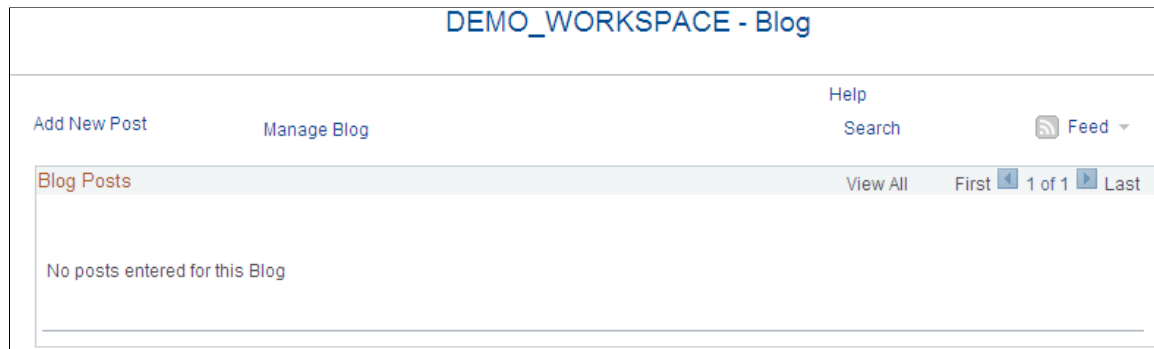
See "Understanding Blogs" (PeopleSoft Interaction Hub 9.1: Using Portal Features).

Working With the Blogs Pagelet

Access the Blogs pagelet on the workspace homepage.

Image: Blogs pagelet

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



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



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

<Workspace Name>

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

<Post Title> or <Comment Title>

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

Manage Blog

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

Search Blogs

Click to access the Search Workspaces page.

See [Searching Within Workspaces](#).



Move your mouse cursor over any of these icons to view the list of feeds published for the Blogs module of the workspace. Click any list item to open that feed document.

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

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

Using the Links Module

This section provides an overview of the Links module and discusses ways to add and maintain links and folders. It also discusses working with the Links pagelet and accessing the folder contents.

Pages Used in the Links Module

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|--|------------------------|--|
| Links Page | EPPCW_LKBROWSE | Add, edit, and delete folders and links in the Links module. |
| Folder Link Page | EPPCW_LKCONTENT | Add links to a folder. Access the link contents of a folder. |
| Link Properties Page | EPPCW_LKLINK | Add and maintain links in the Links module. See Adding a Link |
| Search Links Page | EPPCW_ADD_LINK | Search for blog posts, discussion topics, or workspaces to which to link. See Adding a Link |
| Key Name Mapping Page | EPPCW_LKKEYMAP | Select the keys that you want to pass to the link and provide optional new names for these keys. See Adding a Link |
| Select New Parent Folder Page | EPPCW_LKNEW_PRNT | View a graphical display of the collection of folders and links defined for the Links module and select the folder in which you want the selected link to reside. See Adding a Link |
| Folder Properties Page | EPPCW_LKFOLDER | Add and maintain folders in the Links module. |

Understanding the Links Module

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

You can include links to the following types of content:

- External URLs.
- PeopleSoft menu items.

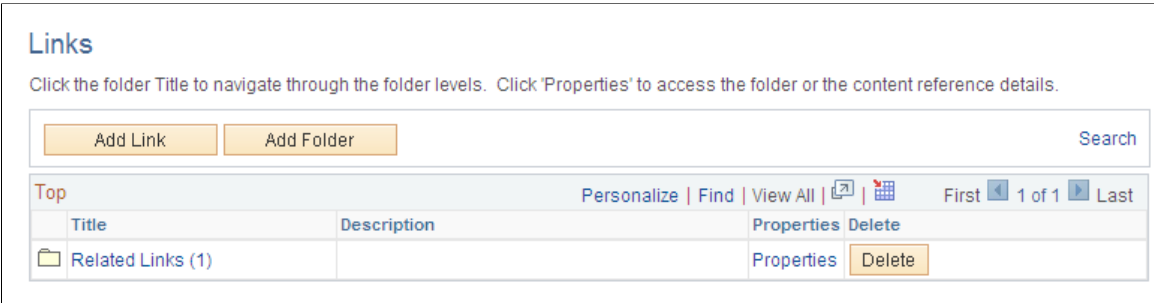
If you define a Link pagelet collection as a part of a workspace template, the collection will appear in the Link pagelet in any workspaces built by means of the template.

Links Page

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

Image: Links page

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



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

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

Add Link Click to access the Link Properties page.

Add Folder Click to access the Folder Properties page.

Search Click to access the Search page.

Top

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

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

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

Related Links

"Creating and Using Links with the Related Links Service" (PeopleSoft Interaction Hub 9.1: Using Portal Features)

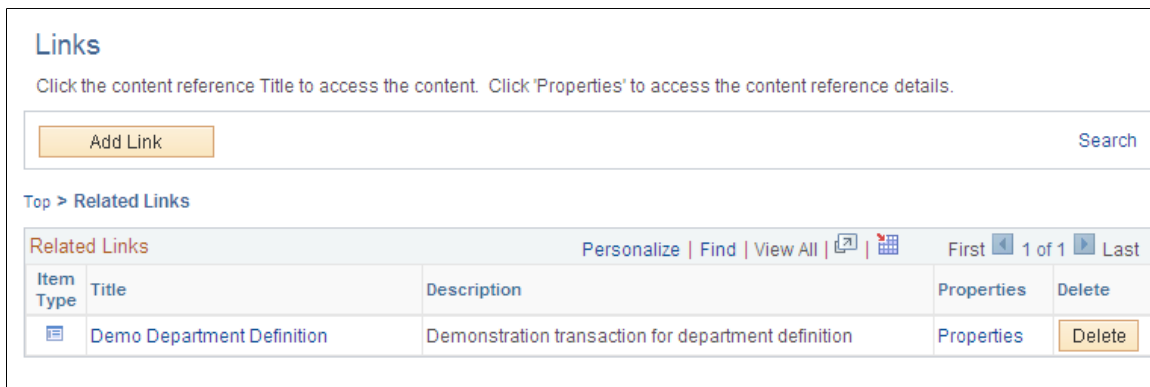
"Working With the Related Workspaces Pagelet" (PeopleSoft Interaction Hub 9.1: Using Portal Features)

Folder Link Page

Access the Links page (click the link for a folder on the Links page).

Image: Links page

This screenshot shows folder links on the Links page.



The elements on this page are the same as the elements on the Links page, with the exception that this page allows only the addition of and access to links in folders in the Links module.

