

**Oracle® Retail Workspace**

Implementation Guide

Release 13.0

April 2008

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Primary Author: Nathan Young

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## 9 Troubleshooting



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# Preface

The Oracle Retail Workspace Implementation Guide provides detailed information useful for implementing the application. It helps you to view and understand the behind-the-scenes processing of the application. In addition, this implementation guide includes information about customizing Oracle Retail Workspace and a tutorial on developing dashboards.

## Audience

The Implementation Guide is intended for Oracle Retail Workspace application integrators and implementation staff.

## Related Documents

For more information, see the following documents in the Oracle Retail Workspace Release 13.0 documentation set:

- *Oracle Retail Workspace Release Notes*
- *Oracle Retail Workspace Installation Guide*
- *Oracle Retail Workspace Administration Guide*
- *Oracle Retail Workspace Online Help*

## Customer Support

- <https://metalink.oracle.com>

When contacting Customer Support, please provide:

- Product version and program/module name
- Functional and technical description of the problem (include business impact)
- Detailed step-by-step instructions to recreate
- Exact error message received
- Screen shots of each step you take

## Review Patch Documentation

For a base release (".0" release, such as 13.0), Oracle Retail strongly recommends that you read all patch documentation before you begin installation procedures. Patch documentation can contain critical information related to the base release, based on new information and code changes that have been made since the base release.

## Oracle Retail Documentation on the Oracle Technology Network

In addition to being packaged with each product release (on the base or patch level), all Oracle Retail documentation is available on the following Web site:

[http://www.oracle.com/technology/documentation/oracle\\_retail.html](http://www.oracle.com/technology/documentation/oracle_retail.html)

Documentation should be available on this Web site within a month after a product release. Note that documentation is always available with the packaged code on the release date.

## Conventions

The following text conventions are used in this document:

Convention	Meaning
<b>boldface</b>	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

## Open-Source Third Party Applications for Oracle Retail Workspace

Software Provider: Apache Software Foundation

Software Name: Apache Commons

Software Version: 1.1

Jar File Name: commons-logging-1.1.jar

Provider Web Site: <http://jakarta.apache.org/commons/>

Software Provider: Apache Software Foundation

Software Name: Apache log4j

Software Version: 1.2.13

Jar File Name: log4j-1.2.13.jar

Provider Web Site: <http://logging.apache.org/log4j>

Software Provider: Apache Software Foundation

Software Name: Jakarta-ORO  
Software Version: 2.0.5  
Jar File Name: jakarta-oro-2.0.5.jar  
Provider Web Site: <http://jakarta.apache.org/oro/>

Software Provider: Apache Software Foundation  
Software Name: Jakarta Regexp  
Software Version: 1.1  
Jar File Name: jakarta-regexp-1.1.jar  
Provider Web Site: <http://jakarta.apache.org/regexp/>

Software Provider: Apache Software Foundation  
Software Name: Apache Xerces  
Software Version: J\_1.4.0-xml  
Jar File Name: xerces-J\_1.4.0-xml.jar  
Provider Web Site: <http://xerces.apache.org/>

Software Provider: Intalio Inc., and others  
Software Name: Castor XML code generator  
Software Version: 1.1.1  
Jar File Name: castor-1.1.1-codegen.jar  
Provider Web Site: <http://www.castor.org/>

Software Provider: Intalio Inc., and others  
Software Name: Castor XML data binding framework  
Software Version: 1.1.1  
Jar File Name: castor-1.1.1-xml.jar  
Provider Web Site: <http://www.castor.org/>

Software Provider: Sun Microsystems  
Software Name: Java Mail  
Software Version: 1.4  
Jar File Name: mail.jar  
Provider Web Site: <http://java.sun.com/products/javamail/>



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# Introduction

This implementation guide serves as a reference to explain backend processes for Oracle Retail Workspace.

## What is Oracle Retail Workspace?

Oracle Retail Workspace (ORW) provides a single point of access to Oracle Retail applications used by your business. It gives a business an integrated platform from which to access operational and analytical information through dashboards and reports from both internal and external sources.

The ORW application provides the following features:

- **Dashboards**—The ORW application provides the ability to hook-up custom dashboards displaying a snapshot of one's business. The sample dashboards included with ORW illustrate the technology and portlets that are available to achieve that.
- **Launch Pad**—The ORW application serves as a launch pad for your Oracle Retail applications and reports, allowing access to them from a single point, without the need to log in many times.
- **Reports**—The ORW application integrates with the Oracle Business Intelligence Enterprise Edition (OBI EE) and Business Intelligence Publisher (BIP) reports servers.
- **Oracle Internet Directory Delegated Administrative Services**—Many of the user and administrative tools in the ORW navigation panel are links to the Oracle Internet Directory (OID) Delegated Administrative Services (DAS) application.



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# Backend System Administration and Configuration

This chapter of the implementation guide is intended for administrators who support and monitor the running system. The content in this chapter is not procedural, but is meant to provide descriptive overviews of the key system parameters.

## Configuration Files

When retailers install ORW into their environment, they must update the values for certain key system configuration parameters to their specific settings. These system configuration parameters are described in this section. The parameters that retailers should not have to change are not included in this section.

There are two configuration files a client would normally edit:

- [retail-workspace-page-config.xml](#)
- [ldap-config.xml](#)

These files are found in the following directory:

```
$ORACLE_HOME/j2ee/<oc4j instance>/RetailWorkspace
```

*<oc4j instance>* is the name of the OC4J instance where ORW is installed.

### retail-workspace-page-config.xml

The `retail-workspace-page-config.xml` file contains the work lists, work items, secure work items, and default home pages for ORW.

The ORW installer prompts for the retail application URLs and parameters to populate the file. If the Oracle Retail applications are installed prior to ORW, these can be entered at install time. However, if a retailer installs a new application after ORW is installed, the `retail-workspace-page-config.xml` file needs to be edited to reflect the new application.

The file, as supplied in the release, is an example configuration, specifying demonstration dashboards and an artificial classification of applications into a sub-tree of Single Sign-on (SSO) and non-SSO applications. It is very likely that retailers will customize this file after initial installation.

In the following example, the entry for Oracle Retail Merchandising System (RMS) consists of the main URL string plus one parameter named **config**. The installer prompts for these values and inserts them into the property files. The installer property files hold the values for the `deploy.retail.product.rms.url` and `deploy.retail.product.rms.config` properties.

```
<url>@deploy.retail.product.rms.url@</url>
<parameters>
  <parameter name="config">
    <value>@deploy.retail.product.rms.config@</value>
  </parameter>
</parameters>
```

Suppose RMS was installed on `mycomputer.mycompany.com`, port `7777`, using a standard installation and configured with the application name of **rmsprod**. To access RMS directly from a browser, enter the following:

```
http://mycomputer.mycompany.com:7777/forms/frmservlet?config=rmsprod
```

After installation, the values used to access the application in the `retail-workspace-page-config.xml` file would be similar to the following:

```
<url>http://mycomputer.mycompany.com:7777/forms/frmservlet</url>
<parameters>
  <parameter name="config">
    <value>rmsprod</value>
  </parameter>
</parameters>
```

ORW is configured with a default `retail-workspace-page-config.xml` file. This file has a simple XML structure that relies on the JSF expression language (EL) for flexibility. Configurable properties can be defined inline with a static, constant value. Several of the properties may also be configured using a JSF EL expression that is evaluated at run time.

The following elements are in alphabetical order, not order of appearance.

## Top Level Element

### ■ **retail-portal-page**

The `<retail-portal-page>` element is the root of the configuration information hierarchy, and contains nested elements for all of the other configuration settings. The `<retail-portal-page>` has the following attributes:

- `application-title` : specifies the application's title in the browser. This defaults to Oracle Retail Workspace if not specified. (optional)
- `branding-app-text` : specifies the application name in the header. Defaults to Retail Workspace if not specified. (optional)
- `branding-alt-text` : specifies the 'alt' text for the corporate branding image. Defaults to Oracle if not specified. (optional)

### **retail-portal-page Child Elements**

- [branding-uri](#)
- [home](#)
- [navigation-lists](#)
- [resource-bundles](#)

## Definition Elements

### ■ **biee-reports-work-item**

The `<biee-reports-work-item>` element specifies a work item for BIEE reports. The `<biee-reports-work-item>` has the following attributes:

- id : specifies the unique ID for this object (required)
- display-string : specifies the display string for this element (required)
- rendered : specifies if this element is to be rendered or not (required)
- tooltip : specifies the tooltip string. If not specified, defaults to value of display-string attribute. (optional)
- launchable : specifies if this element is launchable or not. Defaults to false. (optional)
- show-in-content-area : boolean value to specify if the launched URL should show in the content area. Defaults to false. (optional)
- target-frame : specifies a string that indicates the target frame. If not specified, defaults to "\_blank" if show-in-content-area is false. (optional)

#### **bicc-reports-work-item Child Elements**

- [custom-attributes](#)
- [parameters](#)

#### ■ **bip-reports-work-item**

The <bip-reports-work-item> element specifies a work item for BIP reports. The <bip-reports-work-item> has the following attributes:

- id : specifies the unique ID for this object (required)
- display-string : specifies the display string for this element (required)
- rendered : specifies if this element is to be rendered or not (required)
- tooltip : specifies the tooltip string (optional)
- launchable : specifies if this element is launchable or not (optional)
- show-in-content-area : boolean value to if the launched URL should show in the content area (optional)
- target-frame : specifies a string that indicates the target frame (optional)

#### **bip-reports-work-item Child Elements**

- [custom-attributes](#)
- [parameters](#)

#### ■ **child-work-items**

The <child-work-item> element specifies the child <work-item> and/or <secure-work-item> elements for work item.

Work items and work lists are heirarchical. The <child-work-item > element holds the children of the current work item. This is also an optional element.

#### **child-work-items Child Elements**

- [work-items](#)
- [secure-work-item](#)

#### ■ **custom-attribute**

The <custom-attribute> specifies a custom attribute key-value pair. The <custom-attribute> has the following attributes:

- name : specifies a string that is the name of the custom attribute (required)

- **custom-attributes**

The <custom-attributes> element specifies one to many <custom-attribute> elements (optional)

**custom-attributes Child Elements**

- [value](#)

- **homes**

The <homes> element specifies the home elements for ORW. This element can contain multiple <home> elements.

**homes Child Elements**

- [home](#)

- **navigation-lists**

The <navigation-lists> element currently supports only one <navigation-list>

**navigation-lists Child Elements**

- [navigation-list](#)

- **navigation-list**

ORW supports only one navigation list child element for the <navigation-lists> element. The <navigation-list> has the following attributes:

- `id` : the unique ID for the navigation list (required)

**navigation-list Child Elements**

- [work-lists](#)
- [secure-work-list](#)

- **parameters**

The <parameters> elements specifies one to many <parameter > elements.

**parameters Child Elements**

- [parameter](#)

- **parameter**

The <parameter> element specifies a query string parameter name-value pair. The <parameter> has the following attributes:

- `name` : specifies a string that is the name of the URL query string parameter (required)

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**Note:** ORW supports only ASCII characters in the parameter "name" attribute.

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**parameter Child Elements**

- [value](#)

- **resource-bundles**

The <resource-bundles> element specifies the resource bundles for ORW. This element can contain multiple <resource-bundle> elements.

**resource-bundles Child Elements**

- [resource-bundle](#)

**■ secure-work-item**

The <secure-work-item> element is a child element of <work-list> or <secure-work-list>. The <secure-work-item> has the attributes:

- id : specifies the unique ID for this object (required)
- display-string : specifies the display string for this element (required)
- rendered : specifies if this element is to be rendered or not (required)
- tooltip : specifies the tooltip string (optional)
- launchable : specifies if this element is launchable or not. defaults to false. (optional)
- show-in-content-area : boolean value to specify if the launched URL should show in the content area. Defaults to false (optional)
- target-frame : specifies a string that indicates the target frame. If not specified, defaults to "\_blank" if show-in-content-area is false. (optional)

**secure-work-item Child Elements**

- [child-work-items](#)
- [url](#)
- [parameters](#)

**■ secure-work-list**

The <secure-work-list> element contains one or more <work-item> and/or <secure-work-item> elements. The <secure-work-list> has the following attributes:

- id : specifies the unique ID for this object (required)
- display-string : specifies the display string for this element (required)
- tooltip : specifies the tooltip string (optional)
- rendered : specifies if the work list is to be rendered or not (required)

**secure-work-list Child Elements**

- [icon-uri](#)
- [work-item](#)
- [secure-work-item](#)

**■ work-item**

The <work-item> elements is a child element of either <work-list> or <secure-work-list> element. The <work-item> has the following attributes:

- id : specifies the unique ID for this object (required)
- display-string : specifies the display string for this element (required)
- rendered : specifies if this element is to be rendered or not (required)
- tooltip : specifies the tooltip string. If not specified, defaults to value of display-string attribute. (optional)
- launchable : specifies if this element is launchable or not. Defaults to false. (optional)

- `show-in-content-area` : boolean value to specify if the launched URL should show in the content area. Defaults to false. (optional)
- `target-frame` : specifies a string that indicates the target frame. If not specified, defaults to "\_blank" if `show-in-content-area` is false. (optional)

**work-item Child Elements**

- [child-work-items](#)
- [url](#)
- [parameters](#)

**■ work-items**

The `<work-items>` element specifies one to many `<work-item>` or `<secure-work-item>` elements.

**work-items Child Elements**

- [work-item](#)
- [secure-work-item](#)

**■ work-list**

The `<work-list >` element contains one or more `<work-item>` and/or `<secure-work-item>` elements. The `<work-list>` element has the following attributes:

- `id` : specifies the unique ID for this object (required)
- `display-string` : specifies the display string for this element (required)
- `tooltip` : specifies the tooltip string. Defaults to value of `display-string` if not specified. (optional)
- `rendered` : specifies if the work list is to be rendered or not. Defaults to true. (required)

**work-list Child Elements**

- [icon-uri](#)
- [work-item](#)
- [secure-work-item](#)

**■ work-lists**

The `<work-lists>` element can contain one or more `<work-list>` or `<secure-work-list>` elements.

**work-lists Child Elements**

- [work-list](#)
- [secure-work-list](#)

**Subordinate Elements****■ branding-uri**

The `<branding-uri>` element specifies the URI for the branding (logo) image.

**■ home**

The <home> element specifies a home work item to add to the list of homes. Specifies a "name-value" pair that associates a role name with a work item. The <home> element has the following attributes:

- role : the role name (required)
- value : specifies the ID of the <work-item> or <secure-work-item> elements that will be launched as the home page. (required)

- icon-uri

The <icon-uri> element specifies the URI that represents the icon.

- resource-bundle

The <resource-bundle> element specifies the resource bundle. The <resource-bundle> has the following attributes:

- var - key for the resource bundle (required)
- resource-bundle - value of the resource-bundle (required)

- url

The <url> element specifies the url to launch when the user clicks on this work item

- value

The <value> element specifies the URL parameter value or custom attribute value.

## ldap-config.xml

The `ldap-config.xml` file lists LDAP connection information that the application uses to look up specific user information and administer .

The following XML elements are found in this file:

- <login-dn>—Contains the ORW application login distinguished name. This distinguished name must be granted proxy privileges and have the ability to look up user information. In the supplied LDIF scripts, the following entry is created with the necessary privileges:

```
orclApplicationCommonName=RetailWorkspace,cn=RetailWorkspace,cn=Products,
cn=OracleContext
```

The password for this distinguished name must be stored in the ORW wallet.

- <realm-policy-dn>—The distinguished name where the policy information is stored. This is used by the permissions management screen to read, update, and delete . The value assigned to this element must be the same as the value used by the OC4J application server.
- <realm-dn>—The distinguished name of the realm associated with the ORW application.
- <realm-name>—The realm nickname. Usually the most significant part of the <realm-dn> entry. For example, the **us** realm name would normally be associated with a <realm-dn> of `dc=us,dc=mycompany,dc=com`.
- <host>—The host name of the computer hosting the OID LDAP server. This may be a virtual IP address.

- `<port>`—A port number that the OID LDAP server is using to listen for connections. This port may be SSL or non-SSL. By default, OID listens for SSL connections on port 636 and non-SSL connections on port 389.
- `<ssl>`—A value of **true** implies the port number is for SSL connections. A value of **false** is for non-SSL connections.
- `<password-location>`—The location of the Oracle Wallet storing the application password. ORW looks up the password from this wallet via the `ldap-user-pw` alias. This wallet may store additional passwords as well.

Below is an example of an `ldap-config.xml` file:

```
<ldap-config>
<login-dn>orclApplicationCommonName=RetailWorkspace,cn=RetailWorkspace,
  cn=Products,cn=OracleContext</login-dn>
<realm-policy-dn>cn=Policy,cn=JAZNContext,cn=products,cn=OracleContext,dc=us,
  dc=oracle,dc=com</realm-policy-dn>
  <realm-dn>dc=us,dc=mycompany,dc=com</realm-dn>
  <realm-name>us</realm-name>
  <host>localhost</host>
  <port>636</port>
  <ssl>>true</ssl>
  <password-location>/home/oas1/product/10.1.3.2.0/OracleAS_4/j2ee/home/
    RetailWorkspace/ldapWallet</password-location>
</ldap-config>
```

## Logging

### Jakarta Commons Logging

The API that ORW components work with is built using the Jakarta Commons Logging package. Commons logging provides an ultra-thin bridge between different logging libraries, enabling the ORW application to remain reasonably pluggable with respect to different logger implementations. Objects in ORW that require logging functionality maintain a handle to a Log object, which adapts logging requests to the runtime configurable logging provider.

Additional information about Jakarta Commons Logging can be found at the following websites:

- <http://jakarta.apache.org/commons/logging/>
- <http://jakarta.apache.org/commons/logging/api/index.html>

### OC4J Logging

The default logging mechanism used by ORW is OC4J loggers. The logging levels for the application can be controlled by the Enterprise Manager administration application. Additional control of these loggers can be done via the file, `$ORACLE_HOME/j2ee/<OC4J instance>/config/j2ee-logging.xml`.

The following types of loggers may be of interest to an administrator or developer:

- `oracle.adf.share.*`—ADF specific loggers.
- `oracle.retail.*`—ORW application specific loggers
- `oracle.j2ee.*`—Oracle application server loggers.

Note that there may be multiple loggers involved in a single over-arching area. For example, one may want to enable a **FINE** level of logging to both the `oracle.j2ee.security` and `oracle.adf.share.security` loggers.

See the *Oracle Application Server Administration Guide* for more details.

## Internationalization

Internationalization is the process of creating software that is able to be translated more easily. Changes to the code are not specific to any particular market. ORW has been internationalized to support multiple languages.

This section describes configuration settings and features of the software that ensure that the base application can handle multiple languages.

## Translation

Translation is the process of interpreting and adapting text from one language into another. Although the code itself is not translated, components of the application that are translated may include the following, among others:

- Graphical user interface (GUI)
- Error messages

The user interface for ORW has been translated into:

- German
- French
- Spanish
- Japanese
- Traditional Chinese
- Simplified Chinese
- Korean
- Brazilian Portuguese
- Russian
- Italian

## Set the Client to the Applicable Locale

For a client machine to use a translation, the browser's language must be set. In Internet Explorer, choose the desired language from Tools > Internet Options...

## Adding a New Resource Bundle to Retail Workspace

To internationalize additional custom Strings for the ORW application, it is required that a new default resource properties file be created, as well as an additional properties file for each supported locale that is needed. This new properties file is a flat text file containing name=value pairs, where the name is an abstract identifier of a resource, and the value is the actual value that is displayed at run time. For example, a new properties file called `MyNewMessages.properties` could contain the following name/value pair: `browserTitle=New Browser Title`.

This default file is locale independent, and will be used as the default resource properties file. This new file should be in a directory separate from the resource bundle properties provided by the application. An example of such directory could be:

```
com.mycompany.workspace.i18n
```

Any new additional properties files should also be placed in this newly created directory.

If specific language translation is needed, then all that needs to be done is to duplicate the MyNewMessages.properties file with a new file name that has the appropriate suffix for one of the supported languages (for example, MyNewMessages\_ ja.properties for the Japanese version). You then translate the values (leaving the names of the resources the same).

To register the new resource bundle with the application, the bundle must be defined in the retail-workspace-page-config.xml configuration file. A 'new' <resource-bundle> element needs to be defined under the <resource-bundles> element (refer to the Element Definition Documentation for more information). The example below defines the new MyNewMessages bundle referenced earlier.

```
<resource-bundle var="unique_identifier"
```

```
resource-bundle="com.mycompany.workspace.i18n.MyNewMessages" />
```

Once defined, the new custom message bundle is referenced by EL expressions. The 'var' parameter specifies the EL 'prefix' for the bundle. It must be unique in this configuration file and cannot duplicate another 'var' specified in any <load-bundle> tags used elsewhere in the application

It is important to note that only the default bundle needs to be defined in the configuration file. The application automatically uses the correct bundle for other locales based on the user's browser locale setting. If the application cannot find the bundle based on the user's locale, then the default bundle is used, in this case MyNewMessages.properties.

Once the bundles are loaded, the message strings can be accessed using EL expressions.

For example: #{unique\_identifier.browserTitle}

## Deployment of New Resource Bundle(s)

The newly created resource bundle(s) must be copied into the RetailWorkspace/lang\_packs directory where the ORW application is installed (\$ORACLE\_HOME/j2ee/<instance name>/RetailWorkspace/lang\_packs/).

Choose one of the following two options for placing the messages file(s) in RetailWorkspace/lang\_packs:

1. Below the lang\_packs directory, create a directory structure that matches the package name of the resource bundle, i.e. com/mycompany/ workspace /i18n.

Copy MyNewMessages.properties and MyNewMessages\_ ja.properties to the newly created i18n directory.

2. Package the resource bundle files in a jar file, maintaining the com/mycompany/workspace/i18n directory structure within the jar file.

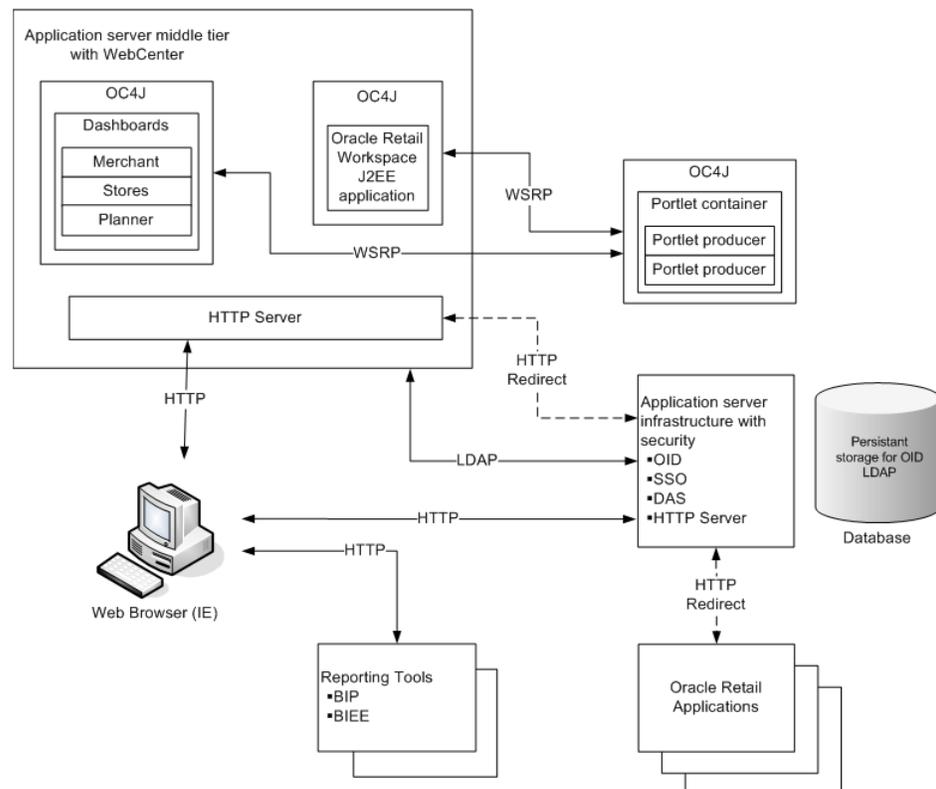
Copy this jar file to the lang\_packs directory.

## Technical Architecture

This chapter describes the overall software architecture for ORW. A high-level discussion of the general structure of the system is included. From this content, integrators can learn about the parts of the application and the interaction between the parts.

### Oracle Retail Workspace Technical Architecture Diagram and Descriptions

Figure 3-1



## Oracle Retail Workspace Architecture

ORW is a JavaServer Faces (JSF) Java Enterprise Edition (Java EE) application that provides a single point of entry to participating Oracle Retail applications. In addition, ORW provides navigation to various types of content including reports created with Oracle Business Intelligence Enterprise Edition (OBI EE) and Oracle Business Intelligence Publisher (BIP).

ORW is comprised of the following components:

- The Oracle Retail Workspace (ORW) application
- A portlet application bundle that includes three re-usable portlets
- Three sample dashboard applications

Each of these components is packaged and deployed as a separate Java EE enterprise archive (EAR).

ORW components are deployed to Oracle Containers for Java EE (OC4J). OC4J is the core Java EE runtime component of Oracle Application Server. ORW requires Oracle Application Server 10g Release 3 (10.1.3.3).

The ORW user interface, sample dashboards and portlets were all developed using Oracle JDeveloper (10.1.3.3). The user interface and sample dashboards were developed using Oracle ADF Faces JSF components. ADF Faces is a set of user interface components based on the JavaServer Faces JSR (JSR-127). In addition, ADF Faces also provides a number of JSF application framework features. ORW takes advantage of a number of these features, including:

- Partial page rendering
- Internationalization and accessibility support
- Look and feel "skinning" support

ORW also requires the Oracle WebCenter Framework component of Oracle WebCenter Suite 10g (10.1.3.3). WebCenter Suite is a suite of technologies that brings together standards-based development using JavaServer Faces with the flexibility and power of portals, to provide the ability to build context-rich applications. WebCenter Framework makes it possible to consume JSR-168 standards based portlets within a JSF application.

ORW uses Oracle Internet Directory (OID) for its user repository and Oracle Single Sign-On (OSSO). OID is an LDAP directory that takes advantage of the scalability, high availability, and security features of Oracle Database. OID and Oracle SSO are provided by Oracle Identity Management 10gR2 (10.1.2), which is included in Oracle Application Server Infrastructure 10g Release 2 (10.1.2.0.2). OID serves as the central user repository for Oracle Identity Management. It simplifies user administration in ORW and provides a standards-based application directory for the heterogeneous enterprise. Additionally, Oracle Directory Synchronization allows Oracle Identity Management to seamlessly integrate with other directories and enterprise user repositories, enabling identity information for users to be accessed wherever it resides.

ORW includes support for a Tools work list that provides links to Oracle Delegated Administration Service units. Delegated Administration Service (DAS) is a web based GUI that is used to create and manage users and groups in OID.

The ORW user interface is a highly-configurable application that allows customers to develop their own content using JDeveloper, ADF Faces and WebCenter Framework. The ORW navigation panel and content may be configured using an XML configuration file. The default ORW navigation panel includes a set of four work lists. Customers are free to delete or change the configuration of existing work lists, add

new work lists, and assign role-based "home pages". Retailers may control access to work list content by assigning to roles (OID groups).

The ORW portlet application includes a set of three re-usable JSR-168 portlets:

- URL Portlet - a simple portlet that may be used to display the contents of a web page
- Reports Portlet - a specialized version of the URL Portlet that may be used to display reports that have been developed using OBI EE or BIP, or other reporting tools that expose reports through URLs
- RSS Portlet - a portlet that may be used to display the contents of an RSS feed that conforms to RSS 2.0.

The example dashboard applications were developed using JDeveloper, ADF Faces and the WebCenter Framework, and make use of the Reports Portlet and the RSS Portlet. These dashboards provide examples of how custom content may be developed for ORW.

## Retail Workspace User Interface Framework

The ORW user interface includes a highly-configurable framework to allow for customization of content. Retailers may develop their own dashboard content using JDeveloper, ADF Faces, and the WebCenter Framework components. Retailers are free to use any of the three portlets included with ORW, or they may use any of the portlets packaged with the Oracle WebCenter Framework. Retailers may also develop their own JSR-168 portlets. They then may integrate the content into ORW by changing the ORW XML configuration file, retail-workspace-page-config.xml.

Retailers may also change the ORW configuration to add navigation links to other applications and web pages of their choice.

ORW takes advantage of ADF Faces support for "look and feel" skinning. ADF Faces "skins" are style sheets based on CSS 3.0 syntax that are specified in one place for an entire ADF Faces application. ADF Faces components are designed to use the styles as defined in the skin. The ORW user interface and dashboards are deployed with a custom ADF Faces skin. In addition to its default skin, ORW provides an example skin that may be used as the basis for creating a custom skin. Retailers are free to customize the application's look and feel by developing their own skin based on the example skin.

## Single Sign-on Overview and Topology

### What is Single Sign-On?

Single Sign-On (SSO) is a term for the ability to sign onto multiple web applications via a single user ID/Password. There are many implementations of SSO - Oracle currently provides three different implementations: Oracle Single Sign-On (OSSO), Java SSO (with the 10.1.3.1 release of OC4J) and Oracle Access Manager (provides more comprehensive user access capabilities).

Most, if not all, SSO technologies use a session cookie to hold encrypted data passed to each application. The SSO infrastructure has the responsibility to validate these cookies and, possibly, update this information. The user is directed to log on only if the cookie is not present or has become invalid. These session cookies are restricted to a single browser session and are never written to a file.

Another facet of SSO is how these technologies redirect a user's Web browser to various servlets. The SSO implementation determines when and where these redirects occur and what the final screen shown to the user is.

Most SSO implementations are performed in an application's infrastructure and not in the application logic itself. Applications that leverage infrastructure managed authentication (such as deploying specifying "Basic" or "Form" authentication) typically have little or no code changes when adapted to work in an SSO environment.

## What Do I Need for Oracle Single Sign-On?

The nexus of an Oracle Single Sign-On system is the Oracle Identity Management Infrastructure installation. This consists of the following components:

- An Oracle Internet Directory (OID) LDAP server, used to store user, role, security, and other information. OID uses an Oracle database as the back-end storage of this information.
- An Oracle Single Sign-On servlet, used to authenticate the user and create the OSSO session cookie. This servlet is deployed within the infrastructure Oracle Application Server (OAS).
- The Delegated Administration Services (DAS) application, used to administer users and group information. This information may also be loaded or modified via standard LDAP Data Interchange Format (LDIF) scripts.
- Additional administrative scripts for configuring the OSSO system and registering HTTP servers.

Additional OAS servers will be needed to deploy the business applications leveraging the OSSO technology.

## Can Oracle Single Sign-On Work with Other SSO Implementations?

Yes, OSSO has the ability to interoperate with many other SSO implementations, but some restrictions exist.

## Oracle Single Sign-on Terms and Definitions

### Authentication

Authentication is the process of establishing a user's identity. There are many types of authentication. The most common authentication process involves a user ID and password.

### Dynamically Protected URLs

A "Dynamically Protected URL" is a URL whose implementing application is aware of the OSSO environment. The application may allow a user limited access when the user has not been authenticated. Applications that implement dynamic OSSO protection typically display a "Login" link to provide user authentication and gain greater access to the application's resources.

### Identity Management Infrastructure

The Identity Management Infrastructure is the collection of product and services which provide Oracle Single Sign-on functionality. This includes the Oracle Internet Directory, an Oracle HTTP server, and the Oracle Single Sign-On services. The Oracle

Application Server deployed with these components is typically referred as the "Infrastructure" instance.

### **MOD\_OSSO**

mod\_osso is an Apache Web Server module an Oracle HTTP Server uses to function as a partner application within an Oracle Single Sign-On environment. The Oracle HTTP Server is based on the Apache HTTP Server.

### **Oracle Internet Directory**

Oracle Internet Directory (OID) is an LDAP-compliant directory service. It contains user ids, passwords, group membership, privileges, and other attributes for users who are authenticated using Oracle Single Sign-On.

### **Partner Application**

A partner application is an application that delegates authentication to the Oracle Identity Management Infrastructure. One such partner application is the Oracle HTTP Server (OHS) supplied with the Oracle Application Server. OHS uses the MOD\_OSSO module to configure this functionality.

All partner applications must be registered with the Oracle Single Sign-On server. An output product of this registration is a configuration file the partner application uses to verify a user has been previously authenticated.

### **Realm**

A Realm is a collection of users and groups (roles) managed by a single password policy. This policy controls what may be used for authentication (for example, passwords, X.509 certificates, biometric devices). A Realm also contains an authorization policy used for controlling access to applications or resources used by one or more applications.

A single OID can contain multiple Realms. This feature can consolidate security for retailers with multiple banners or to consolidate security for multiple development and test environments.

### **Statically Protected URLs**

A URL is considered to be "Statically Protected" when an Oracle HTTP server is configured to limit access to this URL to only SSO authenticated users. Any attempt to access a "Statically Protected URL" results in the display of a login page or an error page to the user.

Servlets, static HTML pages, and JSP pages may be statically protected.