The Links module allows the addition of one level of folders and does not allow the nesting of folders within folders. Use the Links page to add a first-level folder.

See [Links Page](#).

Adding a Link

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

Image: Link Properties page

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

Link Properties

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

Top > -- New Link --

*Label:

Long Description:
(254 Characters)

*Link Type:

Node Name:

URL:
(Example: <http://www.peoplesoft.com>)

Additional Options

☒ Use Contextual Data [Map Keys](#)

☒ Display on Welcome Page

☐ Open Link in New Window

Location

Parent Folder:

Placement in Folder:

Publishing Dates

Valid From:

Valid To:

[Return to Links](#)

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

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

Link Type

Select the link type:

- *External URL* — Select to add a link to an external URL. If selected, the URL field displays.
- *Menu Item* — Select to add a link to a PeopleSoft menu item. This establishes a link to a content reference in the portal registry. If selected, the Portal and Menu Item fields display.
- *Portal Blog* — Select to add a link to a portal blog post. Select the link on the Search Links page.
- *Portal Discussions* — Select to add a link to a discussion forum topic. Select the link on the Search Links page.
- *Workspace* — Select to add a link to a workspace. Select the link on the Search Links page.

URL

This field appears when the Link Type field is set to *External URL*. Enter the URL address of the website to which you want to create a link.

Portal

This field appears when the Link Type field is set to *Menu Item*. Select the portal in which the menu item for which you want to provide a link resides.

Menu Item

This field appears when the Link Type field is set to *Menu Item*. Select the menu item to which you want to provide a link.

Go to the Portal Registry Entry for this CREF

The field appears once link properties have been saved. Click to access the Content Ref Administration page for the menu item.

See the product documentation for *PeopleTools: Portal Technology*, “Administering Portals,” Administering Content References.

Additional Options**Use Contextual Data**

Select to use contextual data defined in the workspace to derive link content.

For example, if you create a workspace that contains contextual data to a specific transaction or URL, a link to the transaction or URL will automatically be added to the Related Links folder on the Links pagelet for the workspace.

Map Key

Click to display the Key Name Mapping page, enabling you to select the keys passed to the link.

Display on Welcome Page

Select to display the link in the Links pagelet on the workspace homepage.

Open Link in New Window

Select to indicate that, when this link is accessed, you want the link content to appear in a new window. If this option is not selected, then when this link is accessed, the link content is displayed within your workspace frame.

Location

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

Select New Parent Folder

Click to access the Select New Parent Folder page, where you can move the link to a folder other than the current folder.

Parent Folder

Displays the name of the parent folder of the link.

Placement in Folder

Select a value in the drop-down list box to change the placement of the link within its parent folder. Available placement values reflect saved link sequencing.

Publishing Dates**Valid From**

Enter a date on which the link will be valid. This is the date on which the link appears on the Links pagelet on the workspace homepage. If you do not enter a value, the link appears when the data is saved.

Valid To

Enter a date on which the link ceases to be valid. This is the date on which the link no longer appears in the Links pagelet on the workspace homepage. If you do not enter a value, the link does not expire.

Searching for a Link

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

Image: Search Links page

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

The screenshot shows the 'Search Links' page. At the top, there is a search bar with a text input field containing an asterisk (*), a dropdown menu for '*Link Type' set to 'Portal Blog', and a 'Search' button. Below this is a 'Search Results' section with a table. The table has four columns: 'Post', 'Blog Name', 'Creator', and 'Updated Date/Time'. There are 7 rows of results. The 6th row is highlighted in yellow. Below the table is a 'Link Label' section with a 'Return' button.

| Post | Blog Name | Creator | Updated Date/Time |
|---|-------------|---------------------------|---------------------|
| 1 Base Pay Increases Gone..Variable Pay is the New King | | Vice President of Finance | 01/12/2010 11:43 AM |
| 2 Connected Employees | | PeopleSoft Demo Role User | 09/24/2009 10:31 PM |
| 3 Preliminary HR survey results | | PeopleSoft Demo Role User | 09/18/2009 04:58 PM |
| 4 Smart HCM strategies | | PeopleSoft Demo Role User | 09/18/2009 04:59 PM |
| 5 Re: Welcome to VP's Blog | From the VP | Unger, Annette | 08/19/2009 08:45 AM |
| 6 Welcome to VP's Blog | From the VP | Vice President of Finance | 08/19/2009 08:32 AM |
| 7 An overview of my responsibilities | From the VP | Vice President of Finance | 08/19/2009 08:39 AM |

Link Label
Return

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

Search

Enter the search criteria.

Link Type

Select the link type:

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

Search

Click to perform the search.

Search Results

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

Return

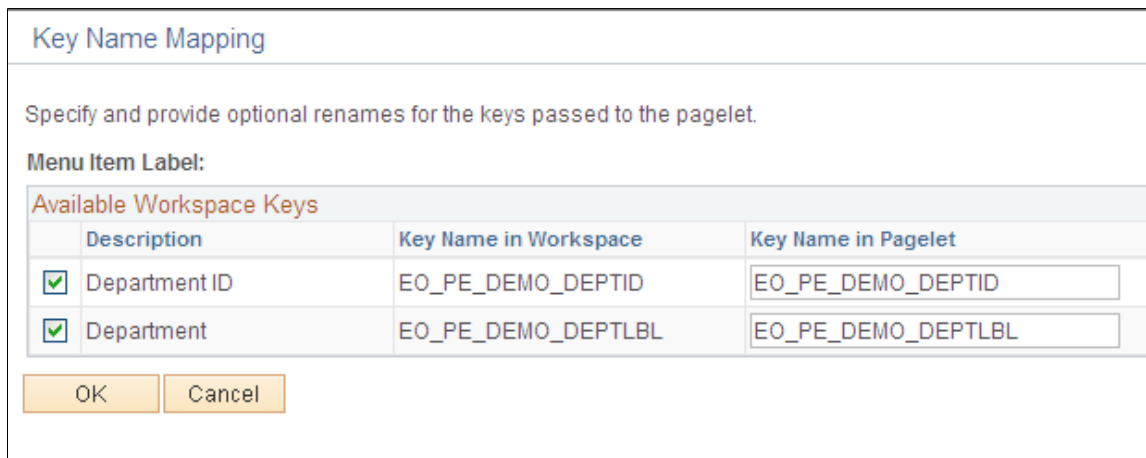
Once a link is selected, click the Return button to return to the Link Properties page.

Mapping Keys for a Link

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

Image: Key Name Mapping page

This example illustrates the fields and controls on the Key Name Mapping page.



Key Name Mapping

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

Menu Item Label:

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

OK Cancel

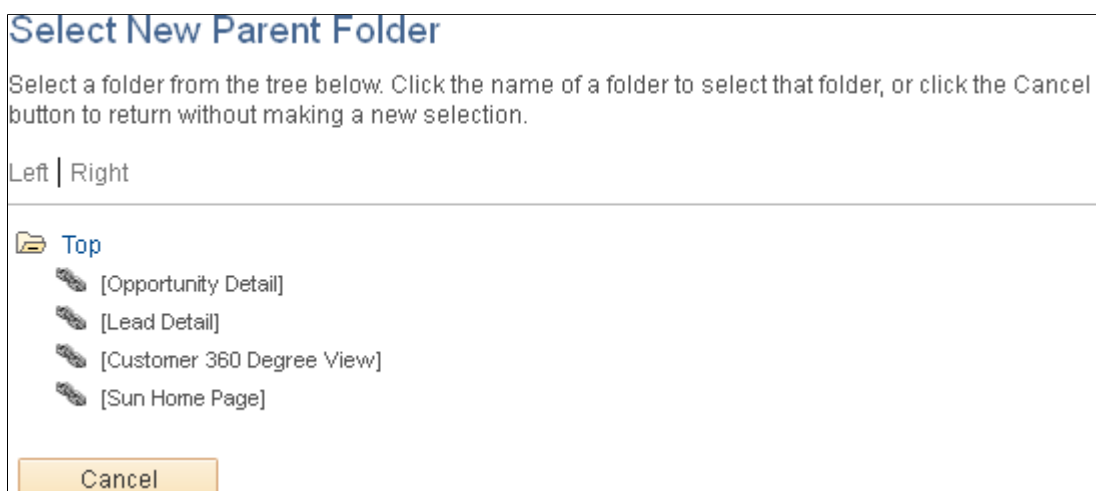
Select the keys that you want to pass to the link and provide optional new names for these keys.

Selecting a New Parent Folder for a Link

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

Image: Select New Parent Folder page






This example illustrates the fields and controls on the Select New Parent Folder page.



Select New Parent Folder

Select a folder from the tree below. Click the name of a folder to select that folder, or click the Cancel button to return without making a new selection.

Left | Right

- 
Top
 -  [Opportunity Detail]
 -  [Lead Detail]
 -  [Customer 360 Degree View]
 -  [Sun Home Page]

Cancel

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

Folder Properties Page

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

Image: Folder Properties page

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

Folder Properties
Define the folder properties and details.

Top > -- New Folder --

*Label:

Long Description:
(254 Characters)

▼ Additional Options

Location

Placement:

Publishing Dates

Valid From:

Valid To:

[Return to Links](#)

| | |
|--|---|
| Label | Enter the text that you want to appear as the folder name link used to access folder content. |
| Long Description | Enter a long description of the folder content, which will appear in the Description column on the Links page and as rollover text for the folder as it appears on the Links pagelet. |
| Go to the Portal Registry Entry for this folder | Click to access the Folder Administration page for the folder. See the product documentation for <i>PeopleTools: Portal Technology</i> , “Administering Portals,” Administering Folders. |
| Location | |
| Placement | Select a value in the drop-down list box to change the placement of the folder within the parent folder. Available placement |

values reflect saved folder sequencing. Placement options are not available for the Related Links folder.

Publishing Dates

Valid From

Enter the date on which you want the folder to be valid. This is the date on which the folder will appear on the Links pagelet on the workspace homepage. If you do not enter a value, the folder will appear when you save this page.

Valid To

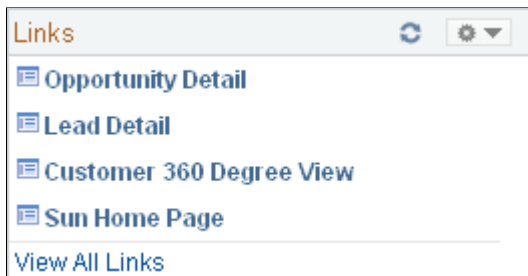
Enter the date on which you want the folder to cease being valid. This is the date on which the folder will no longer appear on the Links pagelet on the workspace homepage. If you do not enter a value, the folder will appear indefinitely when you save this page.

Working With the Links Pagelet

Access the Links pagelet from the workspace homepage.

Image: Links pagelet

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



Use the Links pagelet to access links added to the Links module. The Links pagelet displays links created in this workspace, including links created automatically by the system.

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

Links

Click a link in the Links column to open the link.

View All Links

Click to access the top folder of the Links module.

Related Links

"Creating and Using Links with the Related Links Service" (PeopleSoft Interaction Hub 9.1: Using Portal Features)

"Working With the Related Workspaces Pagelet" (PeopleSoft Interaction Hub 9.1: Using Portal Features)

Using the Action Item Lists Module

This section provides an overview of the Action Item Lists module and discusses how to use the Open Action Items pagelet.

Understanding the Action Item Lists Module

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

Action items are assignments or tasks that are assigned to workspace members and require some sort of activity, monitoring, or event to take place before they can be considered complete. These action items are organized into groups called *action item lists*. The list of action items appears in a flat view, with no nested hierarchy.

The pages used to manage lists and action items in the Action Item Lists module are the same pages used in the Action Item Lists feature that is available from the PeopleSoft Interaction Hub homepage. When you click the Action Item Lists link in the workspace menu, you access the Action Item Lists page, which functions similarly to the My Action Item Lists page in the portal. The Action Item Lists feature is documented in the [Using Portal Features](#)

See "Action Items Overview" (PeopleSoft Interaction Hub 9.1: Using Portal Features).

Working With the Open Action Items Pagelet

Access the Open Action Items pagelet on the workspace homepage.

Image: Open Action Items pagelet

This example illustrates the fields and controls on the Open Action Items pagelet. You can find definitions for the fields and controls later on this page.



| Due Date | Action Item | Assigned To |
|--|--|-----------------------|
| Oct 31 | Create powerpoint for demo | |
| Dec 22 | Update Office Information | Content Administrator |
| View All Action Item Lists | | |

Use the Open Action Items pagelet to review open action items in the Action Item Lists module. The pagelet also includes other convenient links for using the Action Item Lists module.

Action Item

Click a link in the Action Item column to view the Action Item Details page for that item.

View All Action Item Lists

Click to access the Action Item Lists page of the Action Item Lists module.

Using the Calendar Module

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

- Work with the Calendar pagelet.
- Work with the Upcoming Events pagelet.

Understanding the Calendar Module

Use the Calendar module to maintain and manage the workspace calendar and events to coordinate the activities of the workspace team. Workspace members can share, organize, and communicate about events that pertain to the workspace through the workspace calendar.