## **What Single Sign-On is not**

Single Sign-On is NOT a user ID/password mapping technology. However, some applications can store and retrieve user IDs and passwords for non-SSO applications within an OID LDAP server. An example of this is the Oracle Forms Web Application framework, which maps OSSO user IDs to a database logins on a per-application basis.

## **How Oracle Single Sign-On Works**

Oracle Single Sign-On involves a couple of different components. These are:

- The Oracle Single Sign-On (OSSO) servlet, which is responsible for the back-end authentication of the user.

- The Oracle Internet Directory LDAP server, which stores user IDs, passwords, and group (role) membership.
- The Oracle HTTP Server associated with the web application, which verifies and controls browser redirection to the OSSO servlet.
- If the web application implements dynamic protection, then the web application itself is involved with the OSSO system.

### **Statically Protected URLs**

When an unauthenticated user accesses a statically protected URL, the following occurs:

1. The Oracle HTTP server recognizes the user has not been authenticated and redirects the browser to the Oracle Single Sign-On servlet.
2. The OSSO servlet determines the user must authenticate, and displays the OSSO login page.
3. The user must sign in via a valid user ID and password. If the OSSO servlet has been configured to support multiple Realms, a valid realm must also be entered. The user ID, password, and realm information is validated against the Oracle Internet Directory LDAP server.
4. The OSSO servlet creates and sends the user's browser an OSSO session cookie. This cookie is never persisted to disk and is specific only to the current browser session. This cookie contains the user's authenticated identity. It does NOT contain the user's password.
5. The OSSO servlet redirects the user back to the Oracle HTTP Server, along with OSSO specific information.
6. The Oracle HTTP Server decodes the OSSO information, stores it with the user's session, and allows the user access to the original URL.

### **Dynamically Protected URLs**

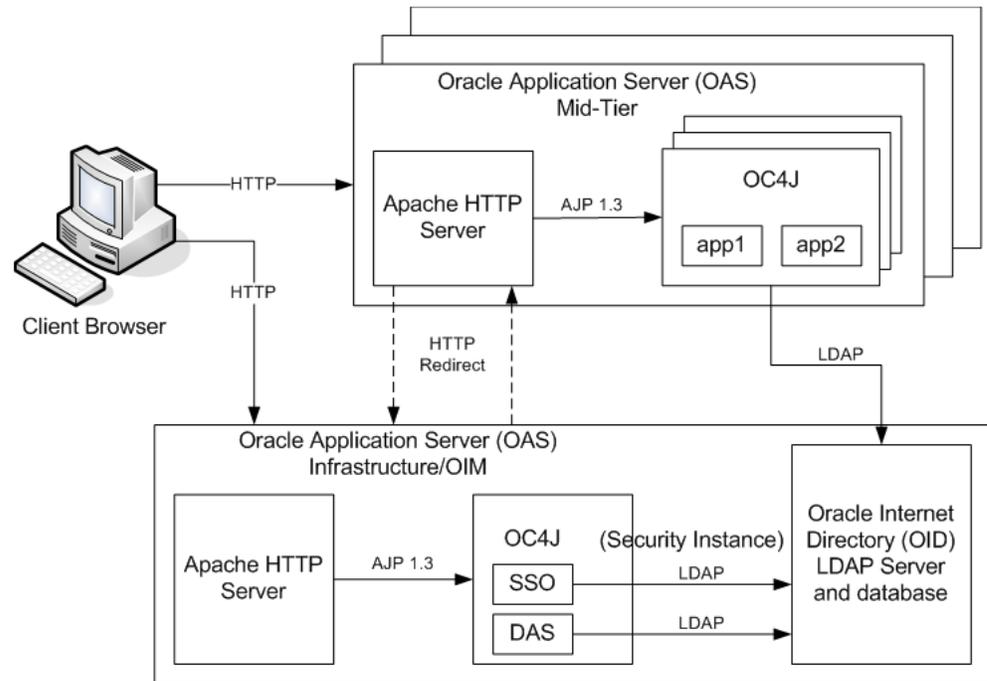
When an unauthenticated user accesses a dynamically protected URL, the following occurs:

1. The Oracle HTTP server recognizes the user has not been authenticated, but allows the user to access the URL.
2. The application determines the user must be authenticated and sends the Oracle HTTP server a specific status to begin the authentication process.
3. The Oracle HTTP Server redirects the user's browser session to the OSSO Servlet.
4. The OSSO servlet determines the user must authenticate him/herself, and so displays the OSSO login page.
5. The user must sign in via a valid user ID and password. If the OSSO servlet has been configured to support multiple realms, a valid realm must also be entered. The user ID, password, and realm information is validated against the Oracle Internet Directory LDAP server.
6. The OSSO servlet creates and sends the user's browser an OSSO session cookie. This cookie is never persisted to disk and is specific only to the current browser session. This cookie contains the user's authenticated identity. It does NOT contain the user's password.
7. The OSSO servlet redirects the user back to the Oracle HTTP Server, along with OSSO specific information.

8. The Oracle HTTP Server decodes the OSSO information, stores it with the user's session, and allows the user access to the original URL.

## Single Sign-on Topology

**Figure 3–2 Oracle Single Sign-On Architecture**



## Installation Overview

Installing Oracle Single Sign-On consists of installing the following components:

1. Installing the Oracle Internet Directory (OID) LDAP server and the Infrastructure Oracle Application Server (OAS). These are typically performed using a single session of the Oracle Universal Installer and are performed at the same time. OID requires an Oracle relational database and if one is not available, the installer will also install this as well.

The Infrastructure OAS includes the Delegated Administration Services (DAS) application as well as the OSSO servlet. The DAS application can be used for user and realm management within OID.

2. Installing additional OAS 10.1.2 mid-tier instances for the Oracle Retail applications, such as RMS, that are based on Oracle Forms technologies. These instances must be registered with the Infrastructure OAS installed in step 1).
3. Installing additional application servers to deploy other Oracle Retail applications and performing application specific initialization and deployment activities.

## Infrastructure Installation and Configuration

The Infrastructure installation for OSSO is dependent on the environment and requirements for its use. Deploying an Infrastructure OAS to be used in a test environment does not have the same availability requirements as for a production environment. Similarly, the Oracle Internet Directory (OID) LDAP server can be

deployed in a variety of different configurations. See the *Oracle Application Server Installation Guide* and the *Oracle Internet Directory Installation Guide* for more details.

### **OID User Data**

Oracle Internet Directory is an LDAP v3 compliant directory server. It provides standards-based user definitions out of the box.

The current version of Oracle Single Sign-On only supports OID as its user storage facility. Customers with existing corporate LDAP implementations may need to synchronize user information between their existing LDAP directory servers and OID. OID supports standard LDIF file formats and provides a JNDI compliant set of Java classes as well. Moreover, OID provides additional synchronization and replication facilities to integrate with other corporate LDAP implementations.

Each user ID stored in OID has a specific record containing user specific information. For role-based access, groups of users can be defined and managed within OID. Applications can thus grant access based on group (role) membership saving administration time and providing a more secure implementation.

### **OID with Multiple Realms**

OID and OSSO can be configured to support multiple user Realms. Each realm is independent from each other and contains its own set of user IDs. As such, creating a new realm is an alternative to installing multiple OID and Infrastructure instances. Hence, a single Infrastructure OAS can be used to support many development and test environments by defining one realm for each environment.

Realms may also be used to support multiple groups of external users, such as those from partner companies. For more information on Realms, see the Oracle Internet Directory Administrators Guide.

## **User Management**

User Management consists of displaying, creating, updating or removing user information. There are two basic methods of performing user management: LDIF scripts and the Delegate Administration Services (DAS) application.

### **OID DAS**

The DAS application is a web based application designed for both administrators and users. A user may update his or her own password, change his or her telephone number of record, or modify other user information. Users may search for other users based on partial strings of the user's name or ID. An administrator may create new users, unlock passwords, or delete users.

The DAS application is fully customizable. Administrators may define what user attributes are required, optional or even prompted for when a new user is created.

Furthermore, the DAS application is secure. Administrators may also define what user attributes are displayed to other users. Administration is based on , so different users may have different capabilities for user management based on their roles within their organization.

### **LDIF Scripts**

Script based user management can be used to synchronize data between multiple LDAP servers. The standard format for these scripts is the LDAP Data Interchange Format (LDIF). OID supports LDIF script for importing and exporting user information. LDIF scripts may also be used for bulk user load operations.

**User Data Synchronization**

The user store for Oracle Single Sign-On resides within the Oracle Internet Directory (OID) LDAP server. Oracle Retail applications may require additional information attached to a user name for application-specific purposes and may be stored in an application-specific database. Currently, there are no Oracle Retail tools for synchronizing changes in OID stored information with application-specific user stores. Implementers should plan appropriate time and resources for this process. Oracle Retail strongly suggests that you configure any Oracle Retail application using an LDAP for its user store to point to the same OID server used with Oracle Single Sign-On.



This chapter describes security mechanisms found in Oracle Retail Workspace (ORW).

## Overview

ORW uses two basic concepts of security.

- Authentication—ensuring a user is who the user claims to be.
- Authorization—allowing (or denying) a user specific capabilities.

ORW leverages standard J2EE application programming interfaces to verify a user has been authenticated and is authorized to access ORW resources. The authentication mechanism used is provided by the Oracle Single Sign-On subsystem. However, authorization is provided via a number of files and software.

There are multiple security mechanisms in place with ADF and the ORW implementation. The first involves standard J2EE Web application security. Standard container managed security involves the Java Authentication and Authorization Service (JAAS). Oracle's implementation of this service is known as JAZN.

For a dashboard, authentication must be provided by the Oracle Single Sign-On (OSSO) subsystem. This requires a user to enter credentials (user ID and password) only once per HTTP session. In order to leverage the OSSO subsystem, the dashboard must be configured with specific entries in its deployment descriptors.

The first deployment descriptor is the web.xml file. This is a standard J2EE file included with all web applications. There are a few requirements for this file:

- It must define the ADF Authentication servlet, including initialization parameters.
- It must define the URI of the ADF Authentication servlet.
- It must define an authentication security constraint on the ADF authentication servlet.
- It must declare all logical roles referenced by the ADF Authentication servlet.

One important but slightly confusing issue is that although the dashboard is the entity requiring an authenticated user, the security constraint is placed on the ADF Authentication servlet, not the dashboard page.

Authorization for accessing specific JSPX pages is provided by the ADF infrastructure as well. ADF provides mechanisms to control fine-grained access to JSPX files and to resources found on these files, such as database connections. When correctly configured, the ADF infrastructure will limit access without an application developer writing any security specific code.

The final source of security is supplied by the ORW framework. This software verifies that a user only sees the work lists, external links, and/or dashboards appropriate for a user.

## Single Sign-On

Oracle Single Sign-On is used to implement authentication for ORW. The Oracle HTTP Server used to front-end ORW must be registered with an instance of Oracle Single Sign-On server. All instances of ORW must also be deployed on application servers associated with an Oracle Internet Directory LDAP Server.

## Roles and Groups

Access to ORW is granted based on a user's assigned roles. A user's role assignment is stored in the Oracle Internet Directory (OID) LDAP server. If a user is assigned multiple roles, then the user will have the capabilities found in the union of all of these roles.

Roles are roughly equivalent to 'Group' membership in OID: a user will be assigned a role for every public group he/she is a member. In this document, the term role and 'group' are used interchangeably.

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**Note:** Only public groups are equated to roles. A public group has the 'Group visibility' or the 'public visibility' attribute set to 'true'.

---

---

OID groups may contain other OID groups. As such, the contained groups inherit any and all capabilities from the container group. For example, if a 'Merchandiser' role contains a 'Super Merchandiser' group, then the members of the 'Super Merchandiser' group will have all of the capabilities of the 'Merchandiser' group plus they will also have the added capabilities of the 'Super Merchandiser' group.

OID groups may also be contained in multiple groups. For example, another group, 'Supervisors', may contain the 'Super Merchandiser' group as well. In this case, the capabilities of the members of the 'Super Merchandiser' group would include all capabilities of the 'Merchandiser' group, all of the 'Supervisors' group, plus any specific to the 'Super Merchandiser' group.

A retailer may create and use site-specific roles with ORW. However, all of the site specific roles must be contained by or be members of the Retail\_Workspace\_Users role. Failure to do so will result in authentication errors when the user logs into the OSSO via ORW, unless additional modifications are made to orion-web.xml deployment descriptor.

## Permission Grants

In ORW a user is authorized to access a secured resource (work item or Dashboard) based on a 'Permission Grant'. These permission grants are stored in the OID LDAP server. The Oracle Application Server (OAS) hosting ORW retrieves these grants as needed.

Permission Grants are a little complex, but are defined with the following attributes:

1. Every Permission Grant has a type. Each type has a set of 'actions' that can be granted.

2. Every Permission Grant has a 'name' which identifies what the target of the grant is. For example, the target of a 'Work Element Permission Grant' is a secured node on a Navigation panel work list tree.
3. Every Permission Grant has one or more 'Grantees' identifying the role or other entity to whom is granted the desired capabilities. ORW grants permissions to three different types of Grantees: roles, users, and the ADF Anyone role.

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**Note:** Granting a capability to the ADF Anyone role is equivalent to making that capability available to every user, including users that have not yet authenticated themselves (logged in).

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ORW uses two types of Permission Grants: Work Element Permission Grants and ADF Region Permission Grants.

- Work Element Permission Grants control what is visible and accessible in the Navigation panel of ORW for a user. A user will only see those secured work items he/she has been granted permission to access.

Work items may have a parent/child relationship. When such a relationship exists and the parent is a secure work item, then a user must have permission to view and access both the parent and child work item in order to view and access the child work item in the Navigation panel. The Permissions Management Tool automatically recognizes and displays secure Work Element Permission Grants associated with the current retail-workspace-page-config.xml configuration file.

- ADF Region Permission Grants are used by the underlying ADF framework. Secured dashboards or secured JSP pages will require an ADF Permission grant for the 'view' action before a user can access a secured dashboard or JSP page. The Permissions Management Tool does not recognize nor seek ADF Region Permission Grants for a work item unless the <secure-work-item> element that defines the work item in retail-workspace-page-config.xml contains a <custom-attribute> tag with a name attribute of "adf-permission-target". The value of this target must be the package qualified name of the ADF page definition file associated with the work item's JSPX file.

In summary, Work Element Permission Grants allow certain users to see and access a secured work item in the Navigation pane. ADF Region Permission Grants allow certain users to execute or view the JSP or JSPX page associated with the work item.

## Managing Permission Grants via the Permissions Management Tool

ORW Permission Grants can be managed via the 'Permissions Management' administrative tool. This tool is found in the 'Tools' work list and manages permission grants for every secure work item and secure work list found in the retail-workspace-page-config.xml file. The Permission Management Tool can create or delete both Work Element and ADF Region permission grants.

---

**Note:** In order to create or delete Permission Grants, one must have the correct permissions within the Oracle Internet Directory LDAP server. Typically, this means the user ID one logs in with is a member of the JAZNAdminGroup  
(cn=JAZNAdminGroup,cn=Groups,cn=JAZNContext,cn=Products,cn=OracleContext )

---

## LDAP Access

Access to the OID LDAP is performed by the OC4J application server and by the ORW application. The OC4J container accesses the OID server for performing container managed authentication. It establishes a connection to the LDAP server based on information it finds in the OC4J application server configuration file, `$ORACLE_HOME/j2ee/<oc4j instance>/config/jazn.xml`.

ORW accesses the OID server to retrieve specific user attribute information, such as the user's given name or surname. It will also establish a connection to the OID server to read and write permission grants. The ORW application establishes a connection based on the entries in the `ldap-config.xml` configuration file.

The `ldap-config.xml` file contains the distinguished name of the ORW login. ORW uses this login to establish a connection to the OID LDAP server and extract user specific information. Then, ORW executes a proxy operation so subsequent LDAP operations use the identity (and privileges) of the user's OSSO login. This means that the ORW login may be configured with limited access privileges.

The ORW password is stored encrypted in an Oracle Wallet. The location of this wallet is found in the `ldap-config.xml` configuration file.

## Password Storage

All passwords used directly by the ORW application are stored in an encrypted form within an Oracle Wallet. These include passwords for logging into reports servers and for the ORW application to login to the OID LDAP Server.

# Integration Methods and Communication Flow

This chapter provides a functional overview of how ORW integrates with other applications, including other Oracle Retail applications.

## Overview

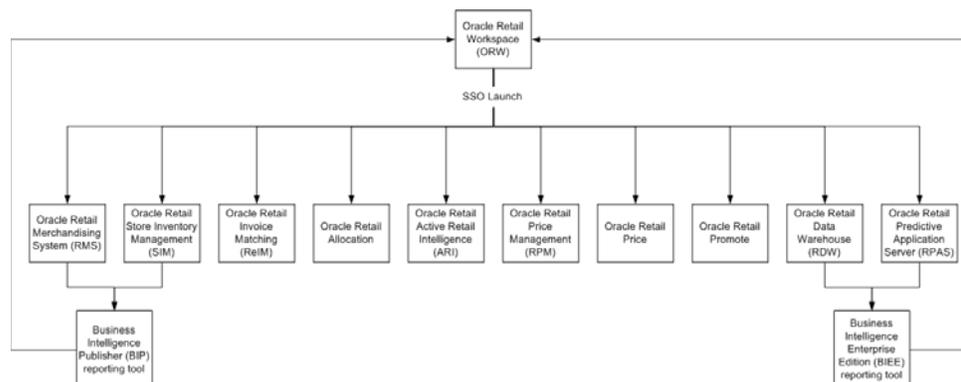
A diagram is provided illustrating the various Oracle Retail products ORW interfaces or launches.

## System to System Integration

Figure 5–1 details the overall integration among the various systems. The accompanying explanation of this diagram is written from a system-to-system perspective throughout the ORW-related portion of the enterprise. Note that this discussion focuses on a high-level functional use of data. For a technical description of the integration, see the sections later in this chapter.

## Integration Interface Diagram

Figure 5–1 Integration Diagram



## ORW and Oracle Retail Applications

ORW provides an easy to use, customizable, secure portal for launching applications and dashboards.

When launching an Oracle Retail application from ORW, the application leverages the same Oracle Internet Directory as the OSSO system. Hence, the same trusted authenticated user ID is used between ORW, OSSO, and the Oracle Retail applications.

## Reporting Tools in ORW

ORW supports two reporting tools out of the box—BI Publisher (BIP) and Oracle Business Intelligence Enterprise Edition (OBI EE).

When a user logs into ORW, each reporting tool is queried for a hierarchical list of reports that the logged in user can access. This list is then formatted and displayed in the Reports work list of the navigation pane.

BIP and OBI EE reports may also be displayed in portlets on a dashboard.

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**Note:** Due to the space constraints in portlets on a dashboard, reports displayed in these portlets may need to be resized. See the *Oracle Retail Reports Resizing Guide* which is available as Metalink Note 559554.1.

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## Oracle Retail Workspace and Single Sign-on

The SSO technology for ORW is Oracle Single Sign-On. To process the login when an unauthenticated user accesses an OSSO protected application:

1. From a web browser, the client accesses the ORW URL through their Oracle HTTP server.
  - If the URL is statically protected, the browser is immediately redirected to the OSSO servlet.
  - If the URL is dynamically protected by the application logic, the browser is redirected to the OSSO servlet based on a specific HTTP response error.

In both cases, this redirect is performed by an Oracle Apache HTTP server `mod_osso` module.

2. The OSSO Servlet displays the OSSO login page. From here, the user enters a valid user name and password to access their defined role.
3. The user's login information is passed to the OID and authenticated against the information defined in the OID. The user's defined dashboard and portlets are loaded.
4. After the user's defined dashboard and portlets are loaded, the browser session is typically redirected back to the original URL. This final redirect can be configured to be a different URL, such as a welcome page, if needed. The ORW URL displays items based on the defined role of the authenticated user.

## Interfacing with Oracle Retail Applications

In order to access your Oracle Retail applications through ORW, the `retail-workspace-page-config.xml` file must contain the URLs of your Oracle Retail applications. During installation of ORW, the installer queries for URLs to Oracle Retail applications and modifies `retail-workspace-page-config.xml`. You would

have to edit `retail-workspace-page-config.xml` if you add, move or delete applications. For additional information on setting up your application to use ORW, see the Operations Guide for the application.

## Interfacing with Reports Servers

ORW supports two reporting tools out of the box: BI Publisher (BIP) and Oracle Business Intelligence Enterprise Edition (OBI EE). The interface is optimal when those reports servers are OSSO enabled using the same Oracle Internet Directory (OID) as ORW.

There are two modes within ORW for interfacing with these reports servers: The first is exposing a hierarchical list of report hyperlinks in the Reports work list of the navigation panel. The second is showing reports within the portlets of a dashboard. These two modes are explained next.

### Exposing Reports Links in the Navigation Panel

In order to expose BIP and OBI EE reports links in the navigation panel, you must provide the necessary configuration during the ORW install. You can also respectively edit the `bip-reports-work-item` and `biee-reports-work-item` XML elements in the `retail-portal-page-config.xml` file after installation. The configuration attributes and parameters are used by ORW to query the reporting tools for all the reports to which a user has access. They are also used to put together the URLs for those reports. The names of reports are hierarchically displayed in the navigation panel as hyperlinks to those URLs. The hierarchy mimics that of the reporting tool. When a report's link is clicked, the report launches in the content area of the screen. If SSO is setup, the report is launched without prompting for the user's credentials.

For more configuration detail see Customizing Report Work Items in the Customization chapter of this guide.

Two of the configuration attributes: the webservices login ID and the webservices URL prefix deserve further explanation than the descriptions in the Customization chapter of this guide. These are explained next.

#### The Webservices Login ID

The configuration attributes `bipublisher-login-id` and `biee-login-id` are used by ORW to make secure calls to BIP and OBI EE webservices respectively. These IDs must have administrative privileges in order to access reports on behalf of the logged-in user.

For BIP the ID needs to be setup as a BIP administrator.

For OBI EE the ID needs to be setup as an OBI EE administrator or as an impersonator.

See documentation for each of the BIP and OBI EE products for information on how to set up these special users.

#### The Webservices URL Prefix

The configuration attributes `bipublisher-webservices-url` and `biee-webservices-url` are used by ORW to make the calls to BIP and OBI EE web services respectively. These web services return a list of reports the logged-in user may access.

In an OSSO environment, one may statically protect the main BIP and OBI EE URLs in the `mod_osso.conf` file found in the HTTP Server configuration directory. If so, then the webservices URL prefix must be unprotected.

**Unprotecting the BIP Webservices URL** For BIP, in a standard installation, the web.xml file located in the WEB-INF directory of that installation already contains a separate servlet mapping for services:

```
<servlet-mapping>
  <servlet-name>AxisServlet</servlet-name>
  <url-pattern>/services/*</url-pattern>
</servlet-mapping>
```

When the main URL is protected, the mod\_osso.conf file found in the HTTP Server configuration directory would have an entry as follows:

```
<Location /BIPublisher>
  require valid-user
  AuthType Basic
</Location>
```

An additional entry needs to be added to unprotect the BIP web services as follows:

```
<Location /BIPublisher/services>
  require valid-user
  AuthType Basic
  Allow from All
  Satisfy any
</Location>
```

**Unprotecting the OBI EE Webservices URL** By default, the same URL header is used within OBI EE to access all functions. When this URL is statically protected in the mod\_osso.conf file (found in the HTTP Server configuration directory), the web services are therefore also protected. An example is as follows:

```
<Location /analytics/saw.dll >
  require valid-user
  AuthType Basic
  AuthName jazn.com
</Location>
```

To unprotect the web services, a separate URL reference for the OBI EE services needs to be created as follows:

In the web.xml file located in the WEB-INF directory of the OBI EE installation, find the existing servlet mapping for the SAWBridge servlet seen below:

```
<servlet-mapping>
  <servlet-name>SAWBridge</servlet-name>
  <url-pattern>/saw.dll</url-pattern>
</servlet-mapping>
```

Then create another servlet mapping for that same servlet:

```
<servlet-mapping>
  <servlet-name>SAWBridge</servlet-name>
  <url-pattern>/services</url-pattern>
</servlet-mapping>
```

After this is done (and the OBI EE application is re-started), access the web services in a browser using the URL:

```
http://<host>:<port>/analytics/services
```

Based on the above, an example biee-webservices-url is:

```
http://<server>:<portnumber>/analytics/services.
```

An example biee-reports-url-prefix is:

```
http://<server>:<portnumber>/analytics/saw.dll
```

## Showing Reports in Dashboards

ORW dashboards may reference the general purpose Report Portlet or URL Portlet deployed with ORW. These portlets use query parameters specifying external URLs to display. Such URLs may invoke BIP or OBI EE reports. These URLs need to be carefully constructed and special characters properly escaped.

For information on how to construct BIP URLs refer to the Creating Reports and Layouts chapter of the Oracle Business Intelligence Publisher User's Guide.

For information on how to construct OBI EE URLs refer to the Integrating Oracle BI Presentation Services into Corporate Environments Using HTTP chapter of the Oracle Business Intelligence Presentation Services Administration Guide.

A simple example BIP report's URL is:

```
http://<server>:<port>/BIPublisher/Guest/RMS/12.1dev/Orders/opo_merch_dash/opo_merch_dash.xdo&_xmode=4
```

A more complex example BIP report's URL is:

```
http://<server>:<port>/BIPublisher/Guest/RMS/12.1dev/Orders/opo_merch_dash/opo_merch_dash.xdo?_xpf=&_xpt=0&_xdo=%2FGuest%2FRMS%2F12.1dev%2FOrders%2Fopo_merch_dash%2Fopo_merch_dash.xdo&_xt=OPO%20Merchant%20Dashboard%20Portal%20Report&_xf=html&_xmode=4
```

An example OBI EE report's URL is:

```
http://<server>:<port>/analytics/saw.dll?Go&Path=%2Fshared%2FPortal%2FThis%20Week%27s%20Sales%20Contribution
```

An example OBI EE dashboard's URL is:

```
http://<server>:<port>/analytics/saw.dll?PortalPages&PortalPath=%2Fshared%2FsalesTrend%2F_portal%2FsalesTrendDashboard
```

Some notable escape characters are:

- Space=%20 or +
- /=%2F
- Apostrophe=%27

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**Note:** Due to the space constraints in portlets on a dashboard, reports displayed in these portlets may need to be resized. See the *Oracle Retail Reports Resizing Guide* which is available as Metalink Note 559554.1.

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## Functional Design and Overview

This chapter provides information concerning the various aspects of ORW functional areas.

### Product Overview

ORW is a retail-specific next-generation portal providing an integrated, targeted user experience for interacting with Oracle Retail applications and data. ORW functionality provides single sign-on, central launch, role based security, dashboard creation and viewing, integration with OBI EE and BIP reports servers, user management, and client specific customization capabilities. Along with these capabilities, ORW provides default roles and dashboards for demonstration purposes.

### Single Sign-On

Single Sign-On (SSO) is the ability to access multiple applications using a single authentication to a central facility. The central SSO facility is responsible for securely authenticating the user and making this information accessible to the application. The application is then responsible for accessing the SSO authenticated user identity and behaving accordingly.

ORW is not the central SSO facility mentioned above. Like other SSO compliant applications, ORW is dependent on the central SSO facility for user authentication. Hence, the Single Sign-On capabilities of any application are independent of the presence of ORW. Users logging into the SSO system before accessing ORW will be recognized as such. The SSO technology that ORW uses is Oracle Single Sign-On.

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**Note:** ORW does not currently support user ID or password mapping when launching non-SSO applications. ORW does not store application user IDs, map any given user ID to another for any application, nor map any given password for another password.

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### Central Launch

ORW provides a central point-of-access to launch applications, reporting tools, and reports. This central launch functionality uses SSO for the Oracle Retail supported resources to pre-authenticate user security. This eliminates the need for the user to log in to each resource that is launched.

ORW also provides the ability to configure unsupported Oracle Retail applications and third-party applications for central launch. To use central launch, these type of applications must be web-based and designated by a URL. However, these resources

will not be SSO enabled and will require the user to log in upon launch of each application.

## Role Based Security

ORW provides role based security functionality by utilizing OID DAS user management. Role based security allows resource access to be granted based on a role rather than an individual user. This applies to the accessibility of applications, dashboards, and user administrative tools from ORW. However, it does not apply to user identification security within those resources. User identification security for the application occurs separately from ORW and within the application security management.

Only OID DAS administrators can manage roles and associated permissions. It is recommended that an ORW administrator be designated as an OID DAS administrator. This allows the ORW administrator to manage roles and associated permissions. Role administration includes creating new roles and role hierarchies, editing existing roles, and assigning permissions to resources.

Role based security will manifest itself by displaying the permissible resources in the ORW navigation pane. All resources that are displayed are then available to the user for launching and viewing.

All users accessing ORW should belong to the Retail\_Workspace\_User role. Retailers may define their own specific roles, and may include them as members of the Retail\_Workspace\_User role.

## Dashboard Creation and Viewing

ORW provides a development kit and detailed instructions for creating dashboards. Dashboards can contain reports, RSS feeds, HTTP links, HTML pages, any URL-based information, JSR 168 compliant portlets, and ADF components. The dashboards are viewable within ORW and role based security can be applied to them. See the Dashboard Development Tutorial chapter.

## Reports

ORW integrates with the Oracle Business Intelligence Enterprise Edition (OBI EE) and Business Intelligence Publisher (BIP) reports servers. ORW can be configured to show in the navigation panel a hierarchical list of OBI EE and BIP reports and dashboards.

## User Management

ORW provides links to OID Delegated Administrative Services. These screens are used by an administrator to manage role based security and by users to manage their profiles.

## Client Specific Customization

ORW provides the ability to customize work lists to display only relevant links and to organize them in an optimal manner. ORW also provides the ability to configure homepages, client branding, and look and feel.

## Example Roles and Dashboards

Upon installation, ORW is configured with seven predefined roles. These roles are provided as examples and for administrative purposes. The examples include four

business roles with predefined permissions to dashboards, applications, and management tools. The administrative roles are for managing roles and permissions. An **Anyone** role is part of the ADF framework and includes all users, both authenticated and unauthenticated.

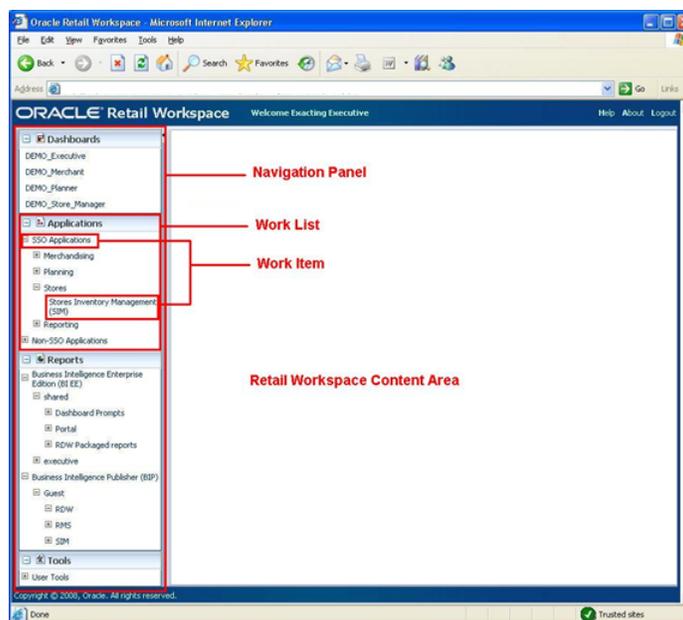
Upon installation, ORW includes four demonstration dashboards. These dashboards have predefined content that is relevant to an associated business role. The dashboard report content sources are ORW supported Oracle Retail applications. Therefore, the content of the demonstration dashboards is SSO compliant.



## Customization Guide

### Customizing Oracle Retail Workspace Navigation

The Oracle Retail Workspace (ORW) application features a navigation panel that allows the user to navigate to various types of content, including dashboards, Oracle Retail applications, Oracle Business Intelligence Enterprise Edition (OBI EE) and Business Intelligence Publisher (BIP) reports, and other types of web pages.



The navigation panel is subdivided into one or more containers called **work lists**. A work list is a collapsible container that has a title bar. A work list is used to group content of similar types. The default navigation panel has four work lists: Dashboards, Applications, Reports, and Tools.

A work list contains a hierarchy of nodes called **work items**. Each work list has zero or more work items at the root level, and work items may have zero or more child work items. Work items that have children are similar to a directory (or folder) in a file system. The work item hierarchy may go several levels deep.

Work items that have children can be expanded and collapsed. Work items that do not have child work items, in other words "leaf" work items, usually have an action associated with them. For example, when a leaf node that represents an Oracle Retail application or a web page is clicked, the ORW application launches the application or web page outside of the ORW window. Other leaf nodes, such as those that represent dashboard pages or reports, launch the content within the ORW content area.

Work lists and work items have several properties in common. For example, both may have child nodes, and in both cases the type of child nodes is a work item. Both may have display-string attributes, which define the string that is displayed in the UI for the work list or work item. Work lists and work items are sometimes collectively referred to as work elements.