Using the Calendar module, you can:

- Schedule and display holidays.
- Synchronize events from holiday calendars to the workspace calendar.
- Specify weekends in the workspace calendar (in addition to the installation options).

Workspace members can also view calendar events in the Calendar pagelet and the Upcoming Events pagelet on the workspace homepage or in the full-page view in the Calendar module.

The pages used to manage the workspace calendar and events in the Calendar module are the same pages used in the Community Calendars feature that is available from the PeopleSoft Interaction Hub homepage. When you click the Calendar link in the workspace menu, you access the Calendar page, which functions similarly to the Calendar page in the portal. The Community Calendars feature is documented in the [Using Portal Features](#)

See "Understanding Community Calendars" (PeopleSoft Interaction Hub 9.1: Using Portal Features).

Working With the Calendar Pagelet

Access the Calendar pagelet on the workspace homepage.

Image: Calendar pagelet

This example illustrates the fields and controls on the Calendar pagelet.



Use the Calendar pagelet to view events from the workspace calendar. The Calendar pagelet can also be configured to display your tasks as well as action items from the workspace's action item list. To update or modify the event, click the event in the pop-up list.



Click the Personalize Calendar icon to access the Personalize My Calendar Events page.



Click the Prev button to view the calendar for the previous period (day, week, or month).



Click the Next button to view the calendar for the next period (day, week, or month).

<Date>

Move your mouse cursor over a date link to determine whether events are scheduled for that date; the date is highlighted in bold and a tool tip appears if events are scheduled for that date.

Click to display a pop-up list of events for that date. From the pop-up list, you can:

- Click an event link to access the View Event page for that event.
- Move your mouse cursor over Add Event to select the workspace calendar and then access the Event Details page to add an event.

Add Event

Click to access the Event Details page to add an event to the workspace calendar.

Full Page View

Click to access the full-page view of the Community Calendar page showing data from the workspace calendar.

Personalizing the Calendar Pagelet

Access the Personalize My Calendar Events page (click the Personalize Calendar icon in the Calendar pagelet).

You can customize the Calendar pagelet as follows:

- To display your tasks on the Calendar pagelet, select the Show My Task option.
- To display workspace action items on the Calendar pagelet, select an action item list.
- Select the period for the Calendar pagelet display: Daily, Weekly, or Monthly.

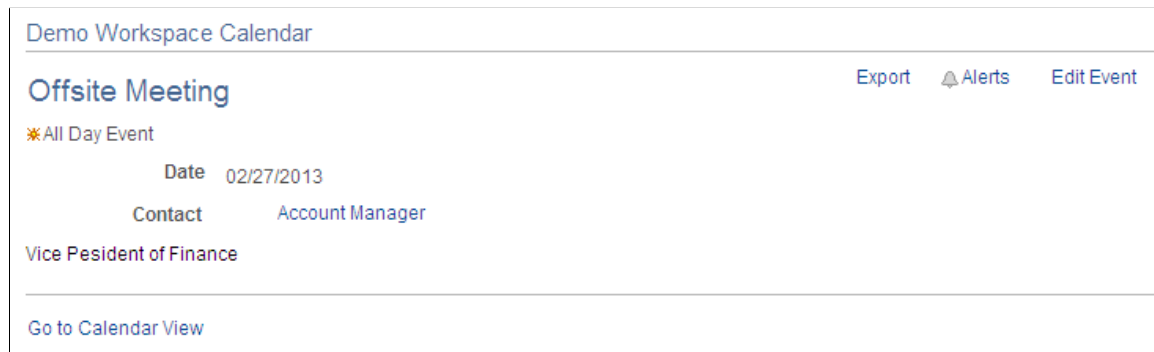
Note: By default, the workspace calendar is selected for display in the Calendar pagelet.

Working with the Upcoming Events Pagelet

Access the Upcoming Events pagelet on the workspace homepage.

Image: Upcoming Events pagelet

This example illustrates the fields and controls on the Upcoming Events pagelet. You can find definitions for the fields and controls later on this page.



Use the Upcoming Events pagelet to review upcoming events from the workspace calendar. The pagelet also includes other convenient links for using the Calendar module.

Note: Action items and tasks are not listed in the Upcoming Events pagelet.

Event

Click a link in the Event column to display the event view page for that event.

View All Events

Click to access the Calendar page of the Calendar module.

Using the Members Module

This section provides an overview of the Members module and discusses how to view member profiles and notify workspace members.

Pages Used in the Members Module

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|----------------------------|------------------------|---|
| <u>Members Page</u> | EPPCW_MBDIRECTORY | View members of the workspace. Access member profiles, which you can use to communicate with members by way of email and instant messaging. |
| <u>Member Profile Page</u> | EPPCW_MBRPROFILE | View details about a member. Access email and instant messaging functionality that you can use to communicate with the member. |
| <u>Notify Members Page</u> | EPPCW_MBNOTIFY | Send an email message to selected or all members of the workspace. |

Understanding the Members Module

The Members module enables workspace members to learn more about who the other members participating in the workspace are. Much of this information about members is shared by way of member profiles, which should be made available for all members in a workspace.

Two types of member profiles are available that can be displayed for a workspace member. If the PeopleSoft Interaction Hub Resource Finder feature has not been fully implemented or if it has been fully implemented but does not contain information for a member, the member profile will display data from the member's PeopleTools user profile (primarily from the PSOPRDEFN table).

If Resource Finder has been fully implemented, the Use Resource Finder for Profile Pages option has been selected on the Installation Options page, and Resource Finder data is available for the member, then the member profile is displayed by means of the Resource Finder participant profile.

The Members module also serves as a central point from which members can communicate with one another, providing easy access to email and instant messaging functionality. Email and instant messaging functionality is accessible from the member profile.

Related Links





"Understanding Instant Messaging in PeopleSoft Interaction Hub" (PeopleSoft Interaction Hub 9.1: Portal and Site Administration)

Members Page

Access the Members page (in the workspace menu, click the Members link).

Image: Members page

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

| Members | | | |
|---------------------------------------|---------------|--|---|
| Notify All Members | | Member Administration | |
| Member List Main Content | | Personalize Find   | First  1-19 of 19  Last |
| Member Name | Role | Email Address | Privilege Set |
| Content Administrator | PAPP_EMPLOYEE | | Viewer |
| Demo Test / Site Administrator | PAPP_EMPLOYEE | | Viewer |
| Context Item Tester Admin | PAPP_EMPLOYEE | admin@example.com | Viewer, Administrator |
| Context Item Tester Manager | PAPP_EMPLOYEE | mgr@example.com | Viewer, Moderator |
| Context Item Tester User | PAPP_EMPLOYEE | user@example.com | Viewer, Contributor |
| Demo Site Publisher | PAPP_EMPLOYEE | | Viewer |
| Demo Site Viewer | PAPP_EMPLOYEE | | Viewer |
| Presentation Administrator | PAPP_EMPLOYEE | | Viewer |
| Employee | PAPP_EMPLOYEE | | Viewer |
| Content Integration Admin | PAPP_EMPLOYEE | | Viewer |
| Navigation Administrator | PAPP_EMPLOYEE | | Viewer |
| Pagelet Administrator | PAPP_EMPLOYEE | | Viewer |
| Portal Administrator | PAPP_EMPLOYEE | | Viewer |
| Security Administrator | PAPP_EMPLOYEE | | Viewer |
| Site Management Administrator | PAPP_EMPLOYEE | | Viewer |
| Repository Administrator | PAPP_EMPLOYEE | | Viewer |
| PeopleSoft Demo Role User | PAPP_EMPLOYEE | | Viewer |
| Unger, Annette | PAPP_EMPLOYEE | | Viewer |
| Vice President of Finance | PAPP_EMPLOYEE | vp1@example.com | Viewer, Owner |

Notify All Members

Click to access the Notify Members page, where you can send an email message to all members. This button is available if at least one member has email set up.

Member Administration

Click to access the Administration - Members page, where you can add and delete workspace members, as well as manage member privileges.

Search

Click to access the Search page, where you can perform a search within the Members module.

Instant Messaging Indicator

If applicable, an instant messaging indicator appears for a member. Click an indicator that indicates that the member is online to send an instant message to the member.

Member Name

Click a member name to access the member's profile.

Role

Displays a member's role if the member is included in a PeopleTools-based role that has been included as a member of the workspace.

Email Address

If applicable, the member's email address appears. Click the link to send an email to the member.

Privilege Set

Displays the privilege set that the member has been assigned in the workspace.

See [Understanding Workspace Privilege Sets](#).

Member Profile Page

Access the Member Profile page (in the workspace menu, click the Members link; then click a link for the member's name on the Members page).

Image: Member Profile page

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

| Members | | |
|--|---------------|-----------------------|
| Notify All Members Member Administration | | |
| Member List Personalize Find First 1-19 of 19 Last | | |
| Member Name | Role | Privilege Set |
| Content Administrator | PAPP_EMPLOYEE | Viewer |
| Demo Test / Site Administrator | PAPP_EMPLOYEE | Viewer |
| Context Item Tester Admin | PAPP_EMPLOYEE | Viewer, Administrator |
| Context Item Tester Manager | PAPP_EMPLOYEE | Viewer, Moderator |
| Context Item Tester User | PAPP_EMPLOYEE | Viewer, Contributor |
| Demo Site Publisher | PAPP_EMPLOYEE | Viewer |
| Demo Site Viewer | PAPP_EMPLOYEE | Viewer |
| Presentation Administrator | PAPP_EMPLOYEE | Viewer |
| Employee | PAPP_EMPLOYEE | Viewer |
| Content Integration Admin | PAPP_EMPLOYEE | Viewer |
| Navigation Administrator | PAPP_EMPLOYEE | Viewer |
| Pagelet Administrator | PAPP_EMPLOYEE | Viewer |
| Portal Administrator | PAPP_EMPLOYEE | Viewer |
| Security Administrator | PAPP_EMPLOYEE | Viewer |
| Site Management Administrator | PAPP_EMPLOYEE | Viewer |
| Repository Administrator | PAPP_EMPLOYEE | Viewer |
| PeopleSoft Demo Role User | PAPP_EMPLOYEE | Viewer |
| Unger, Annette | PAPP_EMPLOYEE | Viewer |
| Vice President of Finance | PAPP_EMPLOYEE | Viewer, Owner |

Use the Member Profile page to view details about a member and to access links to contact the member through email or instant messaging.

Email Address

If an email address is defined for this user, click the email address link to access the Notify Members page to send an email to this user.

Send IM

If an instant messenger ID is defined for this user, click the Send IM icon button to start an instant messenger session.

User HR Data Attributes

View assigned business attributes for this user.

Business attributes are defined and maintained by the portal administrator.

See "Maintaining Business Attribute Definitions" (PeopleSoft Interaction Hub 9.1: Portal and Site Administration).

Edit My Profile

Click the Edit My Profile link to display the General Profile Information page, where you can update and edit your personal profile settings.

See the product documentation for *PeopleTools: Applications User's Guide*, "Setting User Preferences," Setting User Personalizations.

Edit My Instant Messaging Settings

Click the Edit My Instant Messaging Settings link to display the My Instant Messaging Information page, where you can update and edit your personal IM information.

See "Entering Your Instant Messaging Information" (PeopleSoft Interaction Hub 9.1: Using Portal Features).

Note: Member profiles generated using Resource Finder as its source display like Resource Finder participant profiles.

Notify Members Page

Access the Notify Members page (click the Notify All Members button on the Members 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.

Notify Members

A link to this Workspace will be included in the email message. Only members will be able to access the link.

To:

Email

Subject:

Message:

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

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

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

Using the Related Data Module

Access the Related Data module. (Click the Related Data link in the workspace menu.)

Image: Related Data module

This example illustrates the fields and controls on the Related Data module.



The Related Data module displays pagelets that have been selected on the Administration - Module page. This module can be used to display pagelets that are useful for the projects being worked on in the workspace.

Related Links

[Setting Up a Workspace](#)

Using the Related Discussions Pagelet

Access the Related Data module. (Click the Related Data link in the workspace menu.)

Image: Related Discussions pagelet

This example illustrates the fields and controls on the Related Discussions pagelet.



Use the Related Discussions pagelet to view and participate in related discussions that have been linked to the workspace. Related discussions are created and maintained on transaction pages through the Related Discussion related content service.

See "Managing Discussion Forums in the Related Discussion Service" (PeopleSoft Interaction Hub 9.1: Using Portal Features).

See "Participating in Discussion Forums in the Related Discussion Service" (PeopleSoft Interaction Hub 9.1: Using Portal Features).

A related discussion can be linked to a workspace through the Related Links related content service.

See "Creating and Using Links with the Related Links Service" (PeopleSoft Interaction Hub 9.1: Using Portal Features).