The contents of the ORW navigation panel are defined in an XML configuration file. By default, the configuration file is named `retail-workspace-page-config.xml` and is installed in `<ORACLE_HOME>/j2ee/<instance name>/RetailWorkspace`, where `<ORACLE_HOME>` is the ORACLE\_HOME environment variable for the application server where ORW is installed, and `<instance name>` is the name of the OC4J instance where ORW is installed.

After installing the ORW application, you may customize the contents of the navigation panel by editing `retail-workspace-page-config.xml`. You may edit the configuration to do any of the following tasks (and more):

- Change the titles of work lists
- Change the labels displayed for work items
- Change the URLs and query string parameters for work items
- Add new work lists and work items
- Remove work lists and work items
- Hide or un-hide work lists and work items
- Reorganize a work list's hierarchy
- Specify work items as role-based home pages

The following sections describe some of the more common customization tasks. For a more complete listing of ORW configuration parameters, refer to [Chapter 2, "Backend System Administration and Configuration"](#).

## Changing the ORW Configuration File

To change `retail-workspace-page-config.xml`, you (or the person who administers or installs the ORW application) must have write access to the file and to the `<ORACLE_HOME>/j2ee/<instance name>/RetailWorkspace` directory. Changes to `retail-workspace-page-config.xml` affect all users of the ORW application.

Before you make changes to `retail-workspace-page-config.xml`, save a backup copy of its current contents. Then make a writable copy of the configuration file. If you encounter problems after making changes to the configuration, you can use the backup copy to restore the state of the configuration file.

Make changes to the copy of the configuration file as described in the various scenarios below, then save the file. After you finish making changes, copy the modified configuration file back to `<ORACLE_HOME>/j2ee/<instance name>/RetailWorkspace`, renaming to `retail-workspace-page-config.xml` if necessary. Changes take effect the next time users log in to ORW.

When configuring new values for elements in `retail-workspace-page-config.xml`, the values may include characters that you don't want the XML parser to parse (for example, `>`, `<`, `&`, `'`, and `"`). If a configuration value has characters that you want the XML parser to ignore, put your text inside a CDATA section. A CDATA section starts with `<![CDATA["` and ends with `"]>`. Everything inside the CDATA section is ignored by the parser. The ORW installer routinely encloses URL values in CDATA sections. Here is an example:

```
<parameter name="TOP_RSS_URL">
  <value><![CDATA[http://www.oracle.com/rss/rss_ocom_pr.xml]]></value>
</parameter>
```

When editing these values, edit the text between the beginning `<![CDATA["` and ending `"]>`.

## Internationalizing String Values in the Navigation Panel

The ORW configuration file supports internationalization and localization of string values. This feature allows you to customize your application in a manner that supports multiple language locales. You may define strings in a Java resource bundle, then configure a reference to the resource bundle in `retail-workspace-page-config.xml`. You then may reference properties from the resource bundle elsewhere in `retail-workspace-page-config.xml` using JSF Expression Language (EL) syntax.

Adding a reference to a custom resource bundle in `retail-workspace-page-config.xml` is as simple as locating the `<resource-bundles>` element, then adding another `<resource-bundle>` element inside this element.

### Example: Creating and configuring a resource bundle

When customizing ORW, you may wish to replace the label of an element in the navigation panel with a new internationalized string. Let's assume you need a new string, "Last Week's Sales".

You should not modify the resource bundles that are supplied with the ORW application. Instead, create a new resource bundle. For this example, the resource bundle's base name is "CustomMessages", and it is created relative to the Java package name of "com.mycompany.bundles".

1. Create a file named `CustomMessages.properties` in a `com/mycompany/bundles` directory.
2. Edit `CustomMessages.properties` and define a resource bundle string whose default value is "Last Week's Sales":

```
lastWeeksSalesTitle=Last Week's Sales
```

3. Package and deploy the new resource bundle (and any translations) to the ORW application. Refer to ["Internationalization"](#) in [Chapter 2, "Backend System Administration and Configuration"](#) for more information about packaging and deploying resource bundles.

4. Add a reference to the new resource bundle to `retail-workspace-page-config.xml`. This is done by adding a new `<resource-bundle>` element to the `<resource-bundles>` element as in this example:

```
<resource-bundle var="customMsgs"
  resource-bundle="com.mycompany.bundles.CustomMessages"/>
```

When configuring a resource-bundle element, make sure that the value of the "var" attribute is unique and does not conflict with any other JSF variable in use by the ORW application.

By adding this resource-bundle element, you are able to reference values from the resource bundle by using EL expressions. In this example, we can refer to the "Last Week's Sales" value by referencing the following EL expression:

```
#{customMsgs.lastWeeksSalesTitle}
```

Here is an example of how it might be used in retail-workspace-page-config.xml:

```
<parameter name="TOP_REPORT_TITLE">  
  <value>#{customMsgs.lastWeeksSalesTitle}</value>  
</parameter>
```

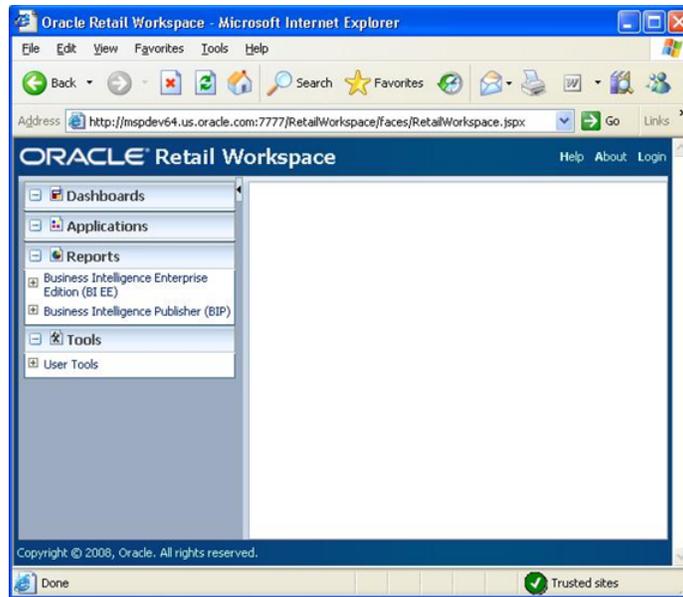
For more information about creating and deploying a custom resource bundle and internationalizing the ORW configuration, refer to ["Internationalization"](#) in [Chapter 2, "Backend System Administration and Configuration"](#).

## Securing Work Elements

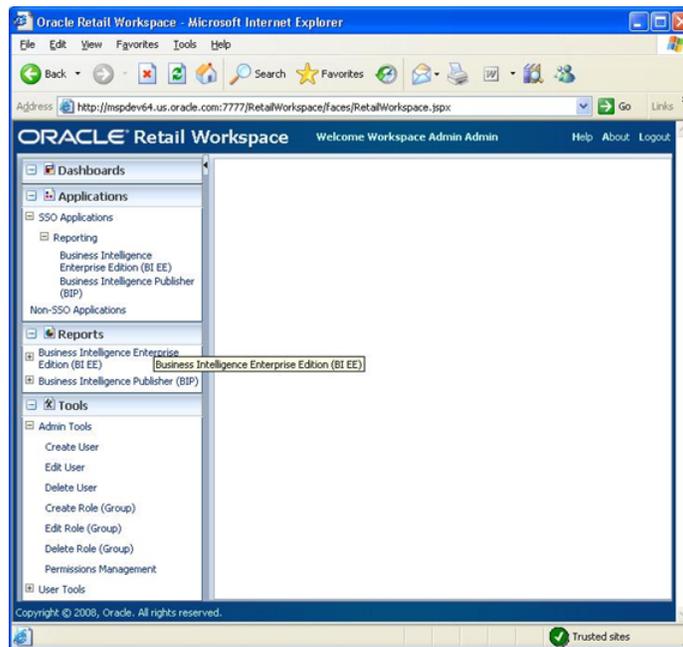
Some of the scenarios in this chapter describe how to add or change work items and work lists. When you open `retail-workspace-page-config.xml`, notice that work items are configured using the `<work-item>` element or the `<secure-work-item>` XML element. Similarly, you can configure work lists by using `<work-list>` or `<secure-work-list>` elements. You can control the visibility and access to work items and work lists by defining them as "secure". When a work item or work list is secure, only users that belong to certain security roles (OID groups) may view and access the work item or list.

A work list is "unsecure" if it has been configured using the `<work-list>` element. Unsecure work lists may be viewed by any user. All work lists in the default ORW configuration are unsecure. Therefore, each of the default work lists may be viewed by all users unless the work list's "rendered" attribute has been set to "false". It's important to note that "unsecure" work lists can and do contain "secure" work items.

The following figure shows the ORW application before the user has logged into the application. Notice that all four default work lists are visible because they are "unsecure". Notice also that only the Reports and Tools work lists have visible work items. These are unsecure work items that may be viewed and accessed by any user.



The following figure shows the same application after the "workspaceadmin" user has logged in. Notice that now reporting applications are available in the SSO Applications folder of the Applications work list, and that several administration tools are available in the Admin Tools folder of the Tools work list.



In addition to configuring a secure work item or list using the <secure-work-item> or <secure-work-list> XML elements, you must also add or alter OID for the work item or list to grant permission to access the item or list.

## Configuring for a Secure Work Element

When you add, change, or delete a secure work element, you may also need to add or delete associated with the work element. The Permissions Management tool may be used to add or delete for a secure work element.

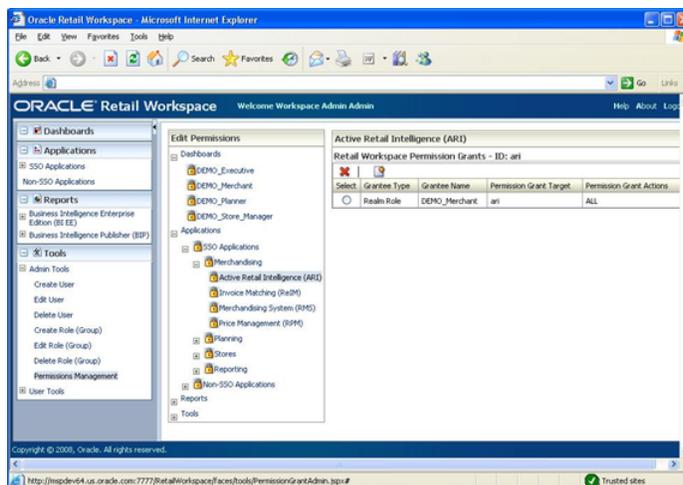
---

**Note:** The user ID must have specific privileges within OID to add new .

---

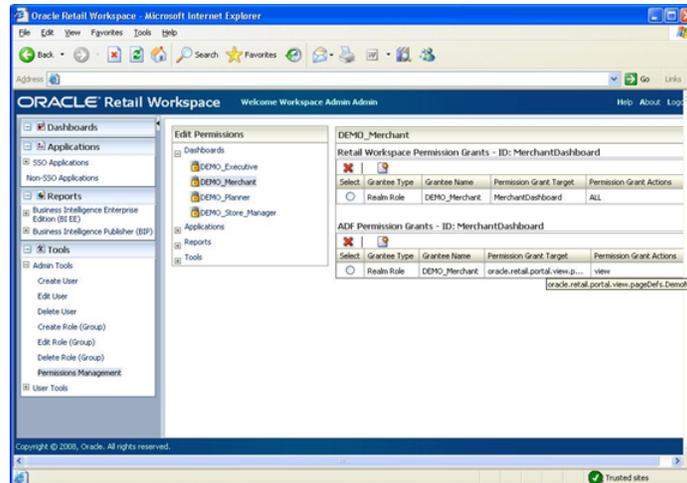
Before a user can see a <secure-work-list> or a <secure-work-item> in the navigation panel, a permission grant must be created that allows the user access. are typically made to roles (OID Groups) and not specific users. For <work-list> or <work-item> elements, no are needed to see the work element in the ORW navigation panel.

The following figure shows the Permissions Management screen. In this example, the Active Retail Intelligence (ARI) secure work item is selected. A permission grant exists for the DEMO\_Merchant role. The result is that "Active Retail Intelligence (ARI)" appears in the "SSO Applications/Merchandising" folder of the Applications work list for all users that belong to the DEMO\_Merchant role. Of course this assumes that necessary permissions have also been granted for the "SSO Applications" and "Merchandising" folders to allow the user access to those folders.



Secure dashboard pages require an additional permissions grant to allow the user to actually view the dashboard. This permission is called an ADF Region Permission. ADF Region may be configured using the "ADF " list. The target of the ADF Permission Grant is the "page def" file of the dashboard page.

The following figure shows the DEMO\_Merchant dashboard selected in the Permissions Management screen. An ORW Permission Grant exists for the DEMO\_Merchant role. The result is that "DEMO\_Merchant" appears in the Dashboards work list for all users that belong to the DEMO\_Merchant role. An ADF Permission Grant also exists for the DEMO\_Merchant role. This grant allows users that belong to the DEMO\_Merchant role to actually view the dashboard page.




---

**Note:** When you use the Permissions Management tool to change , changes may not take effect immediately. This is because of application server caching. You may have to stop and restart the application server before the new take effect.

---

For additional information about the Permissions Management tool, refer to the *Oracle Retail Workspace Administration Guide*. Refer to the Dashboard Development Tutorial chapter for more details regarding securing a dashboard work item.

## Changing Existing Content in the Navigation Panel

During ORW application installation, the ORW installer configured and deployed ORW. The installer prompted for several parameters that affect the contents and behavior of the default Dashboards, Applications, and Reports work lists, including the URLs for Oracle Retail applications, the URLs and parameters for optional ORW example dashboards, and the URLs and parameters for optional BI EE and BIP reporting tools. The following sections describe how to change navigation panel configuration settings that were made by the ORW installer.

### Changing a Work Item's URL and Query String Parameters

If the location of a dashboard, Oracle Retail application, or other content changes, you can change the work item's URL. It is also possible to change a work item's URL query string parameters.

#### Example: Changing the URL and parameters of a dashboard

The ORW application is packaged with four example dashboards. You entered the URLs to the deployed dashboard applications when installing the ORW application. You were also prompted to enter URLs to BI EE or BIP reports that the dashboards display.

In this example, we have decided to move the Demo Merchant Dashboard application to the host "prod.mycompany.com" from "dev.mycompany.com" and we now need to change the ORW configuration to point to the new location. We also have decided to change the top left report to display a custom report that shows last week's sales, and we will change the top report's title. We want the title to be internationalized.

1. Locate the work item that defines the dashboard in retail-workspace-page-config.xml. In this example, the work item is the <secure-work-item> element with "id" attribute equal to "MerchantDashboard". It looks similar to the following fragment of the XML configuration:

```
<secure-work-item id="MerchantDashboard"
    display-string="#{examplesMsgs.merchantDashboard}"
    rendered="true" launchable="true"
    show-in-content-area="true"
    target-frame="_iframe">

<url>http://dev.mycompany.com:7777/MerchantDashboard/faces/DemoMerchantDashboard.jspx</url>
    <parameters>
        <parameter name="TOP_REPORT_TITLE">
            <value>#{merchDashboardMsgs.topReportTitle}</value>
        </parameter>
        <parameter name="TOP_REPORT_URL_TO_SHOW">
<value><![CDATA[http://dev.mycompany.com:7777/analytics_
dev/saw.dll?PortalPages&PortalPath=%2Fshared%2FPortal%2F_
portal%2FResized-Top+Performers&nquser=administrator&nqpassword=rdw13]]></value
>
        </parameter>
```

(parameters intentionally omitted)

2. Change the value of the <url> element. In our example, the dashboard has been deployed to http://prod.mycompany.com:7779/MerchantDashboard/faces/DemoMerchantDashboard.jspx. To change the URL, simply replace the string between the <url> and </url> XML tags with the new URL:

```
<url>http://prod.mycompany.com:7779/MerchantDashboard/faces/DemoMerchantDashboard.jspx</url>
```

3. Change the TOP\_REPORT\_URL\_TO\_SHOW parameter to point to a new URL. In this example, the new report's URL is http://prod.mycompany.com:7777/analytics\_dev/saw.dll?MyNewReport&PortalPath=%2Fshared%2FPortal%2FLast+Week+Sales&nquser=administrator&nqpassword=rdw13.

To change the TOP\_REPORT\_URL\_TO\_SHOW parameter, locate the dashboard's <parameter> element whose name is equal to TOP\_REPORT\_URL\_TO\_SHOW. Set the value of the <value> sub-element (i.e. replace the string between the <value> and </value>) to the new URL. In this case, because the URL contains characters like "&" that we don't want parsed by the XML parser, we need to wrap the value inside a CDATA section:

```
<parameter name="TOP_REPORT_URL_TO_SHOW">
<value><![CDATA[http://prod.mycompany.com:7777/ analytics_
dev/saw.dll?MyNewReport&PortalPath=%2Fshared%2FPortal%2FLast+Week+Sales&nquser=
administrator&nqpassword=rdw13]]></value>
</parameter>
```

4. Define a resource bundle string whose default value is "Last Week's Sales". Refer to ["Internationalizing String Values in the Navigation Panel"](#) for more complete details about internationalizing strings.
5. Change the "TOP\_REPORT\_TITLE" parameter to specify the internationalized title string. To change "TOP\_REPORT\_TITLE", locate the dashboard's <parameter> element whose name is equal to "TOP\_REPORT\_TITLE". Set the value of the <value> sub-element to an EL expression that references the string that was just added to com.mycompany.bundles.CustomMessages:

```
<parameter name="TOP_REPORT_TITLE">
    <value>#{customMsgs.lastWeeksSalesTitle }</value>
</parameter>
```

### Example: Changing the URL and parameters of an Oracle Retail application

The default ORW configuration includes links to several Oracle Retail applications in the applications work list. During installation, the ORW installer prompted you to select the Oracle Retail applications you want to link to from the ORW. The installer then prompted you to enter the URL for each application that you selected.

In this example, we have decided to move the Merchandising System application (RMS) to the host "prod.mycompany.com" from "dev.mycompany.com" and we now need to change the ORW configuration to point to the new location. We also need to change the value of the "config" parameter to "rms13prodhpsso".

1. Locate the work item that defines the application in `retail-workspace-page-config.xml`. In this example, the work item is the <secure-work-item> element with an "id" attribute equal to "rms". It looks similar to the following fragment of the XML configuration:

```
<secure-work-item id="rms"
    display-string="#{confMsgs.rmsTitle}"
    rendered="true"
    launchable="true"
    show-in-content-area="false">
    <url>http://dev.mycompany.com:7780/forms/frmservlet</url>
    <parameters>
        <parameter name="config">
            <value>rms13devhpsso</value>
        </parameter>
    </parameters>
</secure-work-item>
```

2. Change the value of the <url> element. In our example, the application has been deployed to `http://prod.mycompany.com:7781/forms/frmservlet`. To change the URL, simply replace the string between the <url> and </url> XML tags with the new URL:

```
<url>http://prod.mycompany.com:7781/forms/frmservlet</url>
```

3. Change the "config" parameter. In our example, we are changing it to "rms13prodhpsso".

To change the "config" parameter, locate the work item's <parameter> element whose name is equal to "config". Set the value of the <value> sub-element (i.e. replace the string between the <value> and </value>) to the new value:

```
<parameter name="config">
    <value>rms13prodhpsso</value>
</parameter>
```

While this example is for the RMS application's "config" parameter, the same basic principals apply for configuring any parameter element. Simply locate the work item's <parameter> element by name, then change the value of the <value> sub-element.

## Changing a Work Item's Label

It is possible to change a work item's label. To change the label of any work item, you change it's "display-string" attribute.

The ORW application displays tooltips when a user hovers the mouse over a work item's label. If a work item does not have a "tooltip" attribute specified, the tooltip will default to the value of the "display-string" attribute.

### Example: Changing the label of a work item

For this example, let's assume that you have decided to change the configuration of the Demo Planner dashboard work item to point to a custom planner dashboard. You have already configured the <url> and <parameters> elements and now wish to change the work item's "DEMO\_Planner" label. You want to call it "Planner Dashboard", and you want the string to be internationalized.

1. Define the label in the resource bundle. In this example, we will just add it to a "CustomMessages.properties" that we have already created and configured in a <resource-bundle> element with "var" equal to "customMsgs". Here is the property string we will add to the resource bundle:

```
myDashboardTitle=Planner Dashboard
```

2. Change the value of the work item's "display-string" attribute. First locate the planner dashboard's work item in the configuration. Before making changes, the beginning of the element will look similar to the following fragment of XML:

```
<secure-work-item id="PlannerDashboard"
  display-string="#{examplesMsgs.plannerDashboard}"
  rendered="true" launchable="true"
  show-in-content-area="true"
  target-frame="_iframe">
  <url>http://...
```

Change the value of "display-string" to #{customMsgs.myDashboardTitle}:

```
<secure-work-item id="PlannerDashboard"
  display-string="#{customMsgs.myDashboardTitle}"
```

### Example: Changing/setting the tooltip of a work item

The default retail-workspace-page-config.xml does not define tooltips for work items. The tooltip will default to the value of the "display-string" attribute if it is not set. It is possible to configure the tooltip for a work item. For this example, let's assume that you want to specify a tooltip for the "Business Intelligence Enterprise Edition (BI EE)" work item in the Reports work list. You want to change the tooltip to "BI EE Reports" and you want the tooltip internationalized.

1. Define the tooltip in the resource bundle. In this example, you will just add it to a "CustomMessages.properties" that you have already created and configured in a <resource-bundle> element with "var" equal to "customMsgs". Here is the property string you will add to the resource bundle:

```
bieeeReportsTooltip=BI EE Reports
```

2. Add a "tooltip" attribute to the work item. First locate the work item in the configuration. Before making changes the work item will look similar to the following fragment of XML:

```
<biee-reports-work-item id="bieereports"
    display-string="#{confMsgs.bieeAppTitle}"
    rendered="true"
    launchable="false">
    ... (remainder of element
intentionally omitted)
```

The "tooltip" attribute is supported by all variants of work item elements, including:

- work-item
- secure-work-item
- biee-reports-work-item
- bip-reports-work-item

The "tooltip" attribute is also supported by all variants of work list elements.

Since "tooltip" is an attribute of the work item element, it is configured by inserting "tooltip=replace with your text value" in the work item element. In this example, just insert the tooltip attribute after the "id" attribute of the biee-reports-work-item element:

```
<biee-reports-work-item id="bieereports"
    tooltip="#{customMsgs.bieeReportsTooltip}"
    display-string="#{confMsgs.bieeAppTitle}"
    rendered="true"
    launchable="false">
```

## Changing a Work List Title

It is possible to change the title of a work list. To change the title of any work list, change its display-string attribute.

The ORW application displays tooltips when a user hovers the mouse over a work list title. If a work list does not have a tooltip attribute specified, the tooltip defaults to the value of the display-string attribute.

The steps for changing the work list display-string and tooltip attributes are similar to the steps for changing a work item display-string and tooltip.

The following fragment shows the Dashboard work list before changing the display string and adding a tooltip:

```
<work-list id="DashboardWorkList"
    display-string="#{confMsgs.dashboardsWorklist}">
```

Below is the work list after changing the title to an internationalized string and adding a tooltip:

```
<work-list id="DashboardWorkList"
    tooltip="#{customMsgs.dashboardTooltip}"
    display-string="#{customMsgs.customDashboardsWorklistTitle}">
```

## Hiding a Work List

It is possible to hide a work list globally by changing the value of the "rendered" attribute to false. A work list that is hidden is still configured in `retail-workspace-page-config.xml`, but is not visible in the navigation panel.

You also may restrict the visibility of a work list to users that belong to specific security roles. Refer to ["Changing an Unsecure Work List to a Secure Work List"](#) for information about configuring a work list to restrict access to users in a specific role or roles.

### Example: Changing the "rendered" attribute to hide a work list

In this example, let's assume that you do not want the Tools work list displayed in the navigation panel, but you do not want to remove it from the configuration.

1. Locate the Tools work list in `retail-workspace-page-config.xml`. The beginning of the work list will look similar to the following fragment of XML:

```
<work-list id="ToolsWorklist"
    display-string="#{confMsgs.toolsWorklist}">
  <icon-uri>#{confMsgs.toolsWorkListIcon}</icon-uri>
  <work-items>
    <secure-work-item id="AdminToolsFolder"
      display-string="#{confMsgs.adminToolsFolder}"
      rendered="true">
```

2. Change the value of the "rendered" attribute to "false". If the "rendered" attribute is not configured for the work list, its default value is "true". In that case simply add `rendered="false"` to the work-list element:

```
<work-list id="ToolsWorklist"
  rendered="false"
  display-string="#{confMsgs.toolsWorklist}">
  <icon-uri>#{confMsgs.toolsWorkListIcon}</icon-uri>
  <work-items>
    <secure-work-item id="AdminToolsFolder"
      display-string="#{confMsgs.adminToolsFolder}"
      rendered="true">
```

## Making a Hidden Work List Visible

A work list is hidden if the rendered attribute is set to false. It is possible to make a hidden work list visible by changing the value of the rendered attribute to true. If the work list is secure, its visibility will also be affected by that restrict access to the work list.

## Hiding a Work Item

It is possible to hide a work item globally by changing the value of the "rendered" attribute to false. You also may restrict the visibility of a work item to users that belong to specific security roles. A work item that is hidden is still configured in `retail-workspace-page-config.xml`, but is not visible in the navigation panel.

**Example: Changing the "rendered" attribute to hide a work item**

In this example, let's assume that you do not want the Metalink work item displayed in the navigation panel, but you do not want to remove it from the configuration.

1. Locate the Metalink work item in `retail-workspace-page-config.xml`. The work item will look similar to the following fragment of XML:

```
<work-item id="userMetalink"
  display-string="#{confMsgs.metalinkTitle}"
  rendered="true"
  launchable="true"
  show-in-content-area="false" >
  <url>http://metalink.oracle.com</url>
</work-item>
```

2. Change the value of the "rendered" attribute from "true" to "false":

```
<work-item id="userMetalink"
  display-string="#{confMsgs.metalinkTitle}"
  rendered="false"
  launchable="true"
  show-in-content-area="false" >
  <url>http://metalink.oracle.com</url>
</work-item>
```

**Making a Hidden Work Item Visible**

A work item is hidden if the "rendered" attribute is set to "false". It is possible to make a hidden work item visible by changing the value of the "rendered" attribute to "true". If the work item is secure, its visibility will also be affected by that restrict access to the work item.

**Changing an Insecure Work List to a Secure Work List**

You may make an insecure work list secure by using the `<secure-work-list>` element to define the work list. Once you have changed a `<work-list>` element to a `<secure-work-list>` element, you must use the Permissions Management tool to assign to the roles that are allowed to view the work list.

**Example: Changing an insecure work list to a secure work list**

In this example, you will change the Applications work list to a secure work list. By default the Applications work list is always visible. You wish to change the configuration to make the work list visible only when an ORW user has logged in. All of your ORW users are members of the OID "Retail\_Workspace\_Users" group.

1. Change the Tools work list to a `<secure-work-list>`. Locate the Tools work list in `retail-workspace-page-config.xml`. The work list begins with:

```
<work-list id="ApplicationsWorklist"
and ends with:
```

```
</work-list>
```

Simply replace `work-list` with `secure-work-list`. After making the change, the element will begin with:

```
<secure-work-list id="ApplicationsWorklist"
and will end with:
```

```
</secure-work-list>
```

After making this change the work list is secure. Since no have been configured for this work list yet, it will not be visible in the navigation panel.

2. Log in to the ORW application as a user that has permission to access the Permissions Management tool.
3. Open the Permissions Management tool.
4. Select the Applications work list node and use the Permissions Management tool to add an ORW permission grant for the Retail\_Workspace\_Users role.

## Changing an Unsecure Work Item to a Secure Work Item

You may make an unsecure work item secure by using the <secure-work-item> element to define the work item. Once you have changed a <work-item> element to a <secure-work-item> element, you must use the Permissions Management tool to assign to the roles that are allowed to access the work item.

### Example: Changing an unsecure work item to a secure work item

In this example, you will change the User Tools folder of the Tools work list to a secure work item. By default the User Tools work item is always visible. You wish to change the configuration to make the work item visible only when an ORW user has logged in. All of your ORW users are members of the OID "Retail\_Workspace\_Users" group.

1. Change the User Tools folder work item to a <secure-work-item>. Locate the User Tools folder work item in retail-workspace-page-config.xml. The work item begins with:

```
<work-item id="UserToolsFolder"
```

and ends with:

```
</work-item>
```

Simply replace work-item with secure-work-item. After making the change, the element will begin with:

```
<secure-work-item id="UserToolsFolder"
```

and will end with:

```
</secure-work-item>
```

After making this change the work item is secure. Since no have been configured yet for this work item, the folder will not be visible in the navigation panel, even after a user has logged in.

2. Log in to the ORW application as a user that has permission to access the Permissions Management tool.
3. Open the Permissions Management tool.
4. Select the User Tools folder work item and use the Permissions Management tool to add an ORW permission grant for the Retail\_Workspace\_Users role.

---



---

**Note:** The user ID must also have permission within OID to create a permission grant.

---



---

## Changing the ID of a Work Item or Work List

Each work item and work list has an "id" attribute that uniquely identifies the element. ORW uses the "id" attribute for two purposes:

- The work item ID is used when configuring the list of <home> work items. The "value" attribute of the <home> element must refer to the "id" attribute of a work item that is configured elsewhere in retail-workspace-page-config.xml.
- The "id" attribute of secure work items and secure work lists is required to be able to assign ORW .

If you are changing the ID of a work list or work item, you must make sure that you have removed all associated with the current ID. If you intend to use the Permissions Management tool to remove , you must use it before you have changed the ID in the retail-workspace-page-config.xml. After you change the ID, you must make sure that any <home> element that refers to the old ID is either removed or changed to refer to the new ID. If the work list or work item is secure, you must also add back after changing the ID.

### Example: Changing a Dashboard's ID

For this example, let's assume that you have decided to change the configuration of the Demo Planner dashboard work item to point to a custom planner dashboard with a new ID. You have already re-configured the work item without changing the ID, and have successfully tested the configuration. You now want to change the value of the "id" attribute to "MyCompanyPlannerDashboard".

1. In the ORW application, log in as a user that has permission to execute the Permissions Management tool. Navigate to the Permissions Management tool in the navigation panel and select it. Remove the "PlannerDashboard" one by one. Refer to the *Oracle Retail Workspace Administration Guide* for more information regarding the Permissions Management tool.
2. Change the value of the work item's "id" attribute to "MyCompanyPlannerDashboard". First locate the planner dashboard's work item in retail-workspace-page-config.xml. Before making changes, the beginning of the element will look similar to the following fragment of XML:

```
<secure-work-item id="PlannerDashboard" ...
```

Change the value of "id" to MyCompanyPlannerDashboard:

```
<secure-work-item id="MyCompanyPlannerDashboard" ...
```

3. Change any <home> element that references "PlannerDashboard". In this example, we want MyPlannerDashboard to serve as the home work item for the demo\_planner role, so change the "value" attribute to reference MyCompanyPlannerDashboard:

```
<homes>
  <!--
    Each 'home' refers to the ID of the work item that
    is the default 'home page' for the users in the specified
    role. If a user is in multiple roles, the first matching
    role found is used. Role names must match the names of
    configured security roles.
  -->
  <home role="demo_executive" value="ExecutiveDashboard"/>
  <home role="demo_merchant" value="MerchantDashboard"/>
  <home role="demo_planner" value="MyCompanyPlannerDashboard"/>
```

```
<home role="demo_store_manager" value="StoresDashboard"/>
</homes>
```

4. Save the changes to `retail-workspace-page-config.xml`. In the ORW application, log in as a user that has permission to execute the Permissions Management tool. In the Permissions Management tool, select the custom Planner Dashboard node, then add ORW for the DEMO\_Planner role.

## Customizing Reports Work Items

The default ORW navigation panel includes a Reports work list. The default configuration for the Reports work list has two specialized work items, one for Oracle Business Intelligence Enterprise Edition (OBI EE) and the other for Business Intelligence Publisher reports (BIP):

- The OBI EE Reports work item (configured in a `biee-reports-work-item` XML element)
- The BIP Reports work item (configured in a `bip-reports-work-item` XML element)

The Reports work items appear as folders in the Reports work list. Each of the Reports work items queries the reports server that is associated with it, and dynamically discovers the list of reports to display in the folder.



During installation, the ORW Installer prompted for various settings for OBI EE and BIP. You may change the settings in `retail-workspace-page-config.xml` after installation. OBI EE and BIP settings are defined in either URL query string parameters using the work item's `<parameter>` element, or in the `<custom-attributes>` element. Both `biee-reports-work-item` and `bip-reports-work-item` elements support custom attributes.