Using the Polls Module

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

Understanding the Polls Module

The Polls module enables workspace administrators to create poll questions and review poll results. Polls are a simple way for you to gather opinions and comments from workspace members using the Poll pagelet that is displayed on the workspace homepage. The Poll pagelet displays a single question and enables users to submit a response and add comments. Until a workspace member has answered the current question, the pagelet displays the poll question only. After a member has responded, the pagelet displays the current poll results.

The pages used to manage the workspace poll in the Polls module are the same pages used in the Polls feature that is available from the PeopleSoft Interaction Hub homepage. When a workspace administrator clicks the Polls link in the workspace menu, he or she accesses the Maintain Polls page, which functions similarly to the Maintain Polls page in the portal. The Polls feature is documented in the [Using Portal Features](#)

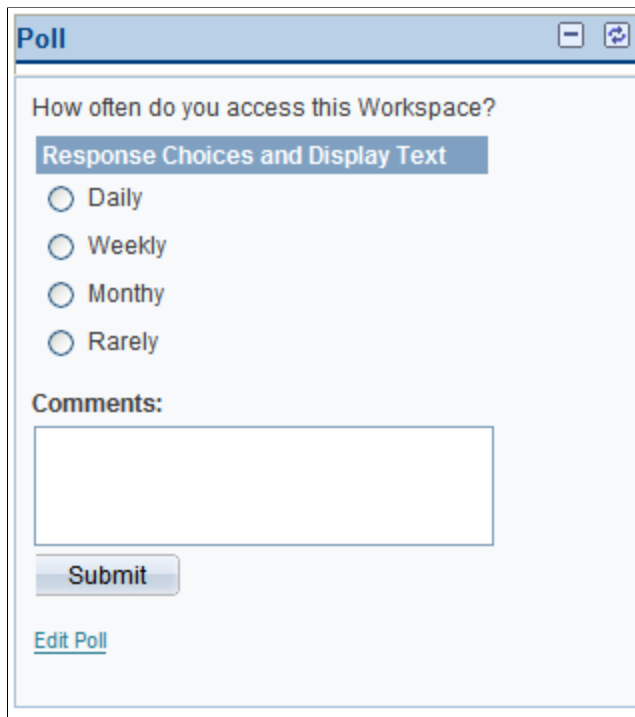
See "Understanding Polls" (PeopleSoft Interaction Hub 9.1: Using Portal Features).

Using the Poll Pagelet

Access the Poll pagelet on the workspace homepage.

Image: Poll pagelet (general workspace member before the poll question is answered)

This example illustrates the fields and controls on the Poll pagelet (general workspace member before the poll question is answered).



The screenshot shows a web-based poll interface. At the top, there is a header bar with the word "Poll" on the left and two small icons (a minus sign and a refresh icon) on the right. Below the header, the main content area has a light blue background. The first line of text is "How often do you access this Workspace?". Below this is a section titled "Response Choices and Display Text" in a blue box. Underneath this section are four radio button options: "Daily", "Weekly", "Monthly", and "Rarely". Below the radio buttons is a label "Comments:" followed by a large, empty rectangular text input field. At the bottom left of the form is a "Submit" button. At the bottom right, there is a link labeled "Edit Poll" in blue text.

Image: Poll pagelet (workspace administrator after the poll question is answered)

This example illustrates the fields and controls on the Poll pagelet (workspace administrator after the poll question is answered). You can find definitions for the fields and controls later on this page.

Maintain Polls

Question Details

Specify the question and available responses for the user responding to the poll. The Publish Date determines when the question becomes available. Only one question for a poll is published at a time. Enter up to six response choices for the question. Yes/No question types have preconfigured response choices.

Question Details

*Question Title:

*Question Text:

*Publish Date:

*Question Type:

Expire Date:

☒ Allow Free Form Comments

Response Choices and Display Text

| Response Choice | Response Text | | |
|--|--------------------------------------|--|---|
| <input type="text" value="Choice 01"/> | <input type="text" value="Daily"/> | | <input type="button" value="+"/> <input type="button" value="-"/> |
| <input type="text" value="Choice 02"/> | <input type="text" value="Weekly"/> | | <input type="button" value="+"/> <input type="button" value="-"/> |
| <input type="text" value="Choice 03"/> | <input type="text" value="Monthly"/> | | <input type="button" value="+"/> <input type="button" value="-"/> |
| <input type="text" value="Choice 04"/> | <input type="text" value="Rarely"/> | | <input type="button" value="+"/> <input type="button" value="-"/> |

Use the Poll pagelet to submit a response to the currently displayed poll question. After you have submitted a response, the pagelet displays the current poll results. If you are the workspace administrator, the pagelet also displays convenient links to help you maintain the poll and view complete results.

Response Choices

Select your response to this poll question from the available choices.

Comments

Enter your comments if the administrator has enabled comments for this poll question.

Submit

Click to submit your response to the poll.

After responding to a workspace poll, you will see the poll results displayed in the pagelet.

Edit Poll

If you are a workspace administrator, click this link to access the Maintain Polls page in the Polls module.

View Results

If you are a workspace administrator, click this link to access the Poll Results page in the Polls module.

Using the Browse Workspaces Module

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

See [Workspaces - Search Page](#).

See [Workspaces - Hierarchy Page](#).

See [Browse By Category Page](#).

Searching Within Workspaces

This section provides an overview of searching within workspaces.

Pages Used to Search Within a Workspace

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|--|------------------------|--|
| Search Page | EPPSR_SEARCH | Perform a search within all workspaces . |
| Search <Module> Page | EPPSR_SEARCH | Perform a search within the selected workspace module. |
| Search Tips | EPPSR_SEARCH_TIPS | Display search syntax and examples. |

Understanding Searching Within Workspaces

You can search for items within a workspace in one of two ways:

- Using the Search field in the workspace header.

When you use the Search field in the workspace header, your initial search scope is the current workspace.

- Using the Search link in selected workspace modules.

When you use the Search link in a selected workspace module, your initial search scope is that particular module. The following modules provide a Search link:

- Action Item Lists
- Blogs
- Calendar

- Discussions
- Documents
- Links
- Members

You create a workspace search index by deploying the PeopleSoft Interaction Hub delivered search definitions and categories and by building the workspace indexes.

Related Links

"Deploying Search Definitions and Categories" (PeopleSoft Interaction Hub 9.1: Portal and Site Administration)

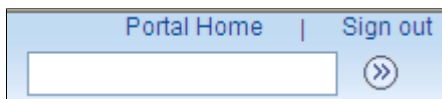
"Building Search Indexes" (PeopleSoft Interaction Hub 9.1: Portal and Site Administration)

Search Page

Access the Search field in the workspace header.

Image: Search field in the workspace header

This example illustrates the search field in the workspace header.



The Search field in the workspace header enables you to search in the current workspace.

To perform a search from the workspace header:

1. Click the cursor in the Search field in the workspace header.
2. Enter the search criteria.

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

3. Press Enter. Alternatively, click the Search button adjacent to the Search field.

The Search page appears displaying search results from the current workspace. The Facet area on the left side of the search results displays the modules and you can filter your search by module and drill down to the required information.

Image: Search page

This example illustrates the fields and controls on the Search page.

The screenshot shows a search interface with the following components:

- Search Header:** A search bar containing the text "compensation", a "Search" button, and a "Search Tips" link.
- Filters:**
 - All Workspaces:** A checkbox that is currently unchecked.
 - Search Within Results:** A checkbox that is currently unchecked.
- Filter by:**
 - Category:**
 - Workspace Action Items (2)
 - Workspace Blog Posts (1)
 - Workspace Discussion Posts (1)
 - Workspace Documents (1)
 - Workspace Wiki (1)
 - More...
 - Workspace:**
 - Compensation Manager Work..(7)
- Search Results:**
 - 7 results matched your search criteria**
 - Compensation Manager Workspace**
 - Last Updated Date: 2010-03-31 21:42:06
 - Workspace: **Compensation Manager Workspace** | Created By: PeopleSoft Demo Role User | For activities around planning and managing **compensation**
 - Review & Update Compensation Policies**
 - Last Updated Date: 2010-01-05 13:42:14
 - Workspace: **Compensation Manager Workspace** | Module: Action Items | List: **Compensation Manager Workspace** | Created By: |
 - Compensation Manager Workspace**
 - Last Updated Date: 2010-01-05 13:57:52
 - Workspace: **Compensation Manager Workspace** | Module: Wiki | Created By: PeopleSoft Demo Role User | For activities around planning and managing **compensation**
 - Compensation Policies US**
 - Last Updated Date: 2010-01-05 13:55:51
 - Module: DOC | Content ID: 2030 | Folder : 5 | Content Type : F |
 - Base Pay Increases Gone..Variable Pay is the New King**
 - Last Updated Date: 2010-01-12 11:43:14
 - Workspace: **Compensation Manager Workspace** | Module: Blogs | Created By: Vice President of Finance |
 - DEC. 16, 2009 — Long live the new King — base pay increases are dead**
 - Forecast 2010 Focal Budget Global**
 - Last Updated Date: 2010-01-05 13:43:02
 - Workspace: **Compensation Manager Workspace** | Module: Action Items | List: **Compensation Manager Workspace** | Created By: |

You can refine your results by selecting all workspaces or changing the search criteria.

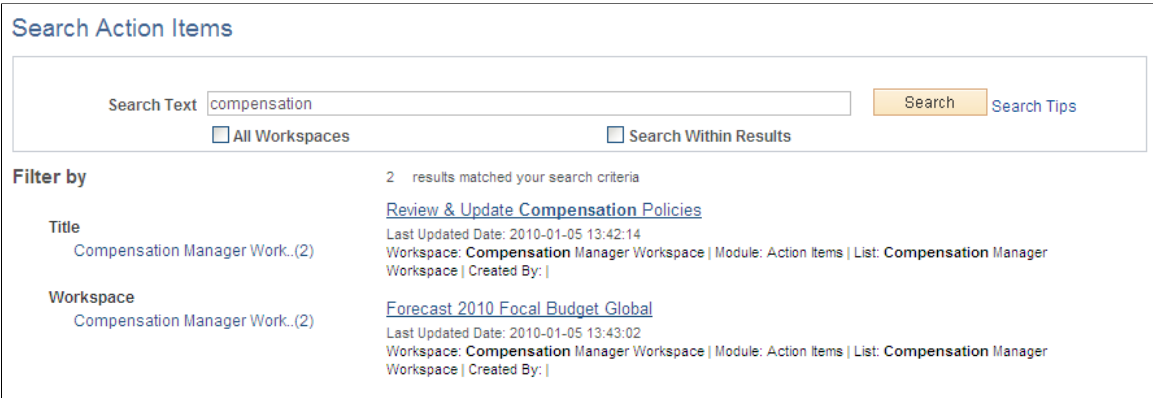
See [Search <Module> Page](#).

Search <Module> Page

Access the Search <Module> page (click the Search link in a specific workspace module).

Image: Search Action Items page

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



Use the Search <Module> page to specify search criteria including search text, workspace scope), and to filter the search by facets.

| | |
|-----------------------|---|
| Search Text | Enter the search criteria. |
| Search Tips | Click to display search syntax and examples on the Search Tips page. |
| All Workspaces | Select to search in all workspaces of which you are a member. |
| Search Within Results | Select to search within the search results. |
| Search | Click to perform the search. |
| Filter by | <p>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.</p> <p><i>Title:</i> Select a title to filter the search results by the selected title.</p> <p><i>Workspace:</i> Select a workspace to filter the search results by the selected workspace.</p> |
| Return to <Module> | If the search originated from a particular module, click to return to that module. |

Viewing and Subscribing to Feeds Within a Workspace

This section provides an overview of workspace feeds and lists the pages used to view and subscribe to feeds within a workspace.

Pages Used to View and Subscribe to Feeds Within a Workspace

| <i>Page Name</i> | <i>Definition Name</i> | <i>Usage</i> |
|---|------------------------|---|
| <Workspace Name> | EPPBL_VIEW_POSTS | Displays the feed for the Blogs module. See "Using My Blogs Page and <Blog Title> Homepage" (PeopleSoft Interaction Hub 9.1: Using Portal Features). |
| <Workspace Name> | EPPBL_VIEW_COMMENT | Displays the feed for the Blogs module. See "Blog Post Details Page" (PeopleSoft Interaction Hub 9.1: Using Portal Features). |
| Discussions Page | EPPDF_FORUM | Displays the feed for the Discussions module. See "Accessing Discussion Forums" (PeopleSoft Interaction Hub 9.1: Using Portal Features). |
| "Post Details Page" (PeopleSoft Interaction Hub 9.1: Using Portal Features) | EPPDF_VIEW_TOPIC | Displays the feed for the Discussions module. |
| Documents Page | EPPCM_HIER_MAIN | Displays the feed for the Documents module. See "Browse Managed Content Page" (PeopleSoft Interaction Hub 9.1: Content Management System). |

Understanding Workspace Feeds

A PeopleSoft Interaction Hub workspace has various types of content that is suitable for publication and consumption as feeds. Oracle has provided you with the tools within a workspace that facilitate the publication and consumption of this content as feeds.