The following fragment of XML from `retail-workspace-page-config.xml` is an example of how a typical `biee-reports-work-item` is configured:

```
<biee-reports-work-item id="bieereports"
    display-string="#{confMsgs.bieeAppTitle}"
    rendered="true"
    launchable="false">
  <custom-attributes>
    <custom-attribute name="biee-webservices-url">
      <value>http://mycompany.com:7777/analytics/services</value>
    </custom-attribute>
    <custom-attribute name="biee-reports-url-prefix">
      <value>http://mycompany.com:7777/analytics/saw.dll</value>
    </custom-attribute>
    <custom-attribute name="biee-logon-id">
      <value>administrator</value>
    </custom-attribute>
    <custom-attribute name="biee-password-wallet-location">
      <value>/u00/webadmin/product/10.1.3_WC/OracleAS_1/
        j2ee/RetailPortal/RetailWorkspace/wallet</value>
    </custom-attribute>
    <custom-attribute name="biee-password-alias">
      <value>bieePwdAlias</value>
    </custom-attribute>
    <custom-attribute name="biee-shared-reports-folders">
      <value>shared</value>
    </custom-attribute>
    <custom-attribute name="biee-users-folder">
      <value>users</value>
    </custom-attribute>
  </custom-attributes>
  <parameters>
    <parameter name="options">
      <value>rfd</value>
    </parameter>
  </parameters>
</biee-reports-work-item>
```

The following fragment of XML from `retail-workspace-page-config.xml` is an example of how a typical `bip-reports-work-item` is configured:

```
<bip-reports-work-item id="bipreports"
    display-string="#{confMsgs.bipAppTitle}"
    rendered="true"
    launchable="false">
  <custom-attributes>
    <custom-attribute name="bipublisher-webservices-url">
      <value>http://mycompany.com:7777/xmlpserver/services</value>
    </custom-attribute>
    <custom-attribute name="bipublisher-reports-url-prefix">
      <value>http:// mycompany.com:7777/xmlpserver</value>
    </custom-attribute>
    <custom-attribute name="bipublisher-logon-id">
      <value>admin</value>
    </custom-attribute>
    <custom-attribute name="bipublisher-password-wallet-location">
      <value>/u00/webadmin/product/10.1.3_WC/OracleAS_1/
        j2ee/RetailPortal/RetailWorkspace/wallet</value>
    </custom-attribute>
    <custom-attribute name="bipublisher-password-alias">
      <value>bipPwdAlias</value>
    </custom-attribute>
  </custom-attributes>
</bip-reports-work-item>
```

```

        </custom-attribute>
        <custom-attribute name="bipublisher-shared-reports-folders">
            <value>Guest</value>
        </custom-attribute>
    </custom-attributes>
    <parameters>
        <parameter name="_xmode">
            <value>2</value>
        </parameter>
    </parameters>
</bip-reports-work-item>

```

The following is a summary of custom attributes and query string parameters that are configured in the work item element for each reporting tool. ORW uses some of these configuration values to query the reporting tools for a hierarchical list of all the reports to which a user has access. Other configuration tools values are used to construct the URLs for those reports. The names of the reports are displayed in the navigation panel as hyperlinks to those URLs. When a report's link is clicked, the report launches in the content area of the screen.

## OBI EE Work Item Configuration Options

<custom-attribute> options:

**Table 7-1**

Custom Attribute Name	Description
biee-webservices-url	<p>This is the prefix for the OBI EE Web Services URL e.g. <code>http://&lt;servername&gt;:&lt;portnumber&gt;/analytics/services</code>.</p> <p>This is used by Workspace to call the OBI EE SAWSessionService and WebCatalogService web services in order to query the list of reports the logged-in user has access to. If the OBI EE analytics URL is SSO protected, the services URL must not be protected or should be explicitly unprotected.</p> <p>For more details see the <a href="#">"Interfacing with Reports Servers"</a> section of <a href="#">Chapter 4, "Integration Methods and Communication Flow"</a>.</p>
biee-reports-url-prefix	<p>This prefix (e.g. <code>http://&lt;servername&gt;:&lt;portnumber&gt;/analytics/saw.dll</code>) is used by Workspace to compose the first (common) portion of each report's URL. The composed URL is then provided as a link in the Reports work list of Workspace's navigation panel.</p>
biee-logon-id	<p>This is an ID defined as a OBI EE administrator or impersonator. This is so it is capable of accessing the shared folders and any user folders on behalf of the logged-in user.</p>
biee-password-wallet-location (optional together with the biee-password-alias)	<p>This is the location on the server (where Workspace is installed) of the wallet containing the encrypted password of the biee-logon-id. This location is specified at Workspace install time.</p> <p>If this parameter and the alias are omitted or empty, it is assumed that the biee-logon-id has no password.</p>
biee-password-alias (optional together with the biee-password-wallet-location)	<p>This is the biee-logon-id password's alias specified at the ORW install when the wallet is created.</p> <p>If this parameter and the wallet location are omitted or empty, it is assumed that the biee-logon-id has no password.</p>

**Table 7-1 (Cont.)**

Custom Attribute Name	Description
biee-shared-reports-folders (optional)	<p>Example: Shared, Common, etc... This attribute contains a folder or folders defined in the OBI EE tool under the Shared folders. This attribute may contain multiple shared folders that are comma separated.</p> <p>This attribute may be left out or its value may be left empty. In this case no corresponding folder will show up in the Reports work list of the Workspace navigation panel.</p> <p>Example:</p> <pre>&lt;custom-attribute name="biee-shared-reports-folders"&gt;   &lt;value&gt;shared&lt;/value&gt; &lt;/custom-attribute&gt;</pre>
biee-users-folders (optional)	<p>This attribute contains the folder name where the OBI EE tool stores its users' folders. For example if this folder is called "Users" and the logged in user name is executive, this user's folders are found in /Users/executive.</p> <p>This attribute may be left out or its value may be left empty. In this case it is assumed that OBI EE stores its users' folders directly under the user's folder e.g. /executive.</p> <p>Example:</p> <pre>&lt;custom-attribute name="biee-users-folder"&gt;   &lt;value&gt;users&lt;/value&gt; &lt;/custom-attribute&gt;</pre>

<parameter> options:

**Table 7-2**

Parameter Name	Description
options	<p>This optional parameter controls links that show up at the bottom of the OBI EE reports.</p> <p>Example:</p> <pre>&lt;parameter name="options"&gt;   &lt;value&gt;rfd&lt;/value&gt; &lt;/parameter&gt;</pre> <p>The string is comprised of one or more of the following characters:</p> <p>The following list contains the legal values and their descriptions.</p> <ul style="list-style-type: none"> <li>■ r (refresh)</li> <li>■ f (print)</li> <li>■ d (download)</li> </ul>

## BI Publisher Work Item Configuration Options

<custom-attribute> options:

**Table 7-3**

Custom Attribute Name	Description
bipublisher-webservices-url	This is the prefix for the BIP Web Services URL e.g. <code>http://&lt;servername&gt;:&lt;portnumber&gt;/xmlpserver/services</code> . This is used by Workspace to call the BI Publisher ServiceGateway web service in order to query the list of reports the logged-in user has access to. If the BIP server's URL is SSO protected, the services URL must not be protected or should be explicitly unprotected. For more details, see <a href="#">Chapter 4, "Integration Methods and Communication Flow"</a> .
bipublisher-reports-url-prefix	This prefix (e.g. <code>http://&lt;servername&gt;:&lt;portnumber&gt;/xmlpserver</code> ) is used by Workspace to compose the first portion of each report's URL. The composed URL is then provided as a link in the Reports work list of Workspace's navigation panel.
bipublisher-logon-id	This is an ID that needs to be defined under the BI Publisher administrator role. This is so it is capable of accessing the shared folders and any user folders on behalf of the logged-in user.
bipublisher-password-wallet-location (optional together with the bipublisher-password-alias)	This is the location on the server (where ORW is installed) of the wallet containing the encrypted password of the bipublisher-logon-id. This location is specified at the time of ORW installation.  If this parameter and the alias are omitted or empty, it is assumed that the bipublisher-logon-id has no password.
bipublisher-password-alias (optional together with the bipublisher-password-wallet-location)	This is the bipublisher-logon-id password's alias specified at the time of ORW installation.  If this parameter and the wallet location are omitted or empty, it is assumed that the bipublisher-logon-id has no password.
bipublisher-shared-reports-folders (optional)	Example: Guest, Shared, Common, etc... This attribute contains a folder or folders defined in the BI Publisher tool under the Shared Folders. This attribute could contain multiple shared folders that are comma separated.  If access to BI Publisher is setup as Guest access, this attribute should be setup as the name of the folder defined in the BI Publisher Admin tab in the Guest Access section.  This attribute could be left out or its value could be left empty. In this case no corresponding folder will show up in the Reports work list of the Workspace navigation panel.  Example: <pre>&lt;custom-attribute name="bipublisher-shared-reports-folders"&gt;   &lt;value&gt;Guest&lt;/value&gt; &lt;/custom-attribute&gt;</pre>

<parameter> options:

**Table 7-4**

Parameter Name	Description
_xmode	<p>This optional parameter controls the header area of the BI Publisher reports.</p> <p>Example:</p> <pre>&lt;parameter name="_xmode"&gt;   &lt;value&gt;2&lt;/value&gt; &lt;/parameter&gt;</pre> <p>The following list contains the legal values and their descriptions.</p> <p>1 - Suppresses the logo area, the report parameters area and the Send button.</p> <p>2 - Suppresses the logo area keeps the report parameters area and shows the template area, the View, Export and Send buttons.</p> <p>3 - Same as 2</p> <p>4 - Suppresses all headers and just shows the report.</p>

Note that other parameters that affect the BIP reports behavior can be added. See the Oracle Business Intelligence Publisher documentation for more details.

## Adding New Content to the Navigation Panel

### Adding Work Lists to the Navigation Panel

You may add new work lists to the navigation panel. You may use either the `<work-list>` or the `<secure-work-list>` element to define your work lists. If you define a work list using `<secure-work-list>`, the work list will be secure and you must use the Permissions Management tool to assign to the work list. Only users that are members of roles that have been granted permission will be able to view the work list in the navigation panel.

Work lists are added as children of the `<work-lists>` element of the `<navigation-list>` element:

```
<navigation-list id="thenavlist">
  <work-lists>
    <work-list id="DashboardWorkList"
      display-string="#{confMsgs.dashboardWorklist}">
      <icon-uri>#{confMsgs.dashboardWorkListItemIcon}</icon-uri>
      <work-items>
        ... child work items go here ...
      </work-items>
    ... more work lists go here ...
  </work-lists>
  <homes>
    ... home work items defined here ...
  </homes>
</navigation-list>
```

Simply add or insert `<work-list>` or `<secure-work-list>` elements before or after existing work list elements.

To define a work list, specify the following work list attributes:

- `id="<unique id string>"`—make sure your ID is unique. The ID string is used when assigning `for` for secure work items.
- `display-string="<work list title>"`—used to define the work list's title. This may be an EL expression that references a tag in a resource bundle.
- `rendered="true"` (or allow to default)

You may also specify an optional icon for the work list by adding an `<icon-uri>` element inside the work list element. The value of the `<icon-uri>` element should be the path of an icon image that has been copied to the "images" directory of the deployed ORW application. For example, if you have created an image named `MyWorkListIcon.gif` and copied it to the "images" directory, you would specify the icon URI element as:

```
<icon-uri>images/MyWorkListIcon.gif</icon-uri>
```

You may specify the `<icon-uri>` element using an EL expression that references a tag in a resource bundle. In that case the value in the resource bundle should be the path to the icon image.

Refer to [Chapter 2, "Backend System Administration and Configuration"](#) for more information about work list configuration parameters.

## Changing Work List Folders

You may re-arrange the folders inside a work list. You may add new folders or consolidate multiple folders into a single folder.

You may use either the `<work-item>` or `<secure-work-item>` element to define a folder. If you define a folder using `<secure-work-item>`, you must use the Permissions Management tool to define `for` for the folder work item. Work items act as folders if they have "child" work items defined. Typically folder work items do not have launchable content associated with them.

To define a folder work item, specify the following work item attributes:

- `id="<unique id string>"`—make sure your ID is unique. The ID string is used when assigning `for` for secure work items.
- `display-string="<folder label>"` —used to define the folder's label. This may be an EL expression that references a tag in a resource bundle.
- `rendered="true"` (or allow to default)
- `launchable="false"` (or allow to default)—typically folder work items do not have launchable content.

Specify the following work item child elements:

- `child-work-items`—the work items that are contained in the folder are defined as children of the `<child-work-items>` element. The child work items may be either `<work-item>` or `<secure-work-item>` elements.

## Adding Work Items to the Navigation Panel

You may add new work items to the navigation panel. You may add work items to work lists or to "folder" work items. You may use either the `<work-item>` or the `<secure-work-item>` element to define your work items. If you define a work item using `<secure-work-item>`, the work item will be secure and you must use the Permissions Management tool to assign `to` to the work item. Only users that are

members of roles that have been granted permission will be able to view the work item in the navigation panel.

Work items are added as children of the `<work-items>` element of the `<work-list>` or `<secure-work-list>` element:

```
<work-list id="ApplicationsWorklist"
  display-string="{confMsgs.applicationsWorklist}">
  <icon-uri>#{confMsgs.appsWorkListIcon}</icon-uri>
  <work-items>
    <secure-work-item id="SSOApplicationsFolder"
      display-string="{confMsgs.ssoAppFolder}"
      rendered="true">
      ... work item child elements go here ...
    </secure-work-item>
    ... more work items go here ...
  </work-items>
</work-list>
```

Work items may also be added as children of the `<child-work-items>` element of a "folder" `<work-item>` or `<secure-work-item>`:

```
<secure-work-item id="NonSSOStoresFolder"
  display-string="{confMsgs.storesAppFolder}"
  rendered="true">
  <child-work-items>
    <secure-work-item id="centralOffice"
      display-string="{confMsgs.centralOfficeTitle}"
      rendered="true"
      launchable="true"
      show-in-content-area="false">
      <url>URL to Central Office application here</url>
      <parameters>
        <parameter name="EXAMPLE_PARAMETER">
          <value>EXAMPLE VALUE</value>
        </parameter>
      </parameters>
    </secure-work-item>
  </child-work-items>
</secure-work-item>
```

To define a work item, specify the following work item attributes:

- `id="<unique id string>"`—make sure your ID is unique. The ID string is used when assigning for secure work items.
- `display-string="<work item label>"`—used to define the work item's label. This may be an EL expression that references a tag in a resource bundle.
- `rendered="true"` (or allow to default)

The values of the following attributes depend on the type of work item you are creating:

- `launchable`—Set this attribute to "true" if the work item should be a link that launches content, either in the content area or in a new browser window.
- `show-in-content-area`—Set this attribute to "true" if the work item is launchable and the content should be displayed in the ORW content area. Set this attribute to false if the work item is launchable and the content should be launched in a new browser window.
- `target-frame`—Set this attribute if your launchable content requires you to specify a target frame. For example, the Oracle Price Management (RPM) application uses Java WebStart to launch the application. RPM requires `target-frame` to be set as "\_self" to keep a blank browser window from appearing before WebStart launches the application.

Note: Dashboards developed for the ORW application must have the `target-frame` attribute set to one of the following values:

- `target-frame="_iframe"`—This option specifies that the dashboard will be displayed in the content area in an HTML `<iframe>` tag.
- `target-frame="_launchable_iframe"`—This option is similar to "\_frame". It tells ORW to display the content within the content area in an HTML `<iframe>` tag. In addition, an "Open in New Window" hyperlink is displayed above the content. This hyperlink will launch the content in a new window.

Depending on the type of work item you are creating, you may also need to configure additional configuration parameters in the form of child XML elements:

- `<url>`—This element is required if you have specified `launchable="true"`. Use this element to specify the URL of the content to launch.
- `<parameters>`—This element is used to specify a list of query string parameters for the URL. Each parameter is configured in a `<parameter>` element:

```
<parameter name="TOP_REPORT_TITLE">  
  <value>#{storesDashboardMsgs.topReportTitle}</value>  
</parameter>
```

Refer to ["Defining URL Query String Parameters for a Work Item"](#) for more information about configuring query string parameters.

- `<custom-attributes>`—This element is used to specify a list of custom attributes for the work item. Specialized types of work items can define custom attributes that may be defined for that work item.
  - Example 1: Secure work items use the `adf-permission-target` to configure the name of an ADF "page def" file that requires an ADF Region Permission to be configured in the Permissions Management tool.
  - Example 2: OBI EE and BIP reports work items have several custom attributes that are used to customize the entries in the Reports work list. Refer to [Customizing Reports Work Items](#) for more details.

Refer to [Chapter 2, "Backend System Administration and Configuration"](#) for more information about work item configuration parameters. Refer to the *Oracle Retail Workspace Administration Guide* for more information about the Permissions Management tool.

## Defining URL Query String Parameters for a Work Item

When you configure a work item to launch content, you specify the URL to launch with the `<url>` element. Some URLs require additional query string parameters. For example:

```
http://mycompany.com:7780/MyPage?config=MyConfig&template=MyTemplate
```

You may configure the list of query string parameters that will be appended to the URL by specifying a `<parameters>` element. Each parameter is defined in a `<parameter>` element:

```
<parameters>
  <parameter name="config">
    <value>MyConfig</value>
  </parameter>
  <parameter name="template">
    <value>MyTemplate</value>
  </parameter>
</parameters>
```

ORW assembles the query string in the order that the parameters are configured, and then appends the query string to the URL. ORW performs URL encoding for the parameter values before appending the parameter value to the query string. It does not perform URL encoding for the parameter "name" attribute. ORW supports only ASCII characters for parameter names.

## Adding Work Items that Launch a URL in the Content Area

You may configure work items to launch content in the ORW content area. ORW is able to display web pages in the content area if they display correctly inside of an HTML `<iframe>` tag.

After adding the work item as specified in Adding Work Items to the Navigation Panel, configure the URL to launch using the `<url>` element. If necessary, configure URL query string parameters using the `<parameters>` element. Then make sure you have specified the following attribute values in the `<work-item>` or `<secure-work-item>` element:

- `launchable="true"`
- `show-in-content-area="true"`
- `target-frame="_iframe"` or `"_launchable_iframe"`

For secure work items, after saving your configuration changes you must log in to ORW as an administrator that has permissions to run the Permissions Management tool. Use the Permissions Management screen to assign for the work item.

## Adding Work Items that Launch a URL in a Browser Window

You may configure work items to launch content in a separate browser window. After adding the work item as specified in Adding Work Items to the Navigation Panel, configure the URL to launch using the `<url>` element. If necessary, configure URL query string parameters using the `<parameters>` element. Then make sure you have specified the following attribute values in the `<work-item>` or `<secure-work-item>` element:

- `launchable="true"`
- `show-in-content-area="false"`

- target-frame**—Configure this value only if required by the web page. This attribute specifies the "target" of the HTML Anchor <A> element that is used to render the link in the navigation panel. If no target-frame attribute is specified, the default is the "\_blank" target, which results in launching the URL in a new unnamed window.

For secure work items, after saving your configuration changes you must log in to ORW as an administrator that has permissions to run the Permissions Management tool. Use the Permissions Management screen to assign for the work item.

## Adding a Secure Dashboard to the Dashboards List

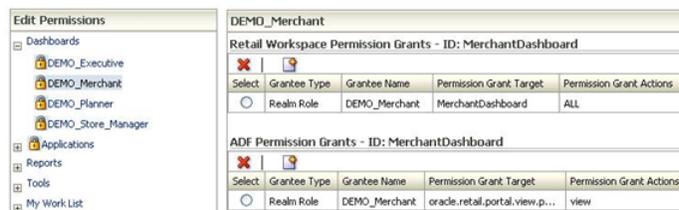
The basic steps for adding a secure dashboard are similar to the steps for adding work items that launch content in the content area (see ["Adding Work Items that Launch a URL in the Content Area"](#)). In addition you must also define a <custom-attribute> element that defines the adf-permission-target. The adf-permission-target custom attribute must specify the fully-qualified name of the ADF "page def" file associated with your secure dashboard:

```

<secure-work-item id="myDashboardUniqueId"
    display-string="#{customMsgs.myDashboardLabel}"
    rendered="true"
    launchable="true"
    show-in-content-area="true"
    target-frame="_iframe">
  <url>URL to deployed dashboard</url>
  <parameters>
    ... query string parameter elements go here ...
  </parameters>
  <custom-attributes>
    <custom-attribute name="adf-permission-target">
      <value>mydashboard.view.pageDefs.MyDashboardPageDef</value>
    </custom-attribute>
  </custom-attributes>
</secure-work-item>

```

After saving your configuration changes you must log in to ORW as an administrator that has permission to access the Permissions Management tool. Use the Permissions Management screen to assign for the work item. You must add in both the ORW and ADF lists:



Refer to [Chapter 7, "Dashboard Development Tutorial"](#) for more details regarding creating and configuring a custom dashboard.

## Removing Content from the Navigation Panel

## Removing Work Items

If a work item or any of its descendent work items are secure, you first must use the Permissions Management tool to delete ORW for the secure work item(s) you plan to delete. Once there are no ORW defined for the work item, you may remove the work item by deleting the work item element and all of its child elements from `retail-workspace-page-config.xml`.

If you remove a work item that is also configured as a home work item, you must also remove the reference to the work item from the homes list. If you fail to do so, the ORW application will be unable to parse the XML configuration file and will report an exception when a user attempts to access the application's URL.

When you remove work items that you have customized, keep in mind that you may want to also clean up any other resources you created for that work item. For example, if the work item uses internationalized strings that you defined in a custom resource bundle, you may want to remove the strings from the resource bundle. If the custom resource bundle will no longer be in use, you also may want to delete the bundle and remove any resource-bundle elements that reference the bundle from `retail-workspace-page-config.xml`.

### Example: Removing an unsecure work item

In this example, you have decided to remove the Metalink work item from the Tools work list. In the default configuration, the Metalink work item is unsecure.

1. Locate the Metalink work item in `retail-workspace-page-config.xml`. The work item will look similar to the following fragment of XML:

```
<work-item id="userMetalink"
  display-string="#{confMsgs.metalinkTitle}"
  rendered="true"
  launchable="true"
  show-in-content-area="false" >
  <url>http://metalink.oracle.com</url>
</work-item>
```

2. Remove the work item from the configuration. Delete the entire work-item element, from beginning "`<work-item`" through ending "`</work-item>`".

### Example: Removing an Oracle Retail application from the Applications work list

In this example, you have decided to remove the Merchandising System (RMS) application from the Applications worklist. Since RMS is a secure work item, before you can delete it from the configuration, you must remove defined for RMS.

1. In the ORW application, log in as a user that has permission to execute the Permissions Management tool. Navigate to the Permissions Management tool in the navigation panel and select it.
2. In the Edit Permissions panel, locate the "Merchandising System (RMS)" node. In the default configuration, the RMS node can be found by expanding Applications/SSO Applications/Merchandising. Select the RMS node.
3. Remove the RMS ORW one by one. Refer to the *Oracle Retail Workspace Administration Guide* for more information regarding the Permissions Management tool.
4. Locate the RMS work item in `retail-workspace-page-config.xml`. The work item will look similar to the following fragment of XML:

```
<secure-work-item id="rms"
```

```

        display-string="{confMsgs.rmsTitle}"
        rendered="true"
        launchable="true"
        show-in-content-area="false">
<url>http://mycompany.com:7780/forms/frmservlet</url>
<parameters>
    <parameter name="config">
        <value>rms13devhpss</value>
    </parameter>
</parameters>
</secure-work-item>

```

5. Remove the work item from the configuration. Delete the entire secure-work-item element, from beginning "<secure-work-item" through ending "</secure-work-item>".

### Example: Removing a Dashboard

In this example, you have decided to remove the Demo Executive Dashboard from the Dashboards worklist. Since the Executive Dashboard is a secure work item, before you delete it from the configuration you should remove defined for the Executive Dashboard.

In the default configuration, the Executive Dashboard is defined as a home page for the demo\_executive role. When you remove the work item from retail-workspace-page-config.xml, you also must remove the <home> element that refers to the Executive Dashboard.

1. In the ORW application, log in as a user that has permission to execute the Permissions Management tool. Navigate to the Permissions Management tool in the navigation panel and select it.
2. In the Edit Permissions panel, locate the executive dashboard node. In the default configuration, the executive dashboard node can be found by expanding the Dashboards folder. Select the executive dashboard node.
3. Remove the executive dashboard one by one. Refer to the *Oracle Retail Workspace Administration Guide* for more information regarding the Permissions Management tool.
4. Locate the executive dashboard work item in retail-workspace-page-config.xml. The work item will look similar to the following fragment of XML:

```

<secure-work-item id="ExecutiveDashboard"
    display-string="{examplesMsgs.executiveDashboard}"
    rendered="true" launchable="true"
    show-in-content-area="true">
    <url>exampleDashboards/DemoExecutiveDashboard.jsp</url>
    <parameters>
        (... several lines of XML intentionally omitted)
    </parameters>
</secure-work-item>

```

5. Remove the work item from the configuration. Delete the entire secure-work-item element, from beginning "<secure-work-item>" through ending "</secure-work-item>".
6. Locate the list of <home> work items in the retail-workspace-page-config.xml:

```

<homes>
    <!--

```

Each 'home' refers to the ID of the work item that is the default 'home page' for the users in the specified role. If a user is in multiple roles, the first matching role found is used. Role names must match the names of configured security roles.

```
-->
<home role="demo_executive" value="ExecutiveDashboard"/>
<home role="demo_merchant" value="MerchantDashboard"/>
<home role="demo_planner" value="PlannerDashboard"/>
<home role="demo_store_manager" value="StoresDashboard"/>
</homes>
```

7. Remove the home definition for the executive dashboard. Edit `retail-workspace-page-config.xml` to delete the home element whose value is a reference to the ID attribute of the dashboard. In this case the `<home>` element whose value is equal to "ExecutiveDashboard":

```
<homes>
  <!--
    Each 'home' refers to the ID of the work item that
    is the default 'home page' for the users in the specified
    role. If a user is in multiple roles, the first matching
    role found is used. Role names must match the names of
    configured security roles.
  -->
  <home role="demo_merchant" value="MerchantDashboard"/>
  <home role="demo_planner" value="PlannerDashboard"/>
  <home role="demo_store_manager" value="StoresDashboard"/>
</homes>
```

## Removing Work Lists

If a work list or any of its descendent work items are secure, you first must use the Permissions Management tool to delete ORW for the secure work item(s) and secure work list you plan to delete. Once there are no ORW defined for the work list and any of its descendent work items, you may remove the work list by deleting the work list element and all of its child elements from `retail-workspace-page-config.xml`.

When you remove work lists that you have customized, keep in mind that you may want to also clean up any other resources you created for that work list. For example, if the work list uses internationalized strings that you defined in a custom resource bundle, you may want to remove the strings from the resource bundle. If the custom resource bundle will no longer be in use, you also may want to delete the bundle and remove any resource-bundle elements that reference the bundle from `retail-workspace-page-config.xml`.

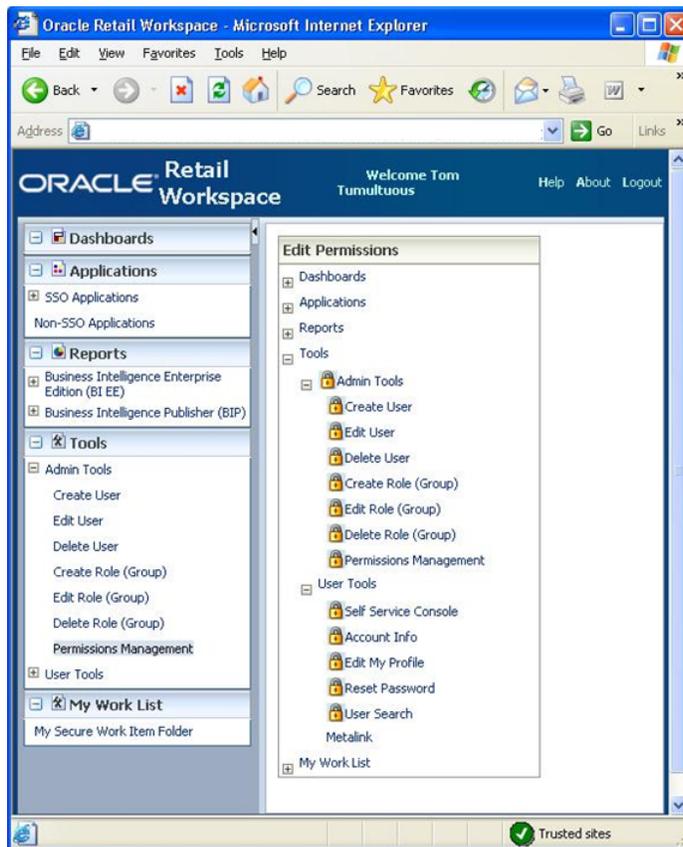
### Example: Removing an Unsecure Work List that has Secure Work Item Descendents

In this example, you have decided to remove the Tools work list. In the default configuration, the Tools work list is unsecure, and it has a mix of secure and unsecure descendent work items (the unsecure "User Tools" folders, the secure "Admin Tools" folder, and the various secure work items that are contained in those folders).

1. In the ORW application, log in as a user that has permission to execute the Permissions Management tool. Navigate to the Permissions Management tool in the navigation panel and select it.

2. In the Edit Permissions panel, locate the "Tools" work list. Expand the work list then locate the secure work items below this node. A work item is secure if it has a "lock" icon.
3. For each secure work item that is a descendent of the "Tools" node, select the work item, then use the Permission Management screens to remove the one by one. Be careful to remove only for the secure work items that descend from the "Tools" work list. In other words, do not remove for other work lists.

In the following figure, you will notice the Admin Tools and User Tools folders are expanded, and in each folder are several more secure work items. In this example, you would select each of these work items one by one and use the Permission Management screens to remove the . Refer to the *Oracle Retail Workspace Administration Guide* for more information regarding the Permissions Management tool.



4. Locate the Tools work list in retail-workspace-page-config.xml. The work list will look similar to the following fragment of XML:

```

<work-list id="ToolsWorklist"
    display-string="#{confMsgs.toolsWorklist}">
  <icon-uri>#{confMsgs.toolsWorkListIcon}</icon-uri>
  <work-items>
    <secure-work-item id="AdminToolsFolder"
      display-string="#{confMsgs.adminToolsFolder}"
      rendered="true">
      <child-work-items>
        <secure-work-item id="adminCreateUser"

```

```

        (... several lines of XML intentionally omitted)

        </child-work-items>
    </secure-work-item>
    <work-item id="UserToolsFolder"
        display-string="#{confMsgs.userToolsFolder}"
        rendered="true">
        <child-work-items>
            <secure-work-item id="userSelfService"

                (... several lines of XML intentionally omitted)

                <work-item id="userMetalink"
                    display-string="#{confMsgs.metalinkTitle}"
                    rendered="true"
                    launchable="true"
                    show-in-content-area="false" >
                    <url>http://metalink.oracle.com</url>
                </work-item>
            </child-work-items>
        </work-item>
    </work-items>
</work-list>

```

5. Remove the work list from the configuration. Delete the entire work-list element, from beginning "<work-list id="ToolsWorklist" through ending "</work-list>".

## Configuring the Workspace Home Page

You may define a list of "home" work items in `retail-workspace-page-config.xml`. A home work item is the default work item that will be displayed in the content area of ORW.

Each home work item's value is a reference to the ID of a work item that is configured elsewhere in the configuration file. Each home work item is associated with a security role (OID group). After installing ORW, the home page configuration looks similar to this:

```

<homes>
  <!--
    Each 'home' refers to the ID of the work item that
    is the default 'home page' for the users in the specified
    role. If a user is in multiple roles, the first matching
    role found is used. Role names must match the names of
    configured security roles.
  -->
  <home role="demo_executive" value="ExecutiveDashboard"/>
  <home role="demo_merchant" value="MerchantDashboard"/>
  <home role="demo_planner" value="PlannerDashboard"/>
  <home role="demo_store_manager" value="StoresDashboard"/>
</homes>

```

When the ORW application is opened, or after a user logs in or out, the application evaluates the "homes" list to determine which home work item to display in the content area.

First ORW gets a list of all security roles that the current user belongs to. Note that all users, including an un-authenticated user (one that hasn't logged in) also belong to a logical role called "anyone". For each role, ORW checks to see if there is a work item in the "homes" list whose "role" attribute matches (note: role name comparisons are case

insensitive). If a match is found, ORW then checks to make sure the user is in a role that has permission to view the work item's content. ORW also checks if the work item's "rendered" attribute is equal to "true". The first home work item that meets all of these criteria is displayed in the ORW content area. If a matching home work item is not found, the content area is empty.

## Adding a Home Work Item

To add a new home work item, insert a <home> element inside the <homes> element. The "role" attribute should match the name of a security role defined in OID. The "value" attribute must match exactly the ID of a work item that is defined elsewhere in retail-workspace-page-config.xml. If the value does not match the ID of an existing work item, the ORW application is unable to parse the XML configuration file and reports an exception when a user attempts to access the application. Make sure the specified role has been granted permission to access the work item. The Permission Management tool may be used to view and change work item permissions.

## Deleting a Home Work Item

To delete a home work item, simply remove the "home" XML element. Deleting the "home" element does not remove the actual work item that it references.

## Editing a Home Work Item

You may edit an existing home work item to change either the "role" and/or "value" attributes.

When changing the "role" attribute, the new value should match the name of a security role (group) defined in OID. The "role" attribute value is case insensitive.

When changing the "value" attribute, make sure to change it to the ID of a work item that is defined elsewhere in retail-workspace-page-config.xml.