Within a workspace, separate feeds can be published for each of three workspace modules—the Blogs module, the Discussions module, and the Documents module. The workspace administrator and certain other members with sufficient privileges can publish content from these three modules as a feed. Feed publication is documented in the *Using Portal Features*

See "Publishing PeopleSoft Interaction Hub Content as a Feed" (PeopleSoft Interaction Hub 9.1: Using Portal Features).

In addition, one or more feeds can be published for the entire workspace, each of which is known as a *workspace feed*. Only the workspace administrator can publish a workspace feed and is responsible for selecting which modules will be included in that feed. A workspace feed can be configured to include content from one or more of the following modules:

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

Publication of the workspace feed is covered within this PeopleBook.

See [Administering Workspace Feeds](#).

As a consumer of feed data, you can find feed documents that are accessible in convenient locations across the workspace—in the workspace header, in specific pagelets on the workspace homepage, and on the pages that you use to manage and create specific workspace content. Use the Feed button, Feed link, and Open menu button to view feed documents for content published within the workspace.



Move the cursor over either of these icons to view the list of feeds published for this item. Click any list item to open that feed document.

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



Move the cursor over this icon to view the list of feeds published for this item. Click any list item to open that feed document.

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

More information about viewing and subscribing to feeds can be found in the [Using Portal Features](#)

See "Viewing and Subscribing to Feeds" (PeopleSoft Interaction Hub 9.1: Using Portal Features).

Creating and Using Tags in Workspaces

This section provides an overview of tags in workspaces and discusses how to use the Tags pagelet.

Understanding Tags in Workspaces

Similar to portals and sites, you can create and view tags for blogs, blog postings, discussion forum topics, and documents found within the workspace. In addition, you can create and view tags for the workspace itself.

In a workspace, the Tags pagelet enables you to view the tags for the workspace itself, create tags for the workspace itself, and view a tag cloud encompassing all public tags used within the workspace.

The page controls that are used to create and view tags for blogs, blog postings, discussion forum topics, and documents within a workspace are similar to the page controls that are used within a portal. In addition, the Search Tags page that is available in a workspace is similar to the Search Tags page that is available from the PeopleSoft Interaction Hub homepage with an additional scope for the current workspace. These aspects of the tagging feature are documented in the [Using Portal Features](#)

See "Understanding Tagging in PeopleSoft Interaction Hub" (PeopleSoft Interaction Hub 9.1: Using Portal Features).

Using the Tags Pagelet

This section discusses how to:

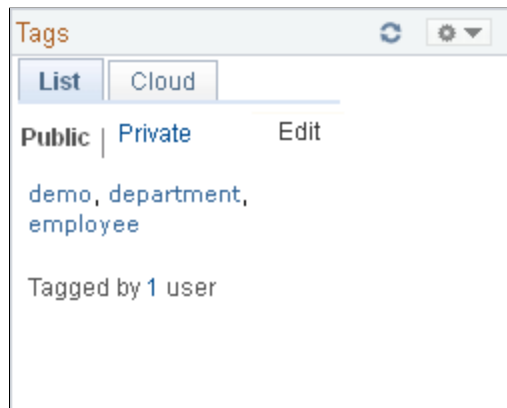
- View the workspace tag list.
- Create workspace tags.
- View the workspace tag cloud.

Viewing the Workspace Tag List

Access the Tags pagelet on the workspace homepage.

Image: Tags pagelet: List tab (view mode)

This example illustrates the fields and controls on the Tags pagelet: List tab (view mode). You can find definitions for the fields and controls later on this page.



Use the List tab of the Workspace pagelet to view the list of tags for the workspace itself.

Cloud

Select to view the tag cloud for all public tags that are used within the workspace.

Public

Select to view all public tags for the workspace itself.

Private

Select to view all of your private tags for the workspace itself.

Edit

Click the Edit button to edit your public or private tags for the workspace itself.

<tag>

Click a tag to go to the Search Tags page to view a list of items within the workspace that is tagged with that tag.

<#> users

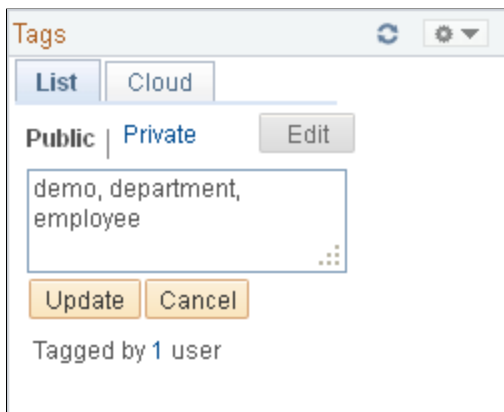
Move the cursor over the number of users to view which users have tagged the workspace.

Creating Workspace Tags

Access the Tags pagelet on the workspace homepage; then click the Edit button.

Image: Tags pagelet: List tab (edit mode)

This example illustrates the fields and controls on the Tags pagelet: List tab (edit mode). You can find definitions for the fields and controls later on this page.



Use the List tab of the Workspace pagelet to edit your tags for the workspace itself.

Cloud

Select to view the tag cloud for all public tags that are used within the workspace.

Public

Select to edit your public tags for the workspace itself.

Private

Select to edit your private tags for the workspace itself.

<tag>

Enter tags or tag phrases separated with a comma.

<#> users

Move the cursor over the number of users to view which users have tagged the workspace.

Update

Click the Update button to save your changes.

Cancel

Click the Cancel button to cancel any changes.

Viewing the Workspace Tag Cloud

Access the Cloud tab. (Select Cloud in the Tags pagelet).

Image: Tags pagelet: Cloud tab

This example illustrates the fields and controls on the Tags pagelet: Cloud tab. You can find definitions for the fields and controls later on this page.



Use the Cloud tab to view the tag cloud of all public tags used within the workspace.

List Select to view the list of tags for the workspace itself.

<tag> Click a tag to go to the Search Tags page to view a list of items within the workspace tagged with that tag.

Working with Additional Workspace Pagelets

Additional pagelets are included with each workspace and can be added to the workspace homepage. These pagelets include:

- Email pagelet
- Feed Reader pagelet

Working with the Email Pagelet

The Email pagelet in workspaces is the same as the Email pagelet that can be added to the portal homepage.

See "Working With the Email Pagelet" (PeopleSoft Interaction Hub 9.1: Using Portal Features).

Working with the Feed Reader Pagelet

The Feed Reader pagelet in workspaces is the same as the Feed Reader pagelet that can be added to the portal homepage.

See "Working With the Feed Reader Pagelet" (PeopleSoft Interaction Hub 9.1: Using Portal Features).