When changing either "role" or "value", make sure the specified role has been granted permission to access the work item.

# Customizing the ORW Branding and Look and Feel

## Changing the ORW Logo and Application Name

You may customize the ORW logo and application name. The logo and application name may be configured in retail-workspace-page-config.xml.

### Changing the ORW Logo

You may change the ORW logo by installing a branding image in the "images" directory of the deployed ORW application, then adding a <branding-uri> element inside the <retail-portal-page> element. The text of the <branding-uri> element must specify the path to the logo image file.

When you change the branding image, you may also change the "branding-alt-text" attribute. The "alt" text is attached to the HTML <img> tag that is used to render the branding image. Browsers display the "alt" text when the user hovers the mouse over the image.

**Example: Changing the Branding Image and Specifying "alt" text for the Image** In this example, you have created a new image that you would like to display instead of the default Oracle logo. The image is a GIF file named "myCompanyLogo.gif". You also want to specify "alt" text for the logo.

1. Copy myCompanyLogo.gif to the "images" directory of the ORW application (\$ORACLE\_HOME/j2ee/<oc4j\_instance>/applications/RetailWorkspace/images). The URI (Uniform Resource Locator) for the image is "images/myCompanyLogo.gif".
2. Edit retail-workspace-page-config.xml. Locate the <retail-portal-page> element (at the beginning of the file). It will look similar to the following fragment of XML:

```
<retail-portal-page xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance">
```

Change the retail-portal-page element to include a branding-alt-text attribute to define the "alt" text. For this example, the "alt" text is "My Company":

```
<retail-portal-page xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
    branding-alt-text="My Company">
```

3. Insert a <branding-uri> element that specifies the path to images/myCompany.gif inside the <retail-portal-page> element:

```
<retail-portal-page xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
    branding-alt-text="My Company">
    <branding-uri>images/myCompanyLogo.gif</branding-uri>
```

## Changing the Application Name

You may customize the title of the ORW application by defining a "branding-app-text" attribute in the <retail-portal-page> element of retail-workspace-page-config.xml. The "branding-app-text" is used to configure the text that occurs to the right of the branding image in the header of the ORW page.

You may also customize the title that is displayed in the browser's title bar by defining an "application-title" attribute in the <retail-portal-page> element.

**Example: Changing the Application Name** In this example, you have decided to change the application's title from "Retail Workspace" to "My Company's Retail Workspace". You want to use this title in both the application header, and in the browser title bar.

1. Edit retail-workspace-page-config.xml. Locate the <retail-portal-page> element (at the beginning of the file). It will look similar to the following fragment of XML:

```
<retail-portal-page xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance">
```

Change the retail-portal-page element to include a branding-app-text attribute to configure the the text to display in the application header. Specify the value as "My Company's Retail Workspace":

```
<retail-portal-page xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
    branding-app-text="My Company's Retail Workspace">
```

2. Change the retail-portal-page element to include an application-title attribute to configure the text to display in the browser's title bar:

```
<retail-portal-page xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
    branding-app-text="My Company's Retail Workspace"
    application-title="My Company's Retail Workspace">
```

## Creating a New ORW Skin

ORW allows you to change the appearance or look and feel of the application without having to rewrite any of the code that implements the application's user interface, by altering the application's skin.

A skin in ADF Faces is a global style sheet that only needs to be set in one place for the application. Instead of having to style each component, or having to insert a style sheet on each page, you can create one skin for the ORW application. Every component will automatically use the styles as described by the skin. Any changes to the skin will be picked up at runtime, so no change to code is needed. Skins are based on the Cascading Style Sheet specification, and use the CSS 3.0 syntax.

While it is possible to develop skins from scratch, it is recommended to use one of the two skins provided by the ORW application as a starting point, and then make the changes to colors, fonts and images to achieve the desired appearance.

The ORW default skin and images (/skins/retailPortal) should not be modified, but rather copied to a new directory and renamed to make the necessary customizations. However, the ORW application also provides a simple skin (/skins/retailPortalSimple) which can be copied and maintained in the same directly to quickly provide a different look and feel.

The following sections explain in more detail how to customize both the simple skin and the default skin.

### Customizing the Simple Skin

This retailPortalSimple skin is intended to be a sample skin that can be copied and used to quickly and easily achieve a customized look and feel. The retailPortalSimple skin is located under /skins/retailPortalSimple. The retailPortalSimple.css file should not be modified directly. Instead, it is recommended to make a copy of the file, but keep it in the same directory location.

---

---

**Note:** The following steps for customizing the retailPortalSimple skin assume you do not need to make changes to the images used by the skin. If you intend to customize the skin images, you should follow the steps outlined in Customizing the Default Skin.

---

---

To customize the simple skin, the following steps should be followed:

1. Copy the retailPortalSimple.css and rename it within the same directory.  
For example: /skins/retailPortalSimple/myCompanySimple.css
2. Modify the myCompanySimple.css file to specify any new colors, fonts, margins, padding, etc. as necessary to achieve the new look and feel (see Style Selectors Explained below).
3. Add a < skin > entry to the ORW adf-faces-skins.xml configuration file that defines your new copy of the simple skin.

The adf-faces-skins.xml defines the custom skins to be used in the application.

When adding the skin to the adf-faces-skins.xml configuration, the < skin > entry would look like this for the myCompanySimple skin:

```
<skin>
  <id>myCompanySimple</id>
  <family>myCompanySimple</family>
```

```

<render-kit-id>oracle.adf.desktop</render-kit-id>

<style-sheet-name>skins/retailPortalSimple/myCompanySimple.css</style-sheet-name>
</skin>

```

For specific locales, the default retailPortal skin includes a separate skin for Japanese, Korean, or Chinese (zh\_TW or zh\_CN) locales. These are not provided for the retailPortalSimple skin, but they can easily be added by copying the myCompanySimple.css and adding the appropriate suffix for the supported locales (For example: myCompanySimple\_xx.css files (where "xx" is "ja", "ko", "zh\_TW" and "zh\_CN").

The font for the language specific locales can be set one time in the .AFDefaultFontFamily:alias. For example the myCompanySimple.css has the following font family:

```

.AFDefaultFontFamily:alias
{
    font-family:Tahoma, Verdana, Helvetica, sans-serif;
}

```

For Japanese, the font could be changed in the myCompanySimple\_ja.css as such:

```

.AFDefaultFontFamily:alias
{
    font-family:'MS Gothic', Verdana, Helvetica, sans-serif;
}

```

If new locale specific skins are added, they must be defined in the adf-faces-skins.xml. For example, the Japanese version would look like this:

```

<skin>
  <id>myCompanySimple_ja</id>
  <family>myCompanySimple_ja</family>
  <render-kit-id>oracle.adf.desktop</render-kit-id>
  <style-sheet-name>skins/retailPortalSimple/myCompanySimple_
ja.css</style-sheet-name>
</skin>

```

#### 4. Change the managed properties for the SkinsBean in the ORW faces-config.xml.

ORW utilizes a managed bean called SkinsBean to load the appropriate skin to use for the application (For more information on the SkinsBean, see "[SkinsBean Explained](#)"). When adding a new skin, it is required to modify the values of the <managed-property > elements for both the skinsDirectory and baseSkinName values.

Below is an example of what the < managed-property > elements would look like if the myCompanySimple skin is being used:

```

<managed-bean>
  <managed-bean-name>skins</managed-bean-name>
  <managed-bean-class>oracle.retail.common.faces.bean.SkinsBean</managed-bean-class>
  <managed-bean-scope>session</managed-bean-scope>
  <managed-property>
    <property-name>skinsDirectory</property-name>
    <property-class>java.lang.String</property-class>
    <value>skins/retailPortalSimple/</value>
  </managed-property>
  <managed-property>
    <property-name>baseSkinName</property-name>

```

```

        <property-class>java.lang.String</property-class>
        <value>myCompanySimple</value>
    </managed-property>
</managed-bean>

```

## Customizing the Default Skin

This ORW default skin (located in `/skins/retailPortal`) should not be customized directly. To make customizations to this skin, the following steps should be followed:

1. Copy all directories and files of the `/skins/retailPortal` skin to a new directory tree, as a new sub-directory under the `RetailWorkspace/skins` directory  
For example: `/skins/myCompanySkins`
2. Rename the `retailPortal.css` file  
For example: `myCompany.css`
3. Replace all of the URL's in the `myCompany.css` file that point to the `skins/retailPortal/skin_images` directory with the new directory.  
For example: `/skins/myCompanySkins/skin_images`
4. Add a `< skin >` entry to the ORW `adf-faces-skins.xml` configuration file that defines your new skin; if Japanese, Korean and/or Chinese skin CSS files are being provided, add `< skin >` entries for each additional supported language.

The `adf-faces-skins.xml` defines the custom skins to be used in the application.

When adding the skin to the `adf-faces-skins.xml` configuration, the `<skin>` entry would look like this:

```

<skin>
    <id>myCompany</id>
    <family>myCompany</family>
    <render-kit-id>oracle.adf.desktop</render-kit-id>
    <style-sheet-name>skins/myCompanySkins/myCompany.css</style-sheet-name>
</skin>

```

Locale specific skins must also be defined here. For example, the Japanese version would look like this:

```

<skin>
    <id>myCompany_ja</id>
    <family>myCompany_ja</family>
    <render-kit-id>oracle.adf.desktop</render-kit-id>
    <style-sheet-name>skins/myCompanySkins/myCompany_ja.css</style-sheet-name>
</skin>

```

5. Change the skins directory and base skin name for the `SkinsBean` in the `faces-config.xml`.

ORW utilizes a managed bean called `SkinsBean` to load the appropriate skin to use for the application (For more information on the `SkinsBean`, see "[SkinsBean Explained](#)"). When adding a new skin, it is required to modify the values of the `< managed-property >` elements for both the `skinsDirectory` and `baseSkinName` values.

Below is an example of what the `< managed-property >` elements would look like based on this approach:

```

<managed-bean>
  <managed-bean-name>skins</managed-bean-name>

  <managed-bean-class>oracle.retail.common.faces.bean.SkinsBean</managed-bean-class>
  <managed-bean-scope>session</managed-bean-scope>
  <managed-property>
    <property-name>skinsDirectory</property-name>
    <property-class>java.lang.String</property-class>
    <value>skins/myCompanySkins/</value>
  </managed-property>
  <managed-property>
    <property-name>baseSkinName</property-name>
    <property-class>java.lang.String</property-class>
    <value>myCompany</value>
  </managed-property>
</managed-bean>

```

---

**Note:** Before proceeding any further, it is recommended that you test the application at this point to ensure that nothing was missed in the conversion and configuration from retailPortal to myCompanySkins.

---

6. Modify the `myCompany.css` file to specify any new colors, fonts, margins, padding, etc. as necessary to achieve the new look and feel (see *Style Selectors Explained*). If the ORW application will be used in the Japanese, Korean, or Chinese (`zh_TW` or `zh_CN`) locales, make similar modifications to your `myCompany_xx.css` files (where "xx" is "ja", "ko", "zh\_TW" and "zh\_CN").
7. Modify or replace skin images in the `/skins/myCompanySkins/skin_images` directory, as necessary to achieve the new look.
8. Add under the `/skins` directory where ORW is deployed.

### Style Selectors Explained

Style sheet rules encompass a style selector, which identifies an element, and a set of style definitions, which describe the element's appearance. The following example illustrates a style selector from the retailPortal default skin and definition that apply to the ShowDetailFrame core customizable component.

```

af|showDetailFrame::container
{
  border-style:none ;
  background-color:white;
  border-top:1px #979991 none;
  border-bottom:1px #979991 none;
  border-left:1px #979991 none;
  border-right:1px #979991 none;
}

```

This example defines styles for the main menu container of the ShowDetailFrame component. The style definition specifies menu background color, border-style and color of the menu's surrounding borders.

Oracle ADF Faces skins use the following three types of style selectors:

- Standard selectors—These directly represent an element that can have styles applied to it. For example `af|body` represents the `af:body` component. You can set CSS styles, properties, and icons for this element.

- Selectors with pseudo elements—Denotes a specific area of a component that can have styles applied. Pseudo elements are easily recognizable by a double colon followed by the portion of the component that the selector represents.  
For example, `af|showDetailFrame::header-top-border` is the style selector for the top border of the header of a `ShowDetailFrame` component.
- Selectors that use the alias pseudo class—Used for a selector that sets styles for more than one component or more than one portion of a component.  
For example, the `.retailPortalDefaultFontSize:alias` defines the default font size for the ORW application

### SkinsBean Explained

The `SkinsBean` is an ORW managed bean that is responsible for retrieving the appropriate application skin based on locale.

The skin bean works by using the base skin name that is defined as a managed property in the `faces-config.xml` (`baseSkinName`), and appending the locale to it. It then attempts to find the `.css` file for that skin in the skins directory which is also defined as a managed property in the `faces-config.xml` (`skinsDirectory`).

If the skin cannot be found, and the locale has a country code, the bean attempts to retrieve the skin by removing the country code, and using the language code only.

If the skin resource still cannot be found, the default base skin name is used. Skins are cached in a map based on locale, so that they are read only once.

### Additional Skin Information and References

The ORW application only provides styling for those ADF Faces components that are utilized in the application. If new components are added, they need to be styled and defined in the `.css` file as well.

---

---

**Note:** Any modifications to add a custom skin need to be re-deployed each time ORW is installed. Oracle Retail recommends copying your custom skins to a backup directory before re-installing ORW to allow for re-applying the skin changes.

---

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For more information on ADF Skins, please refer to the links below:

- ADF Faces skin selector documentation  
<http://www.oracle.com/technology/products/jdev/htdocs/partners/addins/exchange/jsf/doc/skin-selectors.html>
- Defining and Applying Styles to Core Customizable Components (WebCenter skin selector documentation)  
[http://st-doc.us.oracle.com/review/AS101320/webcenter.1013/b31074/jpsdg\\_skins.htm#CIHDECJD](http://st-doc.us.oracle.com/review/AS101320/webcenter.1013/b31074/jpsdg_skins.htm#CIHDECJD)
- Developing and Using ADF Faces Skins  
[http://www.oracle.com/technology/products/jdev/101/howtos/adf\\_skins/index.html](http://www.oracle.com/technology/products/jdev/101/howtos/adf_skins/index.html)

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# Dashboard Development Tutorial

## Introduction

This tutorial teaches you how to create a dashboard and make it look and feel like the demonstration dashboards supplied with the ORW application. The lessons in this tutorial will cover the following topics:

- How to develop dashboard content for display in the ORW application.
- How to create a dashboard application in JDeveloper using JSF, ADF Faces, and Oracle WebCenter components.
- How to secure the dashboard.
- How to deploy the dashboard.
- How to configure ORW to display the dashboard.

Note that this document uses the MyDashboard application as an example.

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**Note:** The procedures in this guide do not contain steps to save your work. Be sure to save your work often by clicking the double floppy disk icon in JDeveloper.

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## Audience

This tutorial is intended for content developers and administrators who need to deploy content developed for ORW. You are expected to have some familiarity with JDeveloper, Oracle Application Development Framework (ADF), Oracle ADF Faces, and Java.

## Getting Started

This section tells you how to download the correct version of Oracle JDeveloper to complete the steps in this tutorial.

### Downloading Oracle JDeveloper 10.1.3.3 with the WebCenter Extensions

You can download Oracle JDeveloper (10.1.3.3) from the Oracle Technology Network:

<http://www.oracle.com/technology/products/jdev/index.html>

1. Select the **download** link.
2. On the Oracle JDeveloper Downloads page, select **Oracle JDeveloper 10.1.3.3**.

3. Unzip to a directory of your choice.

## Creating the Dashboard Application and Registering the Portlet Producer

In this lesson, you will learn how to create a new JDeveloper application and register a portlet producer.

### Create a New JDeveloper Application

ORW supports only Internet Explorer, version 6 and later. By default, JDeveloper launches the user's default browser, but it is possible to alter JDeveloper preferences to specify the browser.

1. In the Applications Navigator pane, select the project that includes the dashboard page.
2. Open the **Tools** menu and select the **Preferences** menu item.
3. In the Preferences dialog, select **Web Browser and Proxy**.
4. Fill in the path to the Internet Explorer application in the Browse Command Line field or select **Browse** to search for the browser executable.
5. Once the browser command line has been configured, click **OK** to save the changes.

To create the JDeveloper application:

1. Open JDeveloper by double-clicking `jdev.exe` in the directory where JDeveloper resides.
2. Select the **Applications Navigator** view tab.
3. In the Applications Navigator, highlight **Applications** and right-click.
4. Select **New Application** from the menu.
5. Fill in the details relevant to the dashboard you are developing into the wizard.
  - a. Name your application **MyDashboard**.
  - b. For the Application Template, select **WebCenter Application** from the menu.
  - c. Accept the default directory location and make a note of it.

When you choose the WebCenter Application template when creating the application, JDeveloper creates the following three projects by default in your application:

- Model
- Portlets
- ViewController

You may later find that your application does not require some of the projects, for example, if you do not create portlets or you do not employ JDeveloper features that use the Model project. The ViewController project folder is the only folder needed for the MyDashboard application. There are two different ways you can remove unnecessary projects:

- Erase a project from the disk by selecting the project in the Applications Navigator. Select **File** and then **Erase from Disk**.

- Delete the project by right-clicking the project folder and selecting **Delete**. The Delete operation only removes the project from the application navigator list. It does not delete the project from the file system.

Sometimes JDeveloper does not do a clean remove. In these cases, you need to delete these folders manually in file explorer. The only way in which to tell if the clean remove failed is to examine the directories in the file system.

## Verify Access to the Deployed Retail Workspace Portlet Producer

Before proceeding with the registration process, make sure that ORW portlets have been deployed and you have the URL of their deployment. See step 8 in "[Register Portlet Producer](#)" for URL information.

You can confirm the deployment of the portlet by entering the WSRP2 WSDL URL in a browser. When ORW was installed, the URL for the portlets WSDL should have been noted.

```
http://<host>:<port>/<context-root>
```

The following example shows the Retail Portlets WSDL.

```
<?xml version="1.0" encoding="UTF-8" ?>
- <wsdl:definitions xmlns="http://schemas.xmlsoap.org/wsdl/"
xmlns:soap="http://schemas.xmlsoap.org/wsdl/soap/"
xmlns:bind="urn:oasis:names:tc:wsrp:v2:bind"
xmlns:wsdl="http://schemas.xmlsoap.org/wsdl/"
targetNamespace="urn:oasis:names:tc:wsrp:v2:wsdl">
  <import namespace="urn:oasis:names:tc:wsrp:v2:bind" location="wsrp_v2_
bindings.wsdl" />
- <wsdl:service name="WSRP_v2_Service">
- <wsdl:port binding="bind:WSRP_v2_ServiceDescription_Binding_SOAP" name="WSRP_v2_
ServiceDescription_Service">
  <soap:address location="http://<host>:<port>/RetailPortlets/portlets/WSRP_v2_
ServiceDescription_Service" />
</wsdl:port>
- <wsdl:port binding="bind:WSRP_v2_Markup_Binding_SOAP" name="WSRP_v2_Markup_
Service">
  <soap:address
location="http://http://<host>:<port>/RetailPortlets/portlets/WSRP_v2_Markup_
Service" />
</wsdl:port>
- <wsdl:port binding="bind:WSRP_v2_Registration_Binding_SOAP" name="WSRP_v2_
Registration_Service">
  <soap:address
location="http://http://<host>:<port>/RetailPortlets/portlets/WSRP_v2_
Registration_Service" />
</wsdl:port>
- <wsdl:port binding="bind:WSRP_v2_PortletManagement_Binding_SOAP" name="WSRP_v2_
PortletManagement_Service">
  <soap:address
location="http://http://<host>:<port>/RetailPortlets/portlets/WSRP_v2_
PortletManagement_Service" />
</wsdl:port>
</wsdl:service>
</wsdl:definitions>
```

## Register Portlet Producer

ORW provides three types of portlets dashboard developers can utilize.

- URLPortlet—Used for displaying a URL link such as <http://www.oracle.com>
- ReportPortlet—Used for displaying a Report URL.
- RSSPortlet—Used for displaying the contents of a RSS Feed such as [http://www.oracle.com/technology/products/jdev/jdeveloper\\_news.xml](http://www.oracle.com/technology/products/jdev/jdeveloper_news.xml)

The process of registering a portlet producer makes these portlets available to your dashboard for consumption. JDeveloper provides options for registering Oracle proprietary PDK portlets or WSRP standard portlets. The Oracle Retail portlets are JSR 168 portlets that use the optional Oracle WSRP 2 extensions for inter-portlet communication.

Use the following procedure to register the WSRP portlet producer. Note that the producer registration requires not only that the ORW portlet producer already be deployed, but that the portlet producer is running as well.

1. In the Applications Navigator, right-click the ViewController project and select **New** from the context menu.
2. In New Gallery, filter by **All Technologies** then under Categories, expand the Web Tier node and select Portlets.
3. In New Gallery under Items, select **WSRP Producer Registration**.
4. Click **OK**.
5. If the Welcome page appears, click **Next**.
6. In the Name field, enter a name for the producer.
7. Click **Next**.
8. In the URL Endpoint field, enter the producer's URL.

Example:

`http://<host>:<port>/<context-root>/portlets/wsrp2?WSDL`

Where:

- host is the server to which your producer has been deployed.
  - port is the HTTP Listener port number.
  - context-root is the context root of the deployed ORW portlets. By default, the Retail Workspace portlet installer uses the context root of **RetailPortlets**.
  - portlets/wsrp2?WSDL is static text.
9. Accept defaults for other settings.
  10. To complete registration of the WSRP portlet producer, click **Finish**.

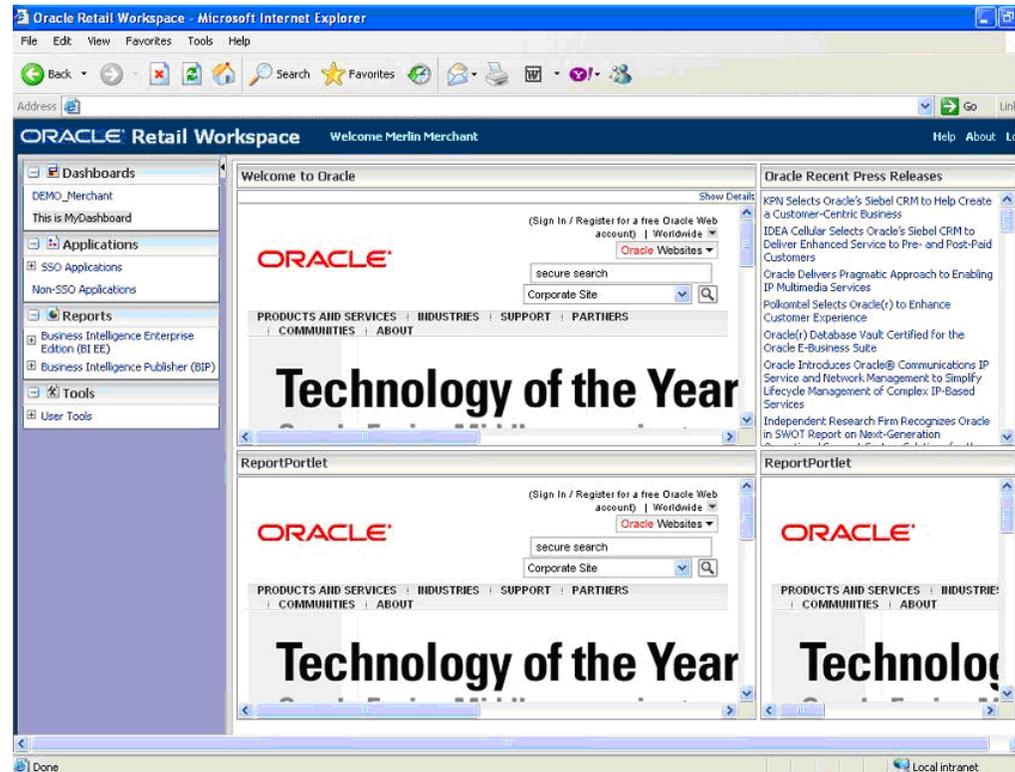
This creates a Portlet Producers folder under your dashboard application.

## Planning your Dashboard

Before developing your dashboard page, it is a good idea to visualize what your dashboard will look like. Making a screen mockup is helpful.

In following sections you will be creating a dashboard page named **MyDashboard**. This dashboard page will be developed using the ORW Report portlet and RSS portlet, and will look similar to the following example:

Figure 8–1 Oracle Retail Workspace Example



In the figure, the MyDashboard dashboard is displayed in the large content area of the ORW application. Notice that the dashboard consists of 4 separate sub-panes each with their own content. These sub-panes are portlets.

The top-left portlet, titled **Welcome to Oracle**, and the bottom two portlets are Reports portlets. The Reports portlet in a dashboard is typically used to display an OBI EE or BIP report URL. For our example, it is displaying a web page—the Oracle web site.

---

**Note:** ORW also provides a URL portlet. It is similar to the Reports portlet in that it displays a URL in an HTML <iframe>. Use the Reports portlet for displaying Oracle Business Intelligence Enterprise Edition (OBI EE) and Business Intelligence Publisher (BIP) report URLs. Use the URL portlet to display other web pages.

---

The top right portlet, titled **Oracle Recent Press Releases**, is an RSS portlet. You will use the RSS portlet in a dashboard to display the contents of an RSS feed.

## Dashboard Layout

We will lay out our dashboard with 2 rows of portlets, 2 portlets in each row. When laying out the page, we will use the WebCenter PanelCustomizable component as a container to hold the portlets. We will start with one outer PanelCustomizable component with a vertical layout. Inside the outer PanelCustomizable, we will stack two PanelCustomizable components with horizontal layouts. Inside each of these inner panels we will place two portlets.

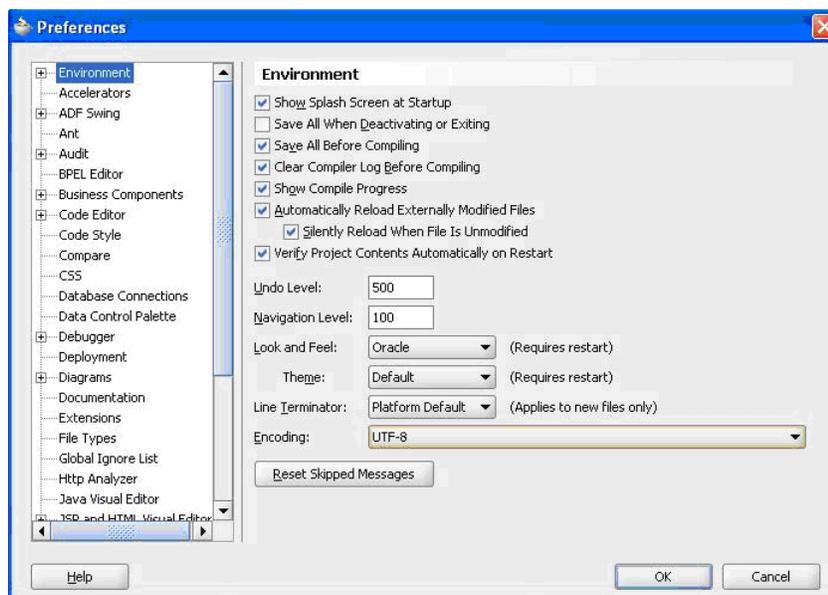
Now that we have planned our layout, we can begin developing the dashboard.

## Creating the Dashboard

In this lesson you will create the MyDashboard page.

### Create the Dashboard Page (MyDashboard.jspx)

1. The dashboard you are about to create should use UTF-8 character encoding. Before creating your dashboard page, you may wish to set the JDeveloper default for character encoding to UTF-8.
  - a. Open the **Tools** menu and select the **Preferences** menu item.
  - b. In the Preferences dialog, select **Environment**.
  - c. Open the **Encoding** menu and select **UTF-8**.
  - d. To save your preferences and close the dialog, click **Save**.



2. In the Applications Navigator, right-click the ViewController for the MyDashboard application and select **New** from the context menu.
3. In New Gallery under Categories, expand the Web Tier node and select **JSF**.
4. In New Gallery under Items, select **JSF JSP**.
5. To open the Create JSF JSP wizard, click **OK**.
6. If the Welcome page appears, click **Next**.
7. In the File Name field, enter the name for the dashboard: MyDashboard.jspx.
8. Leave the Directory Name field as the default.
9. In the Type field, select JSP Document (\*.jspx).

---

**Note:** Create WebCenter application pages as JSP documents (jspx) rather than JSP pages (jsp).

---

10. Click **Next**. On step 2, Component Binding, ensure that the **Do Not Automatically Expose UI Components in a Managed Bean** checkbox is checked.

11. Click **Next** until the Tag Libraries screen is displayed. Select **Project Technologies** in the **Filter By** box. Make sure the following libraries are moved to the Selected Libraries list:

- ADF Faces Components 10\_1\_3\_3\_0
- ADF Faces HTML 10\_1\_3\_3\_0
- ADF Portlet Components 10\_1\_3\_3\_0

This library is required when you plan to place portlets on application pages.

- Customizable Components Core 10\_1\_3\_3

This library is required when you plan to use the WebCenter Core Customizable Components, PanelCustomizable and ShowDetailFrame.

- JSF Core 1.0
- JSF HTML 1.0

12. Click **Finish**. The wizard will close. JDeveloper will then create the `MyDashboard.jspx` file and open it in an editor pane.

13. In the editor pane for `MyDashboard.jspx`, click on the **Source** tab to go to the source of the `jspx` page. On the first line, set `encoding='UTF-8'` if it is not already set.

Make sure encoding or charset is set to UTF-8 wherever specified. Note that you should not have to do this if you have already set UTF-8 as the default encoding.

Look for the following tags that may have encoding or charset values:

- `<?xml version='1.0' encoding='UTF-8'?>`
- `<jsp:directive.page contentType="text/html;charset=UTF-8"/>`
- `<meta http-equiv="Content-Type" content="text/html; charset=UTF-8"/>`

## Layout the Dashboard

You now are ready to lay out the dashboard page. You will use `PanelCustomizable` and `ObjectSpacer` components to control the layout of your page.

---



---

**Note:** ADF Faces and JSF provide several other components that can be used for controlling page layouts.

---



---

1. Add the outer `panelCustomizable` container to the page.
  - a. Right-click on the **h:form** in `MyDashboard.jspx`'s Structure pane.
  - b. In the context menu, open the **Insert inside h:form** menu, and click **Browse**.
  - c. Select **Customizable Components Core** from the menu at the top of the dialog.
  - d. Select `Panel Customizable` in the bottom window and click **OK**.
2. Select the outer `cust:panelCustomizable` in the Structure pane. In the Property Inspector for the `PanelCustomizable`, scroll to the `Layout` property and set its value to `Vertical`.
3. Nest two `panelCustomizable` containers inside the outer `panelCustomizable`. To do this, in the Structure pane right-click on the outer `cust:panelCustomizable`. Open

the "Insert inside cust:panelCustomizable" menu item, and follow the same procedure you used in step 1, navigating through the sub-menus to insert the Panel Customizable. Select the outer panelCustomizable in the Structure pane again, then repeat this procedure to create the second nested panelCustomizable.

4. Change the layout of the two inner panelCustomizable containers to horizontal. This can be done by selecting each cust:panelCustomizable in the Structure pane, then changing the value of the Layout property in the Property Inspector to horizontal. Make sure that the outer panelCustomizable's layout is vertical.
5. The look of your dashboard will be improved if there is some space between the portlets. One way to control spacing between components is to insert an ADF Faces ObjectSpacer component between them. Insert an ObjectSpacer between the inner panelCustomizable components to add some space between the two rows of portlets.
  - In the Structure pane, select the first of the two inner panelCustomizable components. Right-click to open the context menu.
  - In the context menu, mouse over **Insert after cust:panelCustomizable** to open the menu.
  - In the menu, select **ADF Faces Core**.
  - In the Insert ADF Faces Core Item dialog, select **ObjectSpacer** and click **OK**. An af:objectSpacer element will be inserted in your page after the cust:panelCustomizable.
  - In the ObjectSpacer Property Inspector, change the Width or Height as appropriate to provide spacing. Since the two inner panelCustomizable components are layed out vertically, set the Height to 4 to control the vertical space between the panels.

## Set PanelCustomizable Properties

The PanelCustomizable component has several optional attributes in addition to the Layout attribute. For example, it is possible to display a header bar at the top of the panel. It is also possible to enable an action menu that allows you to maximize and minimize the container, and so on. For this dashboard, you will only be using the PanelCustomizable as a layout container. In the following step, you will set attributes to control the behavior of the PanelCustomizable.

- Repeat this step for each cust:panelCustomizable tag:

Select the cust:panelCustomizable in the MyDashboard.jspx Structure pane. Use the Property Inspector to set the following property values:

**General Category:**

  - DisplayHeader = false
  - DisplayScrollbar = auto

**Actions Category:**

  - IsEditable = false
  - IsHelpAvailable = false
  - IsMaximizable = false
  - IsMinimizable = false
  - IsMoveable = false

- IsSeededInteractionAvailable = false
- IsShowContentEnabled = true

**Core Category:**

- Rendered = true

## Add Portlets to the Dashboard

Now that you have established the page layout, you can begin placing portlets in the individual panelCustomizables. You will add two portlets to each of the two inner PanelCustomizable components.

---



---

**Note:** When adding a portlet, make sure you are adding the portlet to one of the inner PanelCustomizable components. The outer PanelCustomizable is used merely to contain and layout the inner panels.

---



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In "[Planning your Dashboard](#)", it was determined that you will be adding 4 portlets to the dashboard. In the following steps, you will add a Reports Portlet and an RSS Portlet to the top row of the layout (the first of the two inner PanelCustomizable components). You then will add two Reports Portlets to the bottom row of the layout (the second of the two inner PanelCustomizable components).

1. In the MyDashboard.jspx Structure pane, expand the outer-most cust:panelCustomizable. Locate the first of the two inner cust:panelCustomizable components. Right click on this cust:panelCustomizable in the Structure pane. In the context menu, open **Insert inside cust:panelCustomizable** and then open the **ADF Portlet Components** menu. Another menu should open up that includes the following portlets that are included in the ORW portlet producer, which you registered in a previous section:
  - ReportPortlet
  - RSSPortlet
  - URLPortlet
2. Select **ReportPortlet**. After a little time to process the menu selection, JDeveloper will insert an adfp:portlet tag into MyDashboard.jspx. Behind the scenes, JDeveloper will also generate some required metadata files that describe the portlet you just added to the page.

---



---

**Note:** JDeveloper creates bindings and metadata for portlets when they are added to a WebCenter application page. JDeveloper associates these bindings and metadata by automatically generating IDs and portlet instance names. It is not advisable to change portlet or portlet variable names that have been generated by JDeveloper.

---



---

3. In the Property Inspector pane for the adfp:portlet that you just added, set the following properties to the following values and let other properties default:

**Actions category:**

- IsAboutModeAvailable = false
- IsConfigModeAvailable = false

- IsCustomizeModeAvailable = false
- IsDetailModeAvailable = false
- IsHelpModeAvailable = false
- IsLinkModeAvailable = false
- IsMaximizable = false
- IsMinimizable = false
- IsMovable = false
- IsNormalModeAvailable = false
- IsPersonalizeModeAvailable = false
- IsPreviewModeAvailable = false
- IsPrintModeAvailable = false
- IsSeededInteractionAvailable = false

**Core category:**

- Rendered = true

**Display Options category:**

- Background = light
- DisplayScrollbar = auto
- DisplayHeader = true
- RenderPortletInIFrame = false

4. In the Text property under the General category in the Property Inspector, enter the title of the portlet. For this example, enter "Welcome to Oracle".

---



---

**Note:** In following sections, you will learn how to internationalize the title. You will also learn how you can modify your dashboard to pass the title as a parameter to the dashboard.

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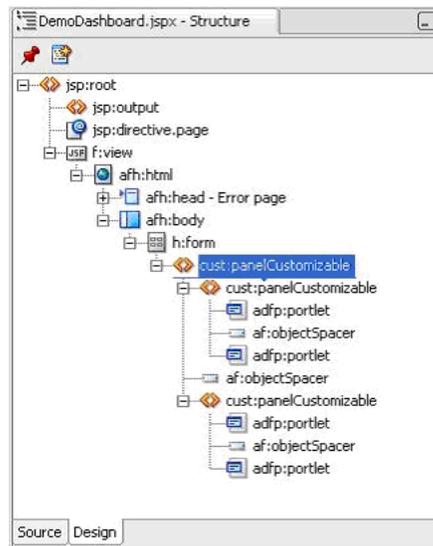
---

5. Add an RSSPortlet as the second portlet in the first row:
  - a. In the Structure pane, select the adfp:portlet you just added (the ReportPortlet).
  - b. Right click on this adfp:portlet.
  - c. In the context menu, open **Insert after adfp:portlet** and then open the **ADF Portlet Components** menu.
  - d. Select **RSSPortlet**. JDeveloper will insert another adfp:portlet tag into MyDashboard.jspx and will also generate some required metadata files that describe the RSS portlet you just added to the page.
6. Select the new RSSPortlet in the Structure pane. In the Portlet Property Inspector, set the property values recommended above in step 3. It is not necessary to set the **text** attribute of the RSSPortlet, as the portlet will get its title from the RSS feed.
7. In the Structure pane, select the first of the two portlets you just added (the ReportPortlet), and then use the appropriate JDeveloper context menus to insert an ObjectSpacer after the portlet. Since the parent container of the portlets is laid

out horizontally, change the Width property to 4 to control the horizontal spacing between the two portlets.

8. Following the procedures you have just learned, add two ReportPortlets to the bottom row of the layout, that is, to the second of the two inner panelCustomizable components. Enter any value you prefer for the **text** attribute, which sets the title of the portlet, for each portlet.

At this point, your dashboard structure pane will look similar to the following figure.




---

**Layout Note:** For more examples of how to lay out dashboards, look at the example dashboards that were packaged with ORW.

The example dashboards were created for a 1024 x 768 screen resolution.

The example dashboards use objectSpacers (an ADF faces Core Component) to space the components. The size of the spacers between components is 4. You can use af:objectSpacer to provide spacing if you want your dashboards to look similar to the ORW examples.

---

## Set Portlet Parameters

You now have a dashboard with 4 portlets. Next, you will make some changes to page metadata to configure some values required to display data in the Report and RSS portlets.

1. Right click on the jsp:page in the Application Navigation pane and click **Go to Page Definition**. The MyDashboardPageDef.xml file will open in an editor pane and the structure pane.

---

**Note:** JDeveloper generates a PageDef's file name that is the jsp:page name followed by PageDef.xml.

---

2. In the Structure pane, expand the **executables** node. Underneath executables, you will see a **variables** node, and 4 more nodes, one for each portlet you added to the page. The portlet nodes have been automatically named by JDeveloper.

3. Expand the first ReportPortlet node, and then expand its **parameters** node. The following parameters will be listed:
  - URL\_TO\_SHOW
  - PORTLET\_WIDTH
  - PORTLET\_HEIGHT
  - ALT\_URL
  - ALT\_URL\_LABEL
4. Expand the RSSPortlet node, and then expand its **parameters** node. The following parameters will be listed:
  - RSS\_URL
  - PORTLET\_WIDTH
  - PORTLET\_HEIGHT
  - SHOW\_ITEM\_DESCRIPTION
5. In the Structure pane, expand the **variables** node. The child elements of the variables node are variable elements that expose the portlet parameters for each portlet instance that you added to the page.

Since you added an RSS Portlet to the page, you will see variables for the RSSPortlet. If JDeveloper named the first RSSPortlet instance as RSSPortlet1\_1, you will see the following variables: RSSPortlet1\_1\_RSS\_URL, RSSPortlet1\_1\_PORTLET\_WIDTH, RSSPortlet1\_1\_PORTLET\_HEIGHT, and RSSPortlet1\_1\_SHOW\_ITEM\_DESCRIPTION. You will also see variables for all the ReportPortlet instances you added to the page.

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**Note:** JDeveloper automatically generates the IDs for the portlet instances, and automatically generates the variable names by concatenating the portlet parameter names to the portlet ID.

---



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6. In the Structure pane, locate the URL\_TO\_SHOW variable for the top left ReportPortlet. It will be named something like ReportPortletX\_Y\_URL\_TO\_SHOW (where "X" and "Y" are instance numbers generated by JDeveloper). Click on this node. In the property inspector for this variable, locate the DefaultValue property and enter a URL value. For our example, enter `http://www.oracle.com`. This is the URL that will be displayed in the portlet. In an ORW production dashboard, you will be setting this to the URL of a BI EE or BIP report.
7. Select the PORTLET\_WIDTH variable for the top left ReportPortlet. In the property inspector, set the DefaultValue property to 500. Select the PORTLET\_HEIGHT variable for this portlet and set the DefaultValue to 230 in the property inspector.
8. Repeat the 2 previous steps for the bottom left ReportPortlet.

---



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**Note:** If you wish, you can experiment and specify a URL for a different Web page. The page must be one that is able to render correctly within an HTML `<iframe>`.

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9. Repeat the same 2 steps for the bottom right ReportPortlet, except set the width to 300. You now have configured parameters for your 3 ReportPortlets.
10. In the Structure pane, locate the RSS\_URL variable for the RSSPortlet. It will be named something like RSSPortletX\_Y\_RSS\_URL (where "X" and "Y" are instance numbers generated by JDeveloper). Click on this node. In the property inspector for this variable, locate the DefaultValue property and enter a URL for an RSS feed. For our example, enter `http://www.oracle.com/rss/rss_ocom_pr.xml`. This is the RSS feed that will be displayed in the portlet.

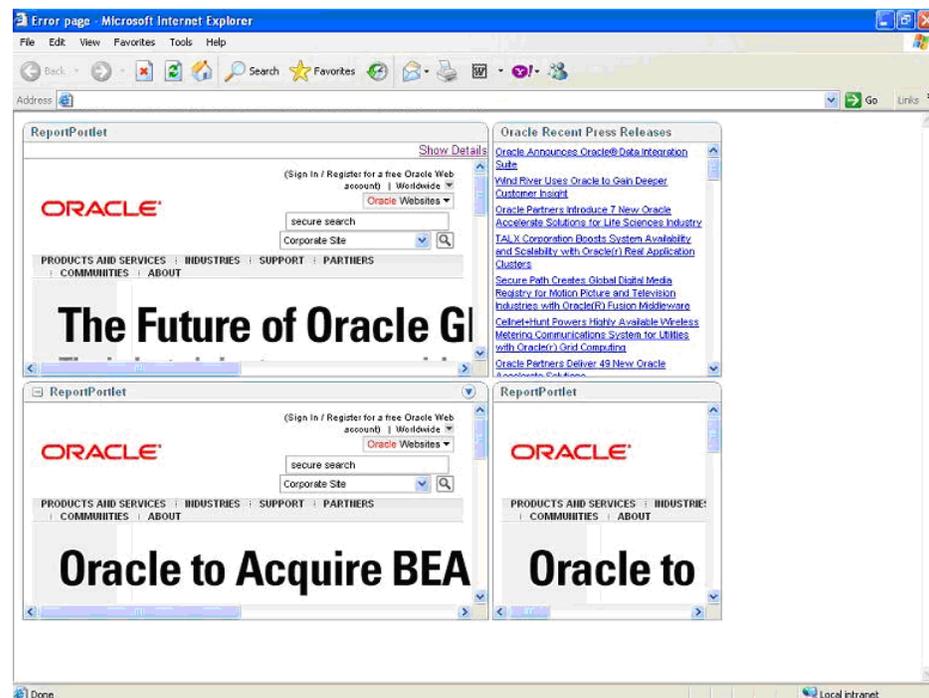
---

**Note:** The RSSPortlet supports RSS feeds that adhere to the RSS version 2.0 specification.

---

11. Select the PORTLET\_WIDTH variable for the RSSPortlet. In the property inspector, set the DefaultValue property to 300. Select the PORTLET\_HEIGHT variable for this portlet and set the DefaultValue to 230 in the property inspector.
12. Test the new Dashboard in JDeveloper.

Right-click on the MyDashboard.jspx page in the Application Navigation pane and click **Run** in the context menu. This launches the dashboard in a browser window.



## Summary of Portlet Parameters

**Table 8–1 Report and URL Portlet Input Parameters**

Parameter	Description
URL_TO_SHOW	This is the URL the portlet will display in its content space. It will be displayed as a source of an IFRAME.

**Table 8–1 (Cont.) Report and URL Portlet Input Parameters**

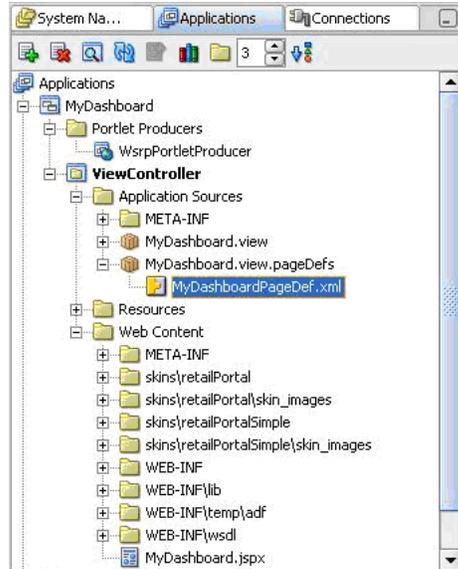
Parameter	Description
PORTLET_WIDTH	This is an optional parameter. The URL portlet width defaults to 400. If this parameter is set, it allows the dashboard developer to override the default width of the portlet.
PORTLET_HEIGHT	This is an optional parameter. The URL portlet height defaults to 250. If this parameter is set, it allows the dashboard developer to override the default height of the portlet.
ALT_URL	This is an optional parameter. If specified, the portlet will have a Hyperlink visible on the top-right that launches the specified URL in a separate window. The hyperlink label defaults to "Open in New Window" for a URL Portlet and "Show Details" for a Report Portlet. This can be overridden by setting ALT_URL_LABEL parameter.
ALT_URL_LABEL	This is an optional parameter. This is the label for the Hyperlink for alternate URL. If not set, the hyperlink label will default to "Open in New Window" for a URL Portlet and "Show Details" for a Report Portlet. Refer to <a href="#">"Internationalize the Dashboard Page"</a> for details on how to internationalize ALT_URL_LABEL.

**Table 8–2 RSS Portlet Input Parameters**

Parameter	Description
RSS_URL	This is the URL of the RSS feed that the portlet will display in its content space.
PORTLET_WIDTH	This is an optional parameter. The RSSPortlet width defaults to 325. If this parameter is set, it allows the dashboard developer to override the default width of the portlet.
PORTLET_HEIGHT	This is an optional parameter. The RSSPortlet height defaults to 250. If this parameter is set, it allows the dashboard developer to override the default height of the portlet.
SHOW_ITEM_DESCRIPTION	<p>The RSSPortlet displays a list of the RSS feed's &lt;item&gt; elements. Each &lt;item&gt; element is represented as a single hyperlink whose text is the value of the item's &lt;title&gt; element. The portlet displays one link per line.</p> <p>Some RSS Feeds have a description associated with items. By default, RSSPortlet will display the contents of the description below the item. By setting this optional parameter to FALSE, the dashboard developers can turn off this feature.</p>

**More Information about Page Definition Files**

Page definition files define the binding objects that populate the data in UI components at runtime. They are located under ViewController\Application Sources. The Application Navigator showing the location of MyDashboardPageDef.xml is shown in the following figure.



For more information, refer to the Page Definition section of the *ADF Developer's Guide*.

### Report Portlet Example



### RSS Portlets Example

**RSSPortlet with  
SHOW\_ITEM\_DESCRIPTION=FALSE**

**RSSPortlet with  
SHOW\_ITEM\_DESCRIPTION=TRUE**



## Adding Oracle Retail Skins to your Dashboard

In this lesson you will learn about ADF Faces skins and how to add the Oracle Retail skins to your dashboard.

### What is a Skin?

An Oracle ADF Faces skin applies a global style to the entire application. You can use style selectors in your own custom skin to modify selected aspects of a component or area of a component.

### Add the Oracle Retail Skin to your Dashboard

By default, JDeveloper configures ADF Faces applications to use the Oracle skin. The ORW application has been packaged with a custom skin. To be consistent with the default ORW look and feel, the same skin needs to be added to dashboards that are developed for ORW.

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**Note:** If you have customized the ORW skins, you should use your customized skins rather than the Oracle Retail skins.

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To add Oracle Retail skins:

1. The `RetailWorkspaceApplication.zip` file contains a dashboard development pack zip file - `orw-dashboards-devpack.zip`. The Retail Workspace skin jar is included in the dashboard development pack zip file. Extract this `oretail-skins.jar` file from `orw-dashboards-devpack.zip`, then unzip its contents to the `ViewController\public_html` directory of your MyDashboard application.

---

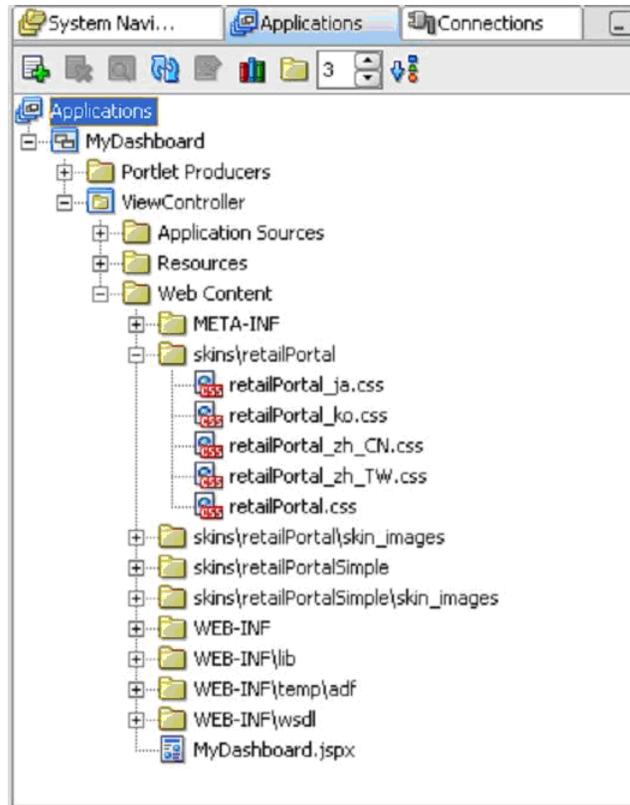
---

**Note:** The skins jar file includes an `adf-faces-skins.xml` file. This file contains the definition of the skin family provided by the Workspace. If you would like to preserve your own `adf-faces-skins.xml`, back it up first and then merge the two files.

---

---

2. In the JDeveloper Applications Navigator, refresh the MyDashboard ViewController Project to reflect the changes to the MyDashboard application. You should now see `skins\retailPortal` and `skins\retailPortalSimple` folders and sub-folders below `ViewController\Web Content`. You will be using the skins from `skins\retailPortal` as shown in the following figure.



3. Extract the `oretail-common.jar` file from `orw-dashboards-devpack.zip` and copy the intact jar into the `ViewController\public_html\WEB-INF\lib` directory of the MyDashboard application. Do not unzip its contents.

The `oretail-common.jar` contains the `SkinsBean` that is responsible for retrieving the appropriate Oracle Retail skin based on locale.

4. In the Application Navigator, expand the `ViewController/Web Content/WEB-INF` folder. Open `faces-config.xml` and edit the configuration file to include the `SkinsBean` managed bean, as shown in the following example:

```
<managed-bean>
  <managed-bean-name>skins</managed-bean-name>

  <managed-bean-class>oracle.retail.common.faces.bean.SkinsBean</managed-bean-class>
  <managed-bean-scope>session</managed-bean-scope>
  <managed-property>
    <property-name>skinsDirectory</property-name>
    <property-class>java.lang.String</property-class>
    <value>skins/retailPortal/</value>
  </managed-property>
  <managed-property>
    <property-name>baseSkinName</property-name>
    <property-class>java.lang.String</property-class>
    <value>retailPortal</value>
  </managed-property>
</managed-bean>
```

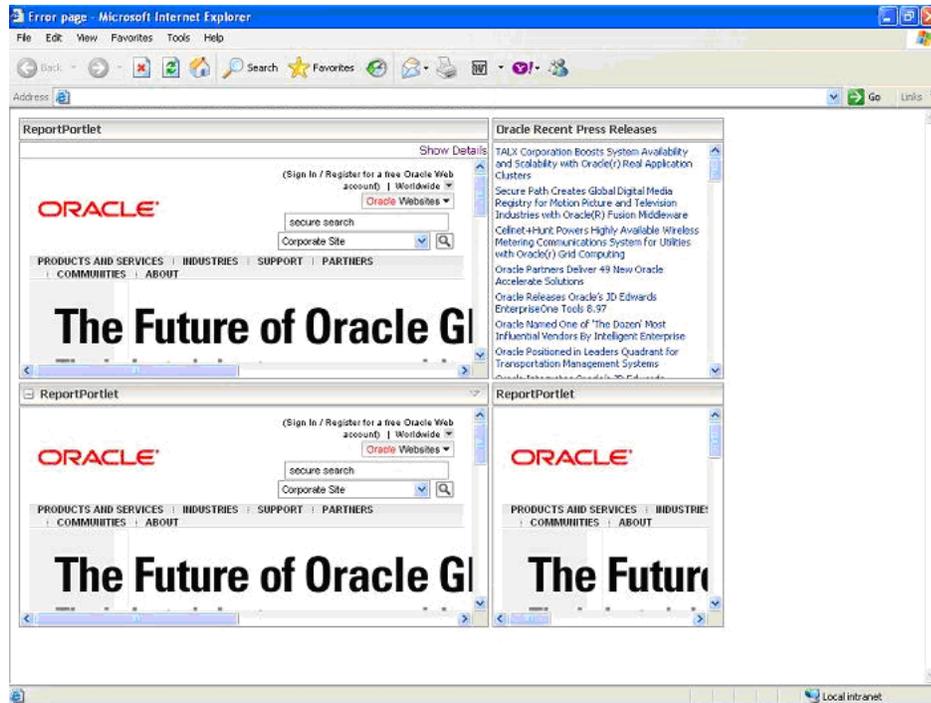
For more information about the `SkinsBean`, refer to ORW documentation.

5. Configure the MyDashboard application to use the skin.
  - a. In the Application Navigator, expand the ViewController/Web Content/WEB-INF folder. Open `adf-faces-config.xml` and edit the configuration file
  - b. In `adf-faces-config.xml`, the `<skin-family>` element configures the skin to be used. Replace the default value for `<skin-family>` (usually `oracle`) with an EL expression to get the skin name from the `SkinsBean`. The element should look like the following snippet of XML:

```
<skin-family>#{skins.skinName}</skin-family>
```

6. Right-click on the `MyDashboard.jspx` page in the Application Navigation pane and click **Run** in the context menu to test the dashboard with the new skin.

The following figure depicts the after affects of applying the skins. The most noticeable changes in appearance are the change in the font used in the RSS feed, and the change in the portlet header font and background.



## Troubleshooting

If you have installed the ORW skins but do not see the expected changes in appearance, do the following:

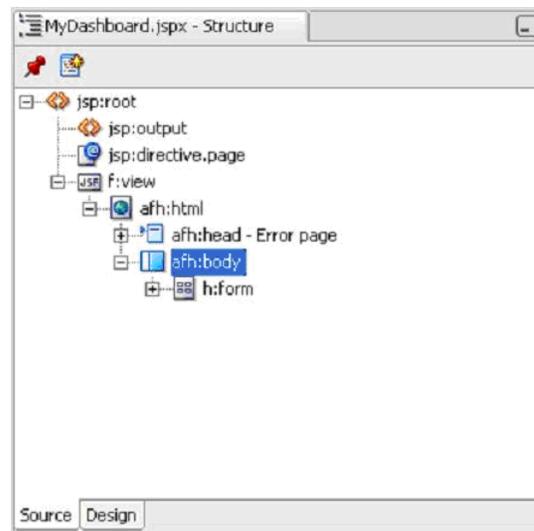
- Click the browser **Refresh** button to refresh your page. ADF Faces caches skin settings. Sometimes it is necessary to refresh the page to clear the cache.
- If refreshing the page does not work, open the Internet Explorer Internet Options dialog and delete temporary internet files.
- Make sure you copied the `skins` directory, including all skin files and subdirectories from `oretail-skins.jar` to below `ViewController\public_html`.

- Make sure you copied `oretail-common.jar` to the `WEB-INF\lib` directory of your MyDashboard project workspace.
- Make sure your `adf-faces-skins.xml` includes the `<skin>` elements that define the ORW skins. A sample version of this file is included in `oretail-skins.jar`.
- Make sure your `faces-config.xml` has been modified to configure a **skins** managed bean that references the `SkinsBean`.
- Make sure your `adf-faces-config.xml` has been modified to specify `{skins.skinName}` as the value of the `<skin-family>` element.

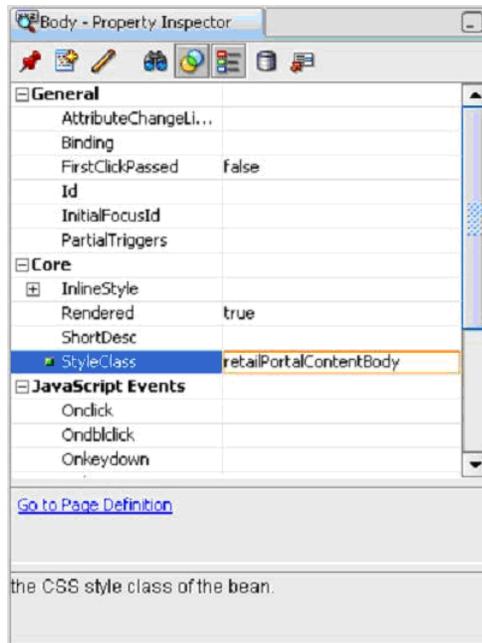
## Adding the *retailPortalContentBody* Style Class to Dashboard Body

When you display the dashboard in ORW, there is some extra space around the left and top of the dashboard as it gets rendered within the content area. To minimize this, you can use a style class that is defined in the `retailPortal` skin.

1. In the Applications Navigator, expand the View-Controller node and then expand the Web Content node. Select `MyDashboard.jspx` and open the page in the editor pane.
2. In the `MyDashboard.jspx` Structure pane, expand the `jsp:root`, `f:view` and `afh:html` nodes and select the `afh:body`.



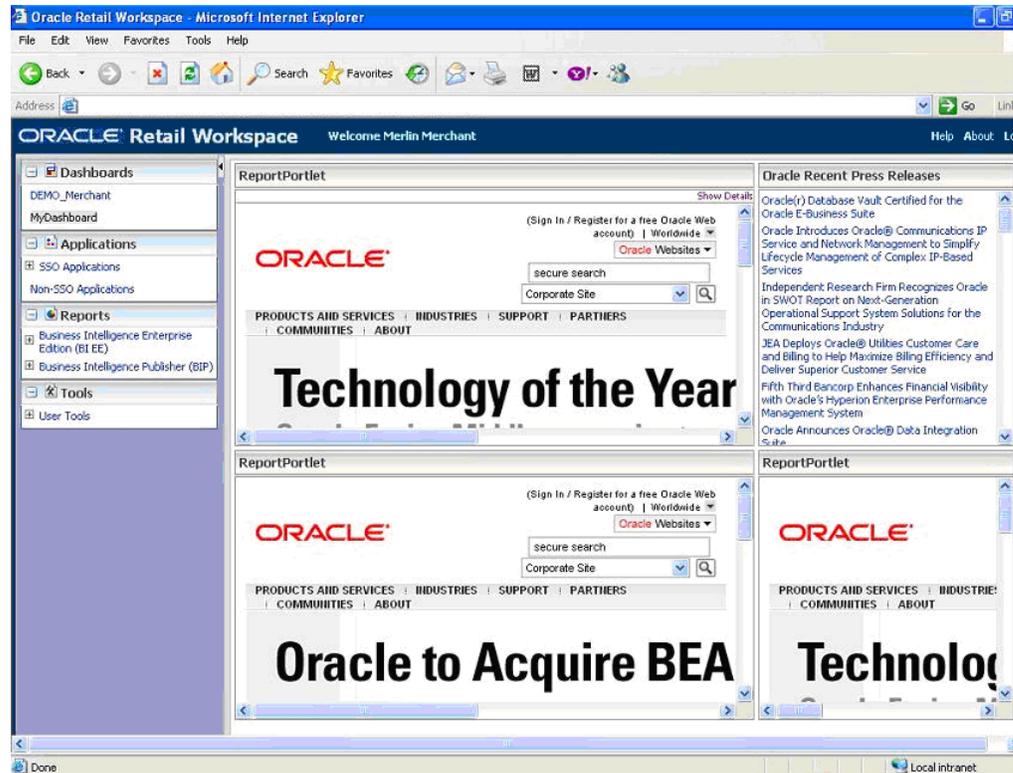
3. In the Property Inspector for the Body component, set the value of the `StyleClass` property to `retailPortalContentBody`. This style class is defined in the Retail Workspace skin. The style class sets the default padding and insets of the body to 0, which removes any default padding and insets.



4. Now that you have removed the default padding and insets, you may find that you need to add back space around the portlets. You may need to insert `ObjectSpacer` components as necessary to the left of the first portlet in each row and to the right of the last portlet in each row. Set the width property of the `ObjectSpacer` to 4 to match the horizontal spacing you set in a previous chapter.

You may also have to insert an `ObjectSpacer` before the first inner `PanelCustomizable` and after the last inner `PanelCustomizable`. Set the height property to 4 to match the vertical spacing you set in a previous chapter.

The following figure shows `MyDashboard` after making these changes.



## Securing the Dashboard

This lesson explains how to secure your dashboard so that only authorized users can access it. Security for ADF applications is explained further in Chapter 18 of the *Oracle® Application Development Framework Developer's Guide*.

So far in this tutorial, the dashboard has no security mechanisms in place. It is simply a JSF application that may be deployed and is open to anybody. This section details how to add security mechanisms to the dashboard to insure only authorized users are allowed to access the dashboard.

There are multiple security mechanisms in place with ADF and the ORW implementation. The first involves standard J2EE Web application security. Standard container managed security involves the Java Authentication and Authorization Service (JAAS). Oracle's implementation of this service is known as JAZN.

Two basic concepts of security are:

- Authentication—insuring a user is who the user claims to be.
- Authorization—allowing (or denying) a user specific capabilities.

For a dashboard, authentication must be provided by the Oracle Single Sign-On (OSSO) subsystem. This allows a user to have to enter credentials (user ID and password) once per HTTP session. In order to leverage the OSSO subsystem, the dashboard must be configured with specific entries in its deployment descriptors.

The first deployment descriptor is the `web.xml` file. This is a standard J2EE file included with all web applications. There are a few requirements for this file:

- It must define the ADF Authentication servlet, including initialization parameters.
- It must define the URI of the ADF Authentication servlet.

- It must define an authentication security constraint on the ADF authentication servlet.
- It must declare all logical roles referenced by the ADF Authentication servlet.

One important but slightly confusing issue is that although the dashboard is the entity requiring an authenticated user, the security constraint is placed on the ADF Authentication servlet, not the dashboard page.

Authorization for accessing specific JSPX pages is provided by the ADF infrastructure as well. ADF provides mechanisms to control fine-grained access control to JSPX files and to resources found on these files, such as database connections. When correctly configured, the ADF infrastructure will deny access without an application developer writing any security specific code. However, there are specific configuration entries required for this.

The final source of security is supplied by the ORW framework. This software verifies that a user only sees the work lists, external links, and dashboards appropriate for a user.

In summary, the following needs to be performed to ensure a dashboard is secure:

1. Run the ADF Security wizard.
2. Edit the `web.xml` deployment descriptor.
3. Create the `orion-web.xml` deployment descriptor file to correctly map the logical role for a dashboard to an actual or physical role.
4. Update the `adf-config.xml` file to insure page-level security is in place.
5. Edit the `system-jazn-data.xml` file for the embedded OC4J for use with all of the above. Add a permission grant to allow access to the dashboard.

---

---

**Note:** ORW requires a running Oracle Internet Directory for a production deployment. However, the instructions above use the OC4J XML file security provider to add security. Details on how to convert from the XML file security provider to the OID LDAP security provider are explained later.

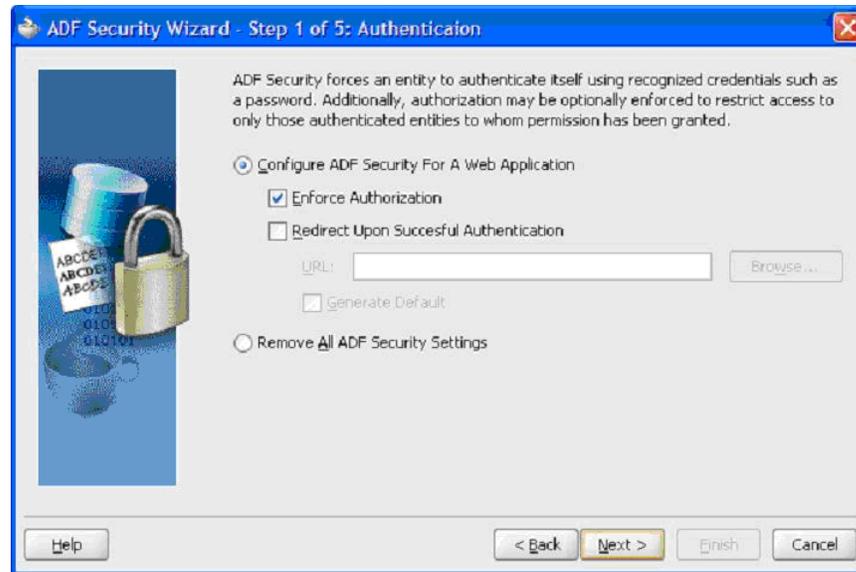
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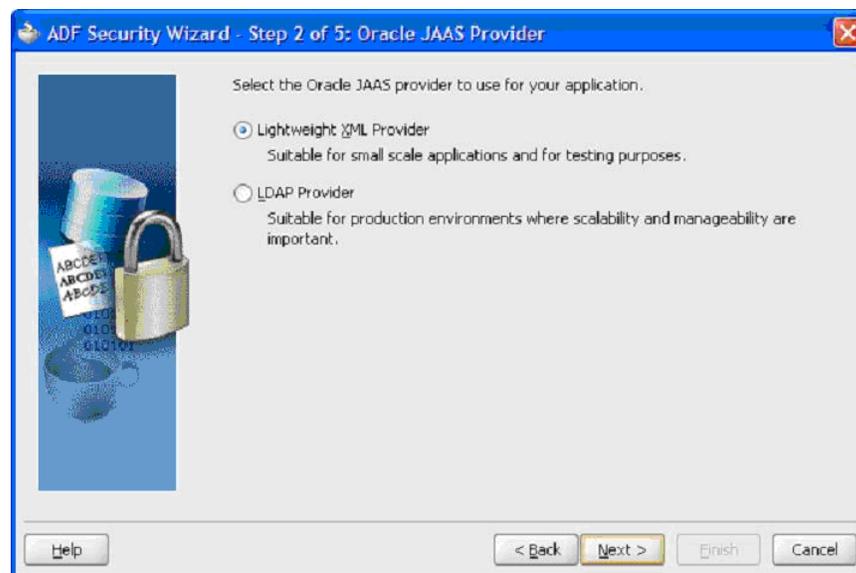
## Run the ADF Security Wizard.

To run the ADF security wizard:

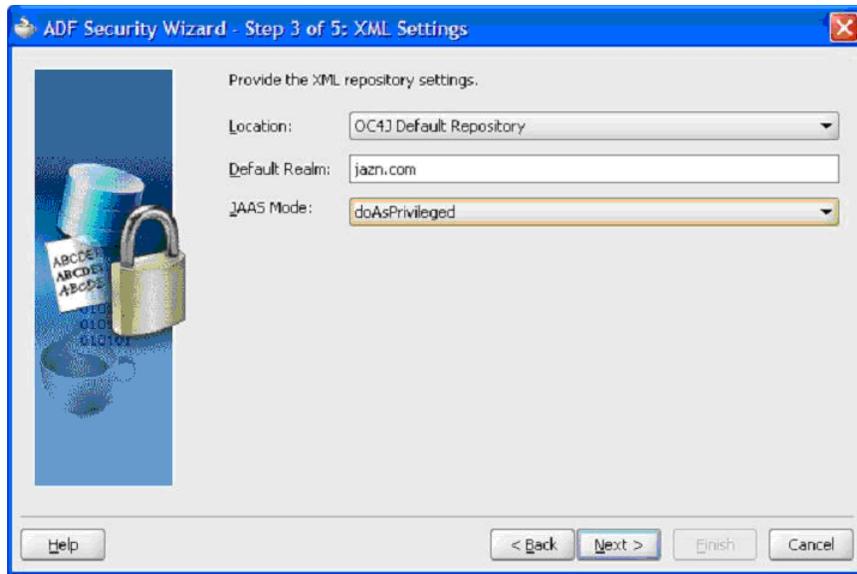
1. Highlight **ViewController** in the Navigation pane and select the **ADF Security Wizard** under the Tools menu.
2. If a Welcome window appears, click **Next**. This should bring up the following display:



3. Check the **Enforce Authorization** checkbox and click **Next**.



4. Check **Lightweight XML Provider** and click **Next**.



5. Specify the OC4J Default Repository, the jazn.com default repository, and a JAAS Mode of **doAsPrivileged**. Click **Next**.

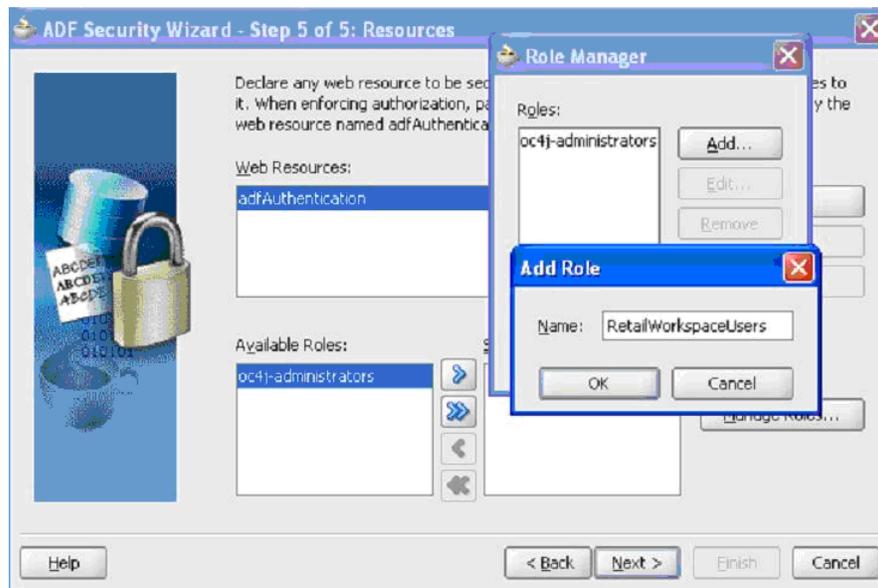
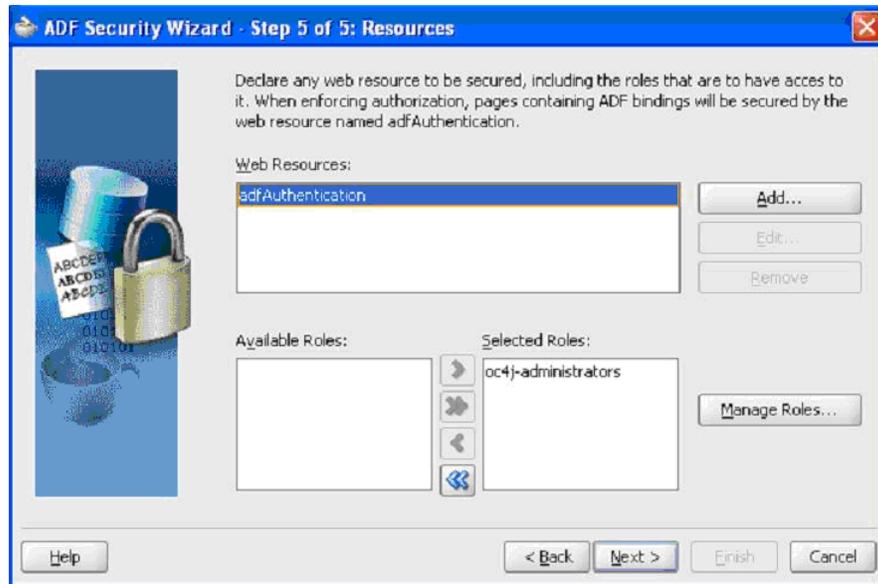


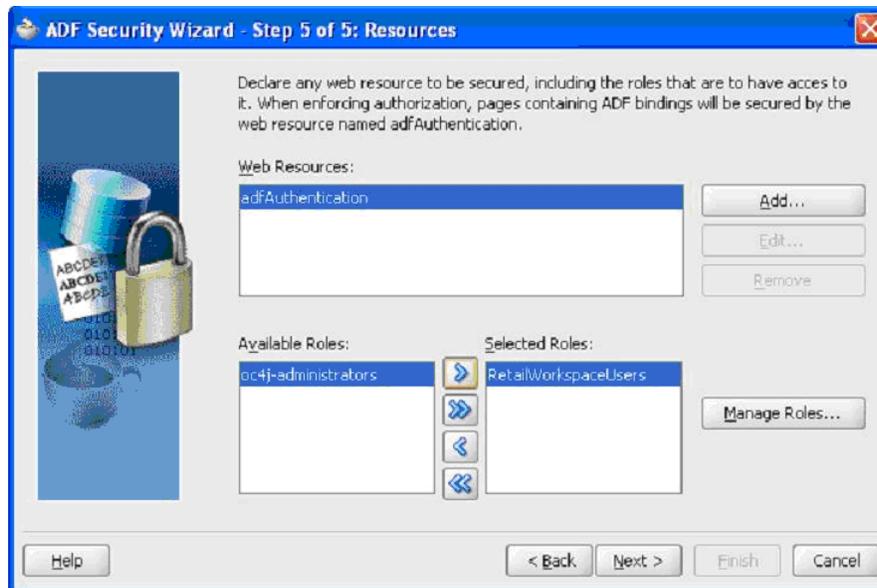
6. Check **HTTP Basic Authentication**. Leave the Realm empty and click **Next**.

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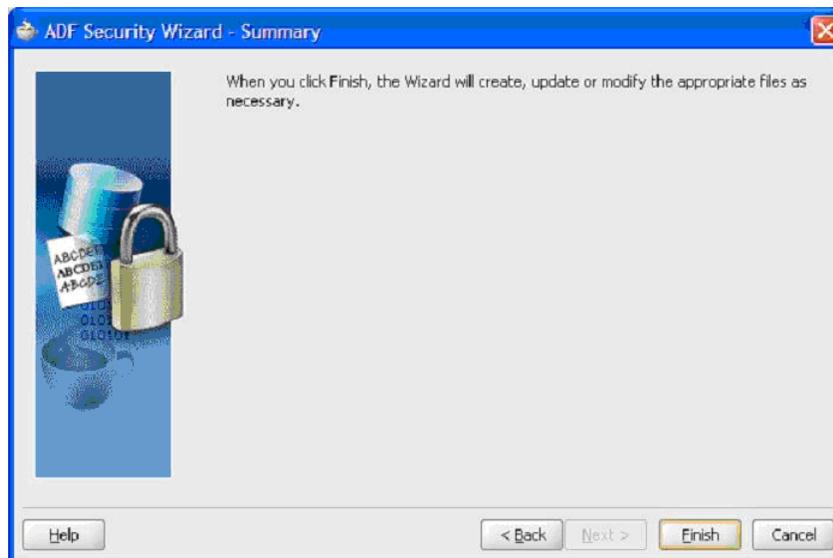
**Note:** In the production deployment, the login page is supplied by the Oracle Single Sign-On server.

---





7. On this screen, you may see **oc4j\_administrators** as a Selected Role. Move that to the Available roles and click on **Manage Roles** to define the logical roles for the application. This brings up the Role Manager dialog. Add **RetailWorkspaceUsers** as a new role and click **OK**. Make sure **RetailWorkspaceUsers** is in the Selected Roles box and click **Next** to bring up the Summary page:



8. To close the wizard, click **Finish**.

### Edit the web.xml Deployment Descriptor

The following steps create the logical role, **RetailWorkspaceUsers**, and add a security constraint that forces a user to be an authenticated member of this group in order to access your page. ADF security will also enforce that the user has been granted the correct permissions.

1. Open the ViewController folder. Select **Web Content**, then **public\_html**, then **WEB-INF**, and double-click on the `web.xml` file. There are three sections of text that need to be placed within the `<web-app>` tag in this file:
2. The `adfAuthentication` servlet must be defined in `web.xml`. ADF applications delegate authentication and authorization activities to the `adfAuthentication` servlet. This servlet must be defined in the `web.xml` file or else the application server will not allow any requests made to it. The entries that define the ADF authentication servlet are shown in the following example:

```
<servlet>
  <servlet-name>adfAuthentication</servlet-name>
  <servlet-class>
oracle.adf.share.security.authentication.AuthenticationServlet</servlet-class>
  <load-on-startup>1</load-on-startup>
  <security-role-ref>
    <role-name>RetailWorkspaceUsers</role-name>
    <role-link>RetailWorkspaceUsers</role-link>
  </security-role-ref>
</servlet>

<servlet-mapping>
  <servlet-name>adfAuthentication</servlet-name>
  <url-pattern>/adfAuthentication/*</url-pattern>
</servlet-mapping>
```

The `<servlet>` tag defines the servlet and the fact that the logical role name, `RetailWorkSpaceUsers`, is referenced by servlet. The `<servlet-mapping>` tag defines the URI used to access the ADF Authentication servlet.

3. Apply authentication constraints to the ADF authentication servlet. An authentication constraint specifies to the application server that only authenticated users with a specific logical role are allowed to access a set of URLs. See the following example:

```
<security-constraint>
  <web-resource-collection>
    <web-resource-name>adfAuthentication</web-resource-name>
    <url-pattern>/adfAuthentication</url-pattern>
  </web-resource-collection>
  <auth-constraint>
    <role-name>RetailWorkspaceUsers</role-name>
  </auth-constraint>
</security-constraint>
```

4. Declare the logical roles used by the Dashboard and the authentication constraints. Proper `web.xml` files declare all logical roles. See the following example:

```
<security-role>
  <role-name>RetailWorkspaceUsers</role-name>
</security-role>
```

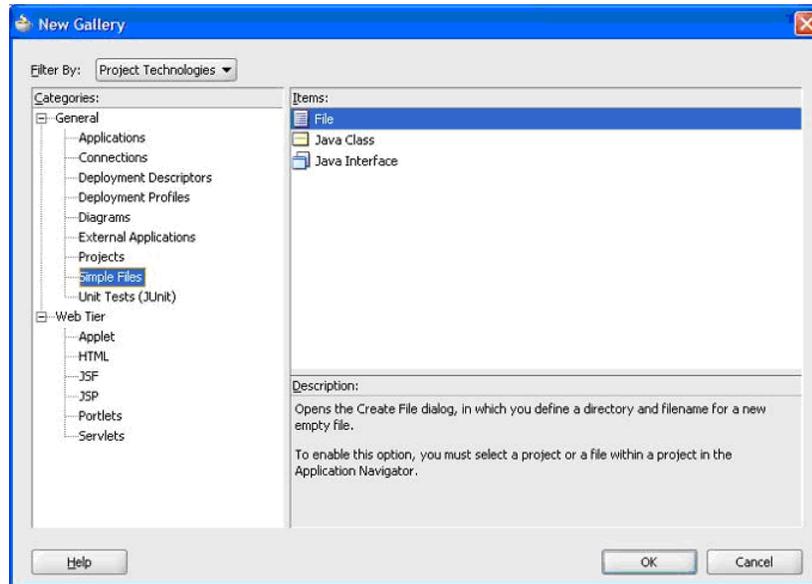
5. Finally, you need to add a mechanism for the user to use to authenticate (log in) with. This is done via the `<login>` element. The text below specifies BASIC authentication, in which a standard pop-up window is used for logging in.

```
<login-config>
  <auth-method>BASIC</auth-method>
</login-config>
```

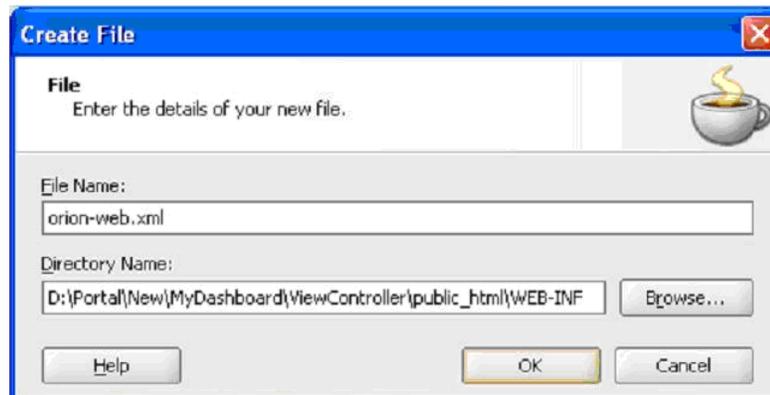
## Create the orion-web.xml Deployment Descriptor

You need to create the orion-web.xml deployment descriptor to correctly map a dashboards logical role to an actual role.

1. Right-click on the Web Content, then select **public\_html**, and then the **WEB-INF** folder. Select the **New** menu item.
2. From the New Gallery window, under Categories select **Simple Files** and under Items select **File** as shown below.



3. Click **OK** and create the file named `orion-web.xml` in the `WEB-INF` directory:



4. Put the following text into the new `orion-web.xml` file:

```
<?xml version = '1.0' encoding = 'windows-1252'?>
<orion-web-app
  xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
  xsi:noNamespaceSchemaLocation=
    "http://xmlns.oracle.com/oracleas/schema/orion-web-10_0.xsd"
  schema-major-version="10" schema-minor-version="0"
  servlet-webdir="/servlet/">
  <security-role-mapping name="RetailWorkspaceUsers" impliesAll="false">
    <group name="Retail_Workspace_Users"></group>
```

```

</security-role-mapping>
<jazn-web-app runas-mode="true" doasprivileged-mode="true" />
</orion-web-app>

```

### Create/Update the `adf-config.xml` File

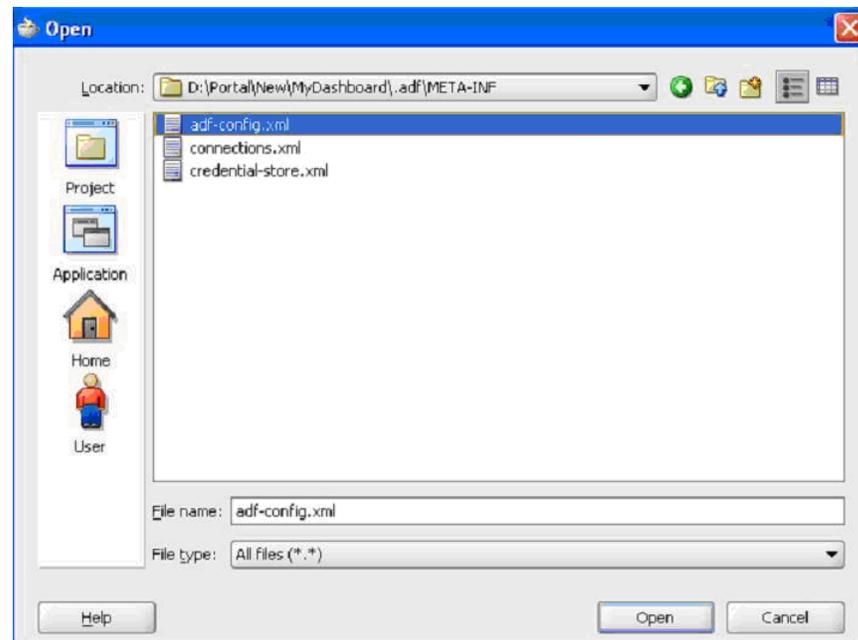
You need to create or update the `adf-config.xml` file to ensure page-level security is in place.

If the `adf-config.xml` file does not exist, you need to create a new one.

To determine if the file exists, click on File and then open. Try to open the following file:

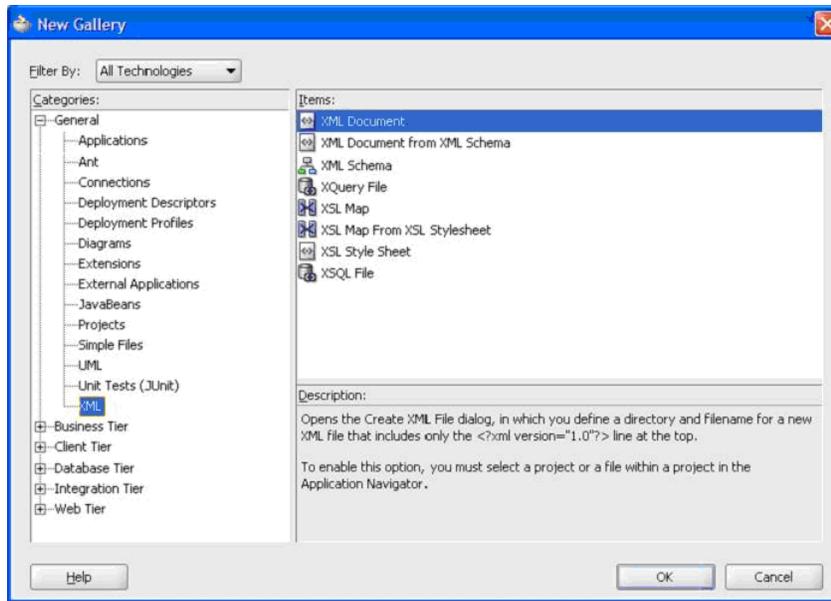
```
<Dashboard application dir>/\adf\META-INF\adf-config.xml
```

Where `<Dashboard application dir>` is the root directory of the dashboard application. Note that the `.adf` folder is found in the same folder on the file system as the `ViewController` folder.

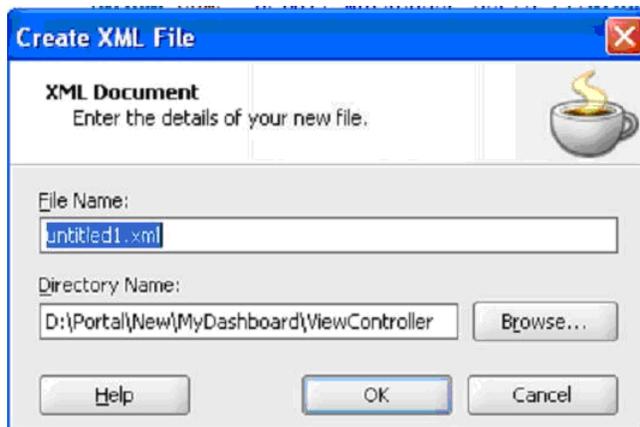


If the `adf-config.xml` file already exists, open it and skip the following section.

1. Cancel out of the Open dialog.
2. Right-click on the View-Controller project and select the **New** menu item.
3. From the New Gallery window, find the **Filter by** menu and select **All Technologies**.
4. Under Categories, select **XML**.
5. Under Items, select **XML Document** as shown below.



- To bring up the following dialog window, click **OK**:



- Enter the File Name of `adf-config.xml` and a directory name of `<application directory>/ .adf/META-INF` (`<application directory>` is where the JDeveloper application files are stored). To search for a directory, click **Browse**.
- Once `adf-config.xml` exists, open the file via the File open dialog. Then, modify the file as detailed in the section below.

**Skip to here if the `adf-config.xml` file already exists.**

At the bottom of this file just before the closing `</adf-config>` tag, you will see the `<adf-config-child>` element. This element should contain an empty `<JaasSecurityContext/>` element. Replace this element with the one detailed below:

```
<JaasSecurityContext
initialContextFactoryClass="oracle.adf.share.security.JAASInitialContextFactory
"
    authorizationEnforce="true"
```

```

jaasProviderClass="oracle.adf.share.security.providers.jazn.JAZNSecurityContext
" >
</JaasSecurityContext>

```

The `<adf-config-child>` element will most likely contain another element besides the `<JaasSecurityContext>`. This additional element is the `<CredentialStoreContext>` element and is used to store user credentials used with portlet producers. If this tag exists, you should keep it untouched. In this scenario, the end of the `adf-config` file would look similar to the following:

```

<adf-config-child xmlns="http://xmlns.oracle.com/adf/security/config">
    <CredentialStoreContext

credentialStoreClass="oracle.adf.share.security.providers.jazn.JAZNCredentialStore"

                                credentialStoreDefaultUser="anonymous"
                                credentialStoreLocation="./credential-store.xml" />

    <JaasSecurityContext

initialContextFactoryClass="oracle.adf.share.security.JAASInitialContextFactory
"
authorizationEnforce="true"

jaasProviderClass="oracle.adf.share.security.providers.jazn.JAZNSecurityContext
" >
    </JaasSecurityContext>
    </adf-config-child>
</adf-config>

```

After modifying the `adf-context.xml` file, save and close the file.

## Edit the system-jazn-data.xml File and Add a Permission Grant

---

**Note:** The following instructions edit the embedded OC4J's `system-jazn-data.xml` file. Alternatively, you can use the Tools->Embedded OC4J System Preferences to achieve the same results. See the *ADF Developers Guide* for more details.

---

Edit the `system-jazn-data.xml` file for the embedded OC4J and add a permission grant to allow access to the dashboard.

All of the previous steps allow the dashboard application to be securely deployed. But the embedded OC4J (the application server where you test the dashboard) must have the correct security configuration to allow access to the dashboard. This configuration includes roles, users, and to these roles and users.

JDeveloper deploys applications to the embedded OC4J configured to use the XML File-based Security provider. This means that all of the security information is provided in the embedded OC4J `system-jazn-data.xml` file. The location of this file is the folder:

```

<JDeveloper Install>/jdev/system/oracle.j2ee.10.1.3.<XX.YY>/
embedded-oc4j/config

```

`<JDeveloper Install>` is the directory where JDeveloper is installed. `<XX.YY>` is the system release version, for example, 41.57.

The first thing to do to `system-jazn-data.xml` is to create a user. To create a new user ID in this file, search for the `<users>` tag and add in a `<user>` element to define the new user's name, display name, and password.

```
<user>
<name>aUserName</name>
<display-name>A User Name</display-name>
<description>A description </description>
<credentials>!aPassword</credentials>
</user>
```

Where:

- **aUserName** should be the desired user name ID
- **A User Name** should be the display name of the user ID
- **A description** should be a short description of the user ID
- **aPassword** is the user's password. Make sure that this entry begins with an exclamation mark. The password used should not contain an exclamation mark.

If you were to add in the example `<user>` element verbatim, you would log in with the user name of 'aUserName' and a password of 'aPassword'.

The embedded OC4J reads this entry the next time it is started. At this time it replaces the string 'aPassword' with a one-way hash value. It also generates a unique GUID string.

Next, you need to create the role for the user. Search the `system-jazn-data.xml` file for the `<roles>` element and create two roles: `Retail_Workspace_Users` and the roles that will be granted permission to access the dashboard. For example,

```
<role>
<name>A_Role_Name</name>
<members>
<member>
<type>user</type>
<name>aUserName</name>
</member>
</members>
</role>
<role>
<name>Retail_Workspace_Users</name>
<members>
<member>
<type>role</type>
<name>A_Role_Name</name>
</member>
</members>
</role>
```

Where:

- **aUserName** should be the desired user name ID mentioned above
- **A\_Role\_Name** should be the new role name

---

---

**Note:** The definition of the `A_Role_Name` role must come before the definition of the `Retail_Workspace_Users` role.

---

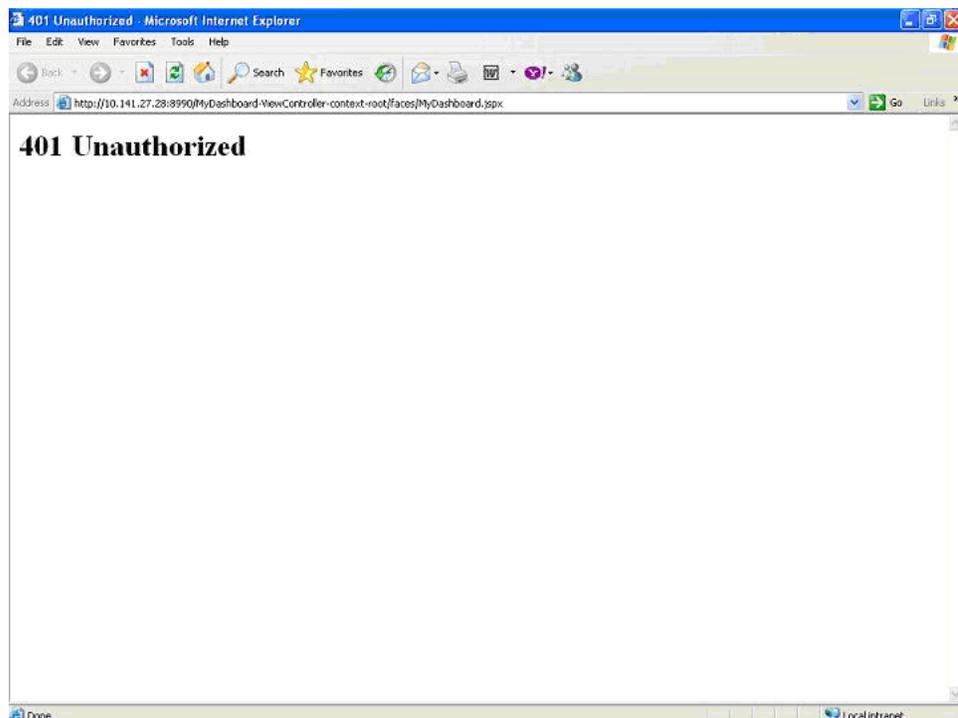
---

You can add multiple users and roles to an existing role.

Once you have edited the `system-jazn-data.xml` file of the embedded OC4J, you should be able to run your dashboard and be prompted for a user name and password.



Once logged in, though, you will not be able to access your dashboard. You get a 401 Unauthorized error. The reason is that you now have a secured application, but you have not granted permission to any users to access it. In effect you have an application that nobody is allowed to use.



To grant permissions, you must edit the `system-jazn-data.xml` file and add a grant to the JAZN policy. The JAZN policy is encapsulated in the `<jazn-policy>` element. ADF requires a specific type of entry here to allow access to a given page. To grant access to view a JSPX page, you create a permission grant for the page definition file for that page.

See the following example:

```
<grant>
<grantee>
<principals>
<principal>
<type>role</type>
<class>oracle.security.jazn.spi.xml.XMLRealmRole</class>
<name>jazn.com/A_Role_Name</name>
</principal>
</principals>
</grantee>
<permissions>
<permission>
<class>oracle.adf.share.security.authorization.RegionPermission</class>
<name>pageDefinitionpackage.pageDef_ID</name>
<actions>view</actions>
</permission>
</permissions>
</grant>
```

Where:

- A\_Role\_Name** is the name of the role to be granted permission.  
**pageDefinitionpackage.pageDef\_ID** is the JSPX page definition file package name and ID. To get the correct value, right-click on the jsp page in the Application Navigation pane and click **Go to Page Definition**. The package name and ID is found within the `<pageDefinition>` element. For example,

```
<pageDefinition xmlns="http://xmlns.oracle.com/adfm/uimodel"
version="10.1.3.41.57" id="MyDashboardPageDef"
Package="MyDashboard.view.pageDefs">
```

results in the string:

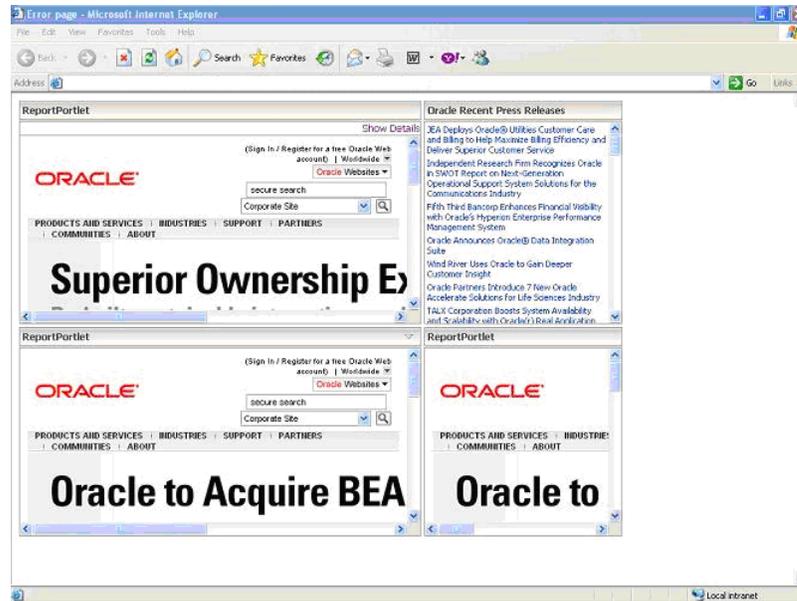
```
MyDashboard.view.pageDefs.MyDashboardPageDef
```

---

**Note:** If the same grant is to be made to multiple roles, you may put multiple `<principal>` tags into a single `<principals>` element. However, this same technique does not apply to the `<permission>` element. Do not place multiple `<permission>` tags within a single `<grant>`, as the semantics are not the same.

---

As with new users and roles, the embedded OC4J must be restarted before it can see any new . At this point, the new dashboard has been made secure, and only authorized users can access the page.



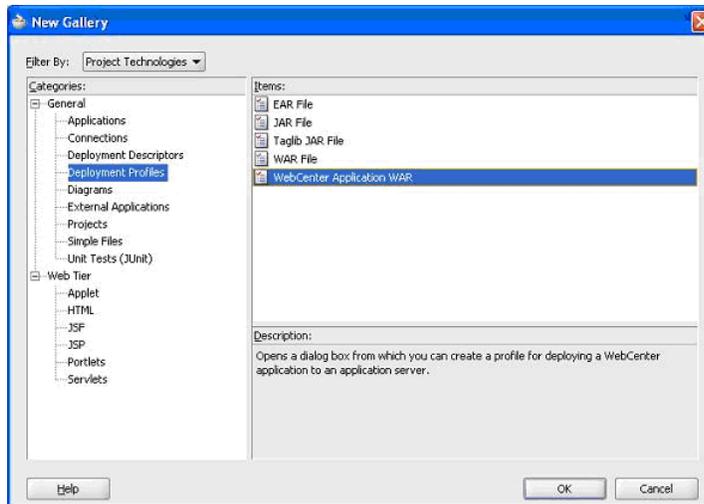
## Deploying the Dashboard

Once the dashboard has been made secure and has been tested, it can be deployed to an Oracle Application Server. The following steps to deploy the dashboard are explained in this section:

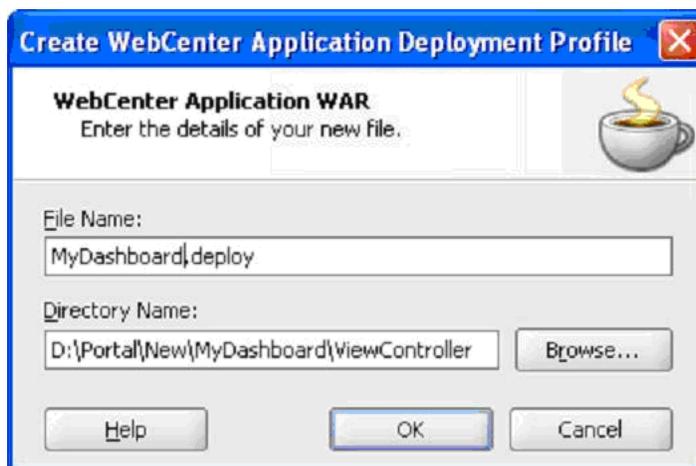
- Create a deployment profile in JDeveloper.
- Deploy the dashboard to a generic EAR.
- Copy the EAR to the destination OAS host or shared network drive.
- Create the targeted Dashboard EAR.
- Deploy the EAR.

## Creating a Deployment Profile

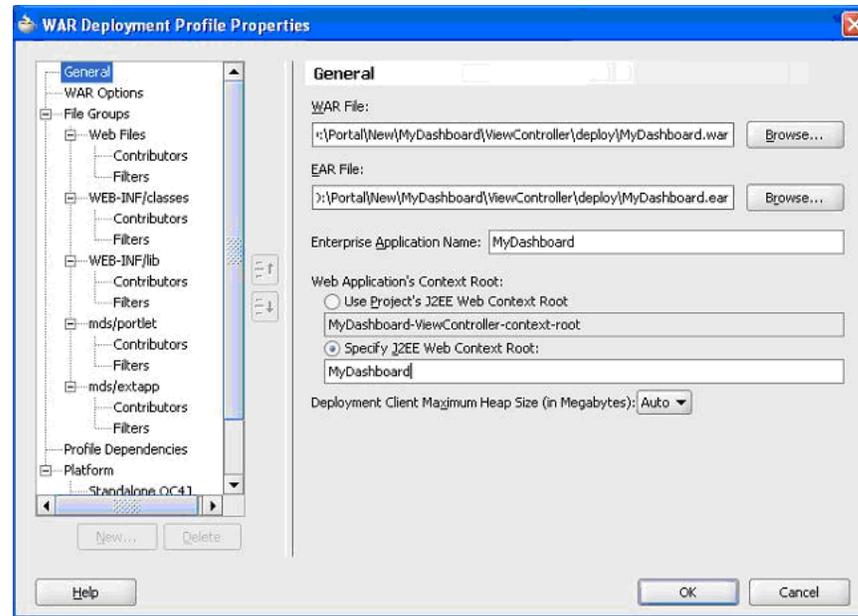
1. In the Applications Navigator, right-click the **ViewController** project and select **New** from the context menu.
2. In New Gallery under Categories, expand the **General** node and select **Deployment Profiles**.
3. In New Gallery under Items, select **WebCenter Application War**.
4. Click **OK**.



5. In the Name field enter the Name of the Deployment Profile (for example, MyDashboard.deploy), allow the Directory Name to default, and click **OK**.



6. In the Applications Navigator, open the Resources folder of the ViewController project, right-click the newly created deployment profile, and select properties from the context menu.
7. Select the **Specify the web context root** option and enter a value for the field, for example, MyDashboard.



8. Click **OK**.

## Define a Connection to the PreConfigured OC4J

Icons for starting and stopping the preconfigured OC4J display in the Oracle JDeveloper toolbar.

Icon	Description
	To start the preconfigured OC4J, click the Start WebCenter Preconfigured OC4J icon
	To stop the preconfigured OC4J, click the Stop WebCenter Preconfigured OC4J icon

The first time you start the preconfigured OC4J, a dialog tells you that the WebCenter preconfigured OC4J is not installed in the current user directory. This dialog offers you the option of installing it in the current user directory. Select **Yes**.

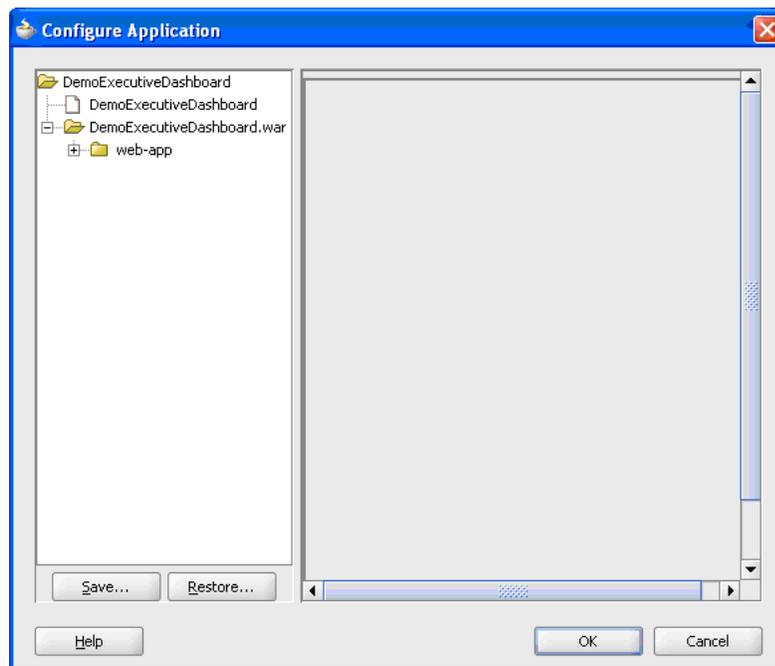
1. In the Applications Navigator, right-click the Dashboard application and select **New** from the context menu.
2. In New Gallery under Categories, expand the **General** node and select Connections.
3. In New Gallery under Items, select **Application Server Connection**.
4. Click **OK**.
5. On the Welcome page, click **Next**.
6. In the Connection Name field, enter a name for the connection (LocalOC4J).
7. In the Connection Type field, select **Standalone OC4J 10g 10.1.3**.
8. Click **Next**. On the Authentication screen, in the Username field, enter oc4jadmin. In the Password field enter welcome. Click the **Deploy Password** check box.

9. Click **Next**. On the Connection screen, in the Hostname field enter localOC4J. In the RMI Port field enter 22667. Leave the URL Path field empty.
10. Click **Next**. Click **Test Connection** to test the connection to localOC4J.

## Deploy Dashboard to PreConfigured OC4J

By deploying the dashboard to the preconfigured OC4J, you are testing your deployment profile in a controlled environment.

1. In the Applications Navigator, right-click the newly created deployment profile (MyDashboard.deploy) and select **Deploy to** from the context menu.
2. Select the connection name for deployment that you just created. (localOC4J).  
JDeveloper prompts you for an MDS location.
3. Specify a directory for MDS. If the directory doesn't exist, it will be created. Do not use a directory that is already in use for another dashboard, for example, `c:\mids`.  
A Configure Application screen similar to the following appears.



4. Click on **OK**.  
In your deployment log tab you should see a deployment-finished message.
5. Once deployed, test your dashboard by entering the URL of your deployed dashboard in the browser window. The URL has a similar format to the following:

```
http://<your IP address>:6688/<web context root>/faces/<DashboardName.jspx>
```

For example:

```
http://myhost/MyDashboard/faces/MyDashboard.jspx
```

---

**Note:** If you are running the browser on the same machine as LocalOC4J, you should use your localhost instead of your IP address.

---

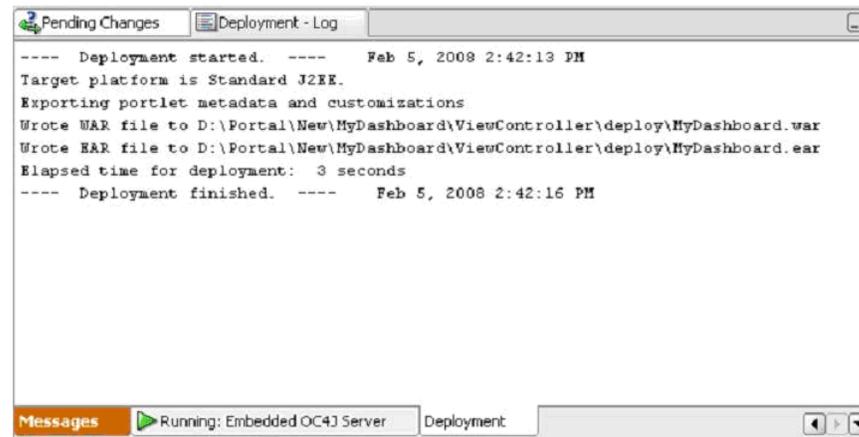
## Deploy the Dashboard to Generic Ear

In the following steps you will create the generic EAR. In a later section of this chapter you will run a tool to convert this EAR to one that can be deployed on your application server.

1. In the Applications Navigator, right-click the deployment profile created above (MyDashboard.deploy) and select **Deploy to EAR file** from the context menu.
2. The deployment finished message appears in the Deployment - Log window. The log should also tell you where it placed the ear.

On Windows, the location of the EAR file is:

```
<Application root>\ViewController\deploy\MyDashboard.ear
```



## Convert the Generic Ear to the Targeted Ear

Before deploying your EAR file, the development references contained in the file must be modified to be specific to the target instance.

Oracle Application Server with WebCenter Extensions provides a Predeployment Tool that is used to create targeted EAR files from generic EAR files. The Predeployment Tool must be run on the same host where the dashboard is to be deployed. The Predeployment tool uses the `-jar java` command line, which calls `portlet-client-deploy.jar` that ensures the correct classpath and main class for the tool. By default, the Predeployment tool JAR and its dependencies are located in `ORACLE_HOME/adfp/lib`.

1. FTP the file `MyDashboard.ear` to the target system on which it will be deployed.
2. Run the following command from `$ORACLE_HOME` of the OAS where the dashboard will be deployed to:

```

$ORACLE_HOME/jdk/bin/java -jar $ORACLE_HOME/adfp/lib/
portlet-client-deploy.jar -predeploy -source <genericEAR>
-target <targetedEAR>
  
```

Where:

- `portlet-client-deploy.jar` is the predeployment JAR file from which the Predeployment tool is run.
- `<genericEAR>` is the generic EAR file created using Oracle JDeveloper.

- `<targetedEAR>` is the targeted EAR file, which the Predeployment tool creates during predeployment.

For example:

```
$ORACLE_HOME/jdk/bin/java -jar $ORACLE_HOME/adfp/lib/portlet-client-deploy.jar -predeploy -source MyDashboard.ear -target ./MyDashboard_Targeted.ear
```

The predeployment tool prompts for the following information:

- New MDS Repository Path on the target system. If you will be deploying multiple dashboards, you must keep MDS locations separate for each of the dashboard applications.
- A New Service URL. Since your dashboard uses portlets, the Predeployment Tool prompts for the service URL for the portlets accessible from the targeted system. The service URL has the same format as specified when creating a portlet producer.

You change the service URL in a scenario similar to the following example:

You develop the dashboard using ORW portlets that have been deployed to a development application server. Then during pre-deployment of the production version of the dashboard, you can re-target to point to an instance of the ORW portlets that has been deployed to a production application server. In that case, for **new service URL**, you specify the URL to the production deployment of the portlets.

3. If you do not need to specify a new service URL, that is, use the portlet producer that was used during development, click **Enter** to leave the URL unchanged.

For more information, refer to the Deploying your WebCenter Application section of the WebCenter documentation.

## Deploy the Targeted EAR to OAS

The targeted EAR file is deployed to OC4J in Oracle Application Server in the production environment, using Application Server Control Console (or the Enterprise Manager).

Refer to section 12.2.3 Deploying Your WebCenter Application Using Application Server Control Console of the JDeveloper documentation at [http://download.oracle.com/docs/cd/B32110\\_01/webcenter.1013/b31074.pdf](http://download.oracle.com/docs/cd/B32110_01/webcenter.1013/b31074.pdf).

## Deploying a Dashboard with Oracle Single Sign-On

Oracle Single Sign-On is a Web technology. It is implemented in the HTTP Server that typically front-ends an application server. The OC4J application servers distributed with JDeveloper do not have an associated HTTP Server. However, HTTP servers are bundled with the standard Oracle Application Server 10g.

## Using the OIM Security Provider

There are two ways an application can be configured to use Oracle Single Sign-On.

- Create or edit the `orion-application.xml` deployment descriptor found in an EAR to use the Oracle Identity Management Security Provider.

- Change the security provider from the XML File Security Provider, `system-jazn-data.xml`, to the Oracle Identity Management Security Provider during or after the dashboard has been deployed.

In either case, the OC4J instance that the dashboard is deployed to must have an association with the OID LDAP associated with the Oracle Identity Management server. This association is documented in the *Oracle Application Server Administration Guide*.

### Option 1: Creating or Editing the `orion-application.xml` File

The first option is to edit the `orion-application.xml` file, found in the META-INF folder. This option has the advantage that the correct security provider will be in place within the dashboard EAR file. Unfortunately, the embedded OC4J is typically not configured to use an Oracle Identity Management LDAP as its security provider. You need to use an alternate version when developing or updating the dashboard. An example of an `orion-application.xml` configured to use Oracle SSO is shown below:

```
<?xml version="1.0"?>

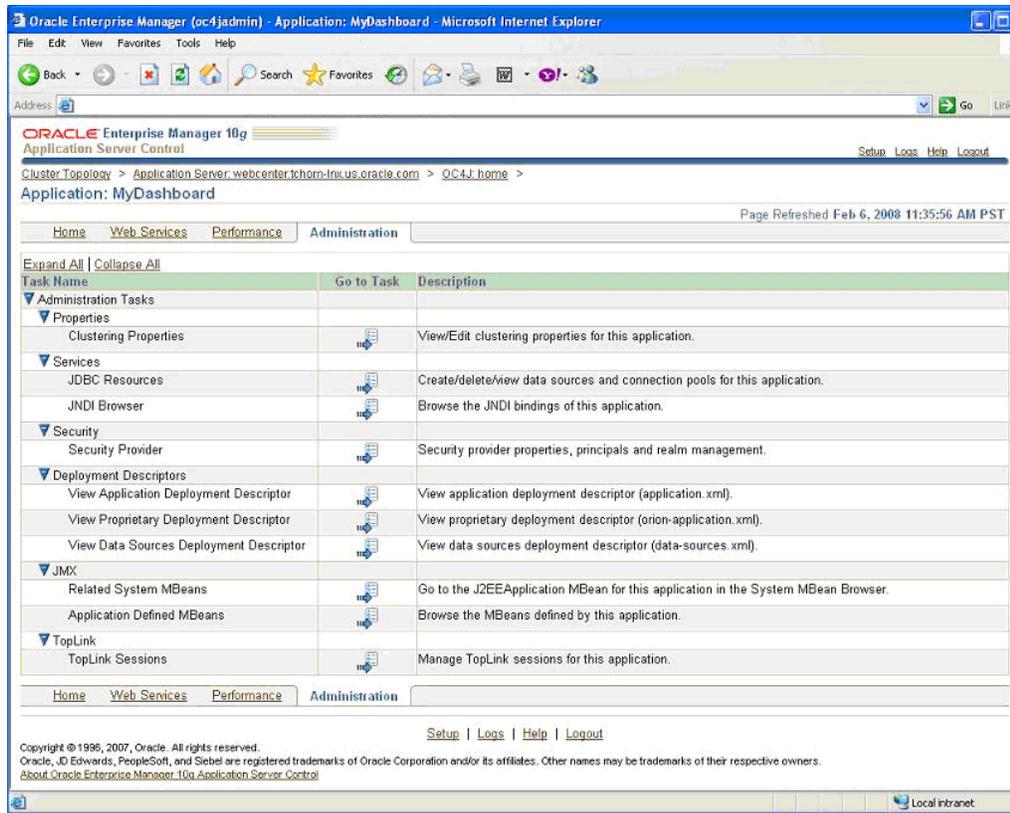
<orion-application xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xsi:noNamespaceSchemaLocation="http://xmlns.oracle.com/oracleas/schema/orion-application-10_0.xsd" deployment-version="10.1.3.1.1"
default-data-source="jdbc/OracleDS" component-classification="external"
schema-major-version="10" schema-minor-version="0" >
  <web-module id="yourDashboardName" path="yourDashboardName.war" />
  <persistence path="persistence" />
  <library path="./adf" />
  <jazn provider="LDAP" >
    <jazn-web-app auth-method="SSO" />
  </jazn>
  <log>
    <file path="application.log" />
  </log>
</orion-application>
```

Where *yourDashboardName* is the name of the dashboard.

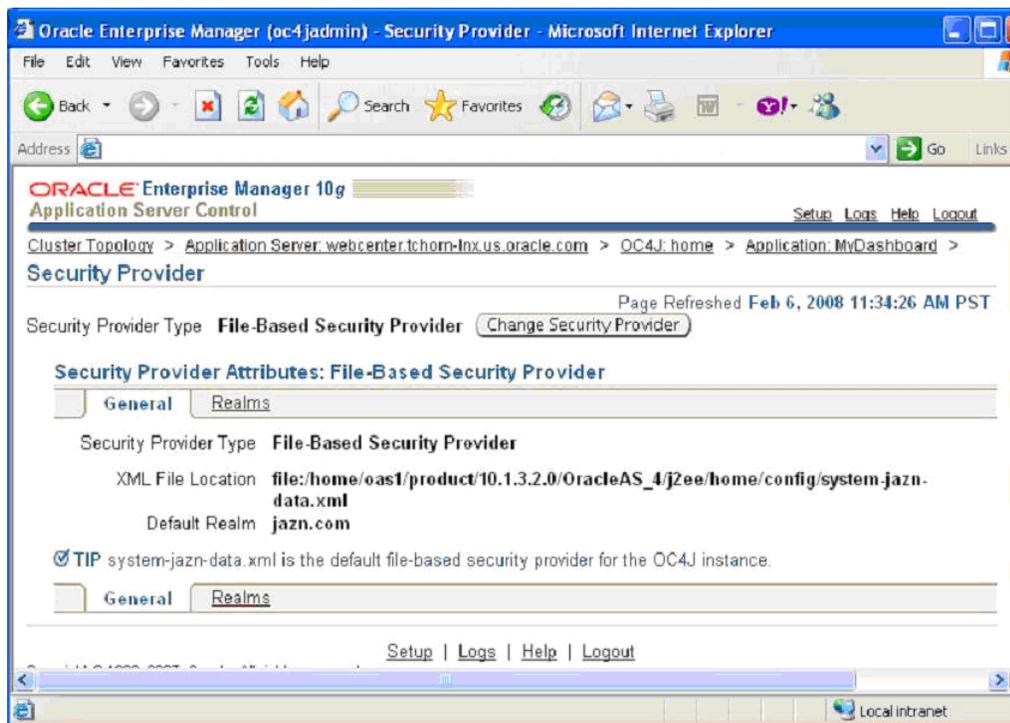
### Option 2: Changing the Security Provider During or After Deployment

After the targeted EAR has been deployed, you can switch to the Oracle Identity Management security provider during the deployment process.

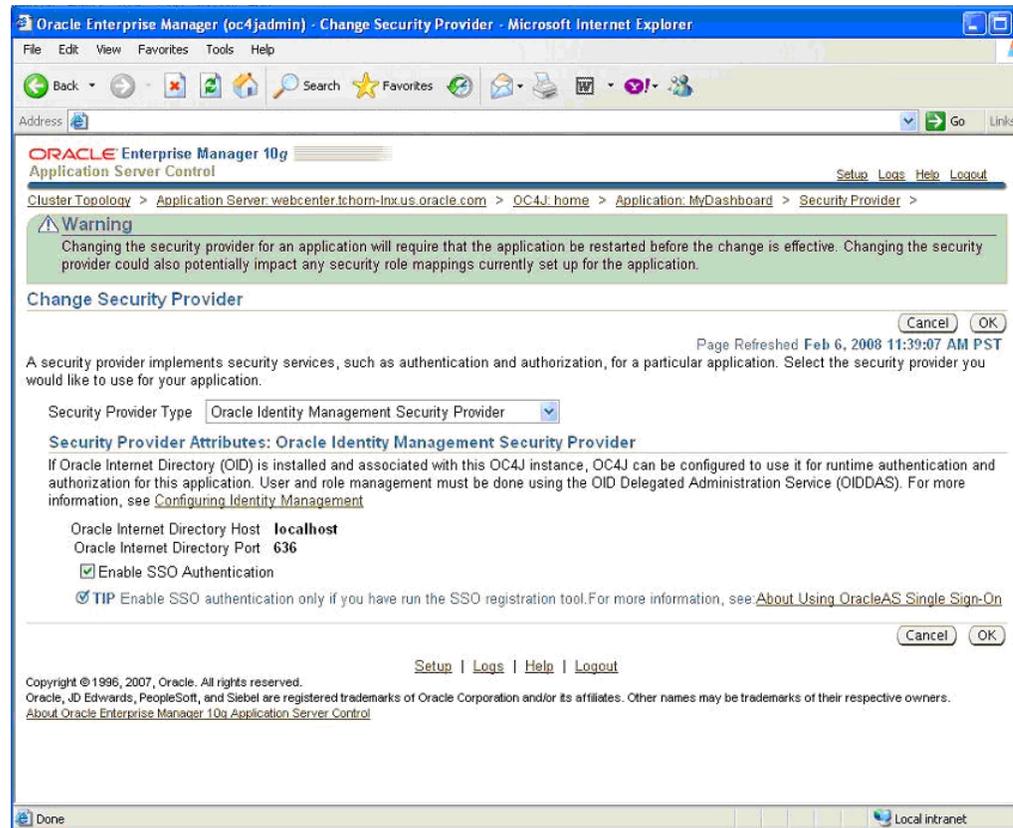
1. Using the Enterprise Manager, select the dashboard application. Then select the **Administration** tab. A window similar to the following figure should appear:



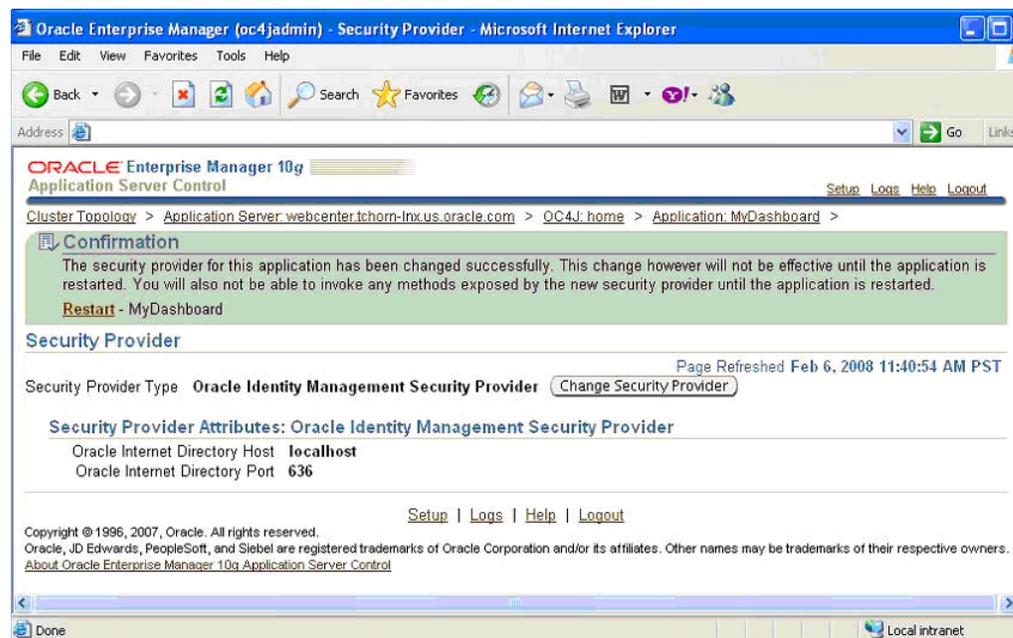
2. In the Security Provider row, select **Go to Task**. The following window appears:



3. Click **Change Security Provider**. In the new window, select **Oracle Identity Management Security Provider** from the Security Provider Type menu. Click **Enable SSO Authentication** to ensure the application will leverage OSSO for authentication purposes.



4. Click **OK**. You are returned to the previous window, with a confirmation message:



5. Click **Restart** in the confirmation message. In the next window that appears, confirm in order for the application to use OSSO.

### Additional Considerations

Once a secure dashboard has been deployed, referenced roles and to these roles must also exist in the associated OID LDAP. Otherwise, it is a secure application that nobody is allowed to access.

Creating users and roles is documented in the Delegated Administrative Services (DAS) application. In DAS, a Group with public visibility is basically the same as a role. Hence, any role referenced in the deployment descriptors of the dashboard must also be created in the OID LDAP server.

Creating within the LDAP is a little more difficult. The easiest way to do this is to use the ORW Permissions Management screen available to administrators. See "[Create via the Permissions Management Administration Tool](#)". The user creating the permissions must have the correct permissions to do so within the LDAP security framework. Typically, this means the user ID is a member of the IAS administrator group or the JAZN administrators group.

There are other options for creating the required :

- Generate an LDIF script using the JAZN migration tool. See the *ADF Development Guide*.
- Use the OC4J jaznadmin command. See the *OAS Administrators Guide*.

## Adding your Dashboard to ORW

If your LocalOC4J deployed dashboard is not accessible to the ORW application, it is recommended that you deploy your dashboard to an OC4J that you can access from ORW.

In order for the dashboard to be accessible from within ORW, it needs to be configured in the `retail-workspace-page-config.xml` file. One purpose of this file is to define all of the entries in the navigation panel of the ORW application. This file can be found at

```
$ORACLE_HOME/j2ee/<oc4j-instance>/RetailWorkspace/  
retail-workspace-page-config.xml
```

Where `<oc4j-instance>` is the name of the OC4J instance where ORW is deployed.

The `retail-workspace-page-config.xml` file is a hierarchical file containing work lists and work items. A work list contains one or more work items and each work item may contain additional work items. Work items may be defined via the `<work-item>` element, or via the `<secure-work-item>` element.

Before a user can see a `<secure-work-item>` in the navigation pane, a permission grant must be created that allows the user access. are typically made to roles or OID Groups and not specific users. for `<secure-work-item>` elements use the `oracle.retail.portal.security.permission.WorkElementPermission` class. However, for `<work-item>` elements, no are needed to see a link to the item in the ORW navigation pane.

Furthermore, if a dashboard has been made secure, another permission grant must be made for the user to actually view the dashboard because users may attempt to view the dashboard outside of the ORW application. ADF uses another permission class, `oracle.adf.share.security.authorization.RegionPermission`, that must be used to grant permission to actually view a secured dashboard.

An example of an unsecured work item is shown below:

```
<work-item id="MyDashboard"
    display-string="MyDashboard"
    rendered="true"
    launchable="true"
    show-in-content-area="true"
    target-frame="_iframe" >

<url>http://myHost.myDomain.com/MyDashboard/faces/MyDashboard.jsp</url>
</work-item>
```

There are a couple of things to note about this entry:

- Externally deployed dashboards use the target-frame of **\_iframe**. This attribute specifies that the dashboard will be rendered within an iframe.
- The show-in-content-area is set to true, which means the dashboard will be rendered in the central content area of the ORW application. No more than one dashboard is displayed at a time within the content area.
- Any user will be able to access this work item, including those that have not been authenticated, as long as they have permission to view the work item's parents.

An example of a secured work item is shown below:

```
<secure-work-item id="MyDashboard"
    display-string="MyDashboard"
    rendered="true"
    launchable="true"
    show-in-content-area="true"
    target-frame="_iframe" >

<url>http://myHost.myDomain.com/MyDashboard/faces/MyDashboard.jsp</url>
<custom-attributes>
<custom-attribute name="adf-permission-target">
<value>myproject.view.pageDefs.MyDashboardPageDef</value>
</custom-attribute>
</custom-attributes>
</secure-work-item>
```

This entry is basically the same as the unsecured work item, except for the element name (secure-work-item) and the <custom-attribute> element named adf-permission-target which is used to secure the work item. However, when ORW processes the retail-workspace-page-config.xml file, the node in the navigation pane that represents this secure work item will only be displayed to the user if the user, or the roles that the user is a member of, have been granted permission via a WorkElementPermission grant.

The ID attribute (id="MyDashboard") must be configured in the <secure-work-item> and must be unique within the file. The Permissions Management tool uses the ID attribute to assign retail workspace permissions. The work item ID attribute is also used when assigning home pages to roles. For more information refer to ORW documentation.

The purpose of the adf-permission-target custom attribute element is to flag to the Permissions Management tool that this is a secured ADF page and an ADF permission grant must be specified to control access to this page. The "<value>" element of the adf-permission-target custom attribute specifies the permission grant target, which must be the JSPX page's associated page definition file specification. To determine the correct value to configure for adf-permission-target, open the dashboard page

definition file in JDeveloper. The value to use in the <value> element is found via a concatenation of the Package and id attributes in the root element of the page definition.

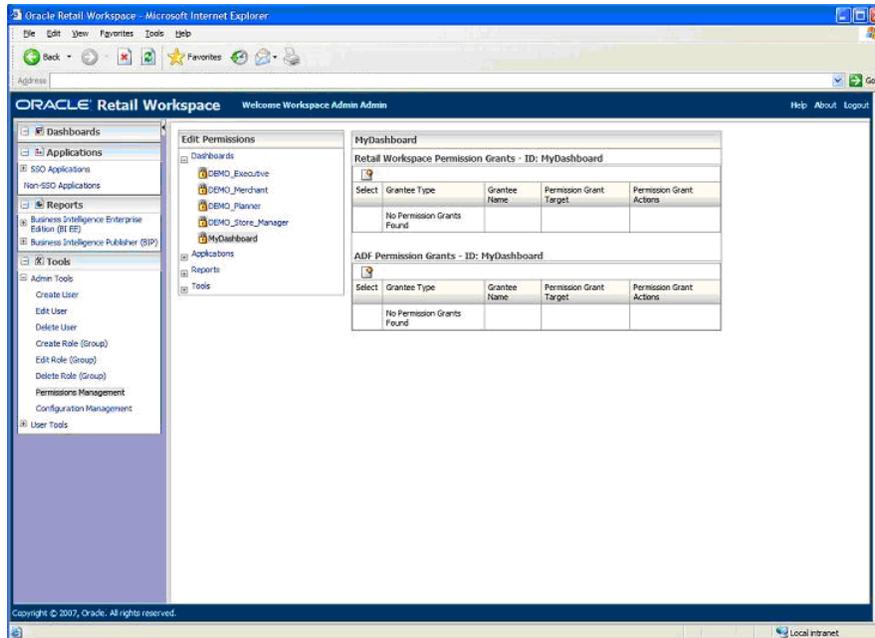
```
<pageDefinition xmlns="http://xmlns.oracle.com/adfm/uimodel"
    version="10.1.3.41.57" id="myDashboardPageDef"
    Package="myproject.view.pageDefs">
```

Once the secure work item has been defined in the retail-workspace-page-config.xml file, an administrator can then create in the OID LDAP via the Permissions Management administration tool found in the ORW application.

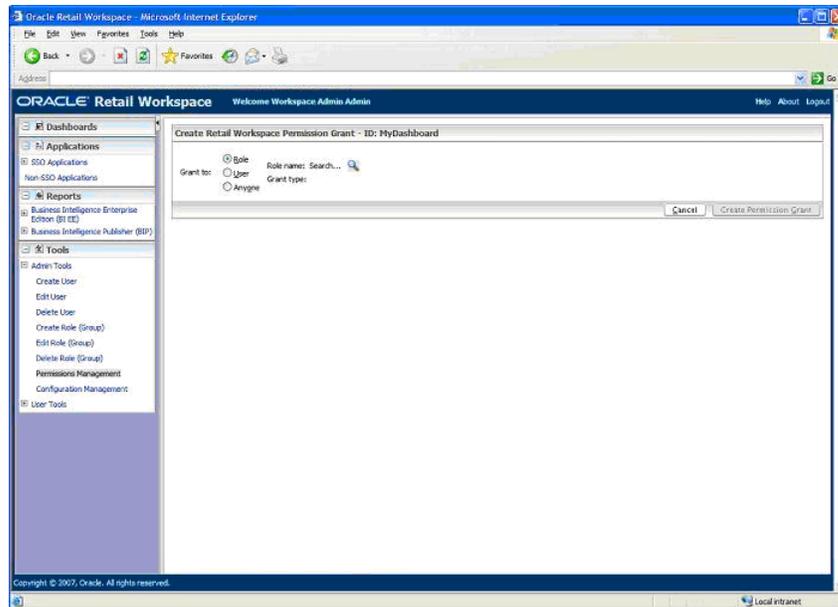
## Create via the Permissions Management Administration Tool

ORW has a number of tools available to administrators. One of these tools is the Permissions Management page. This page is used to manage all <secure-work-item> elements in the retail-workspace-page-config.xml file. Of course, in order to access this tool one must have the correct permissions.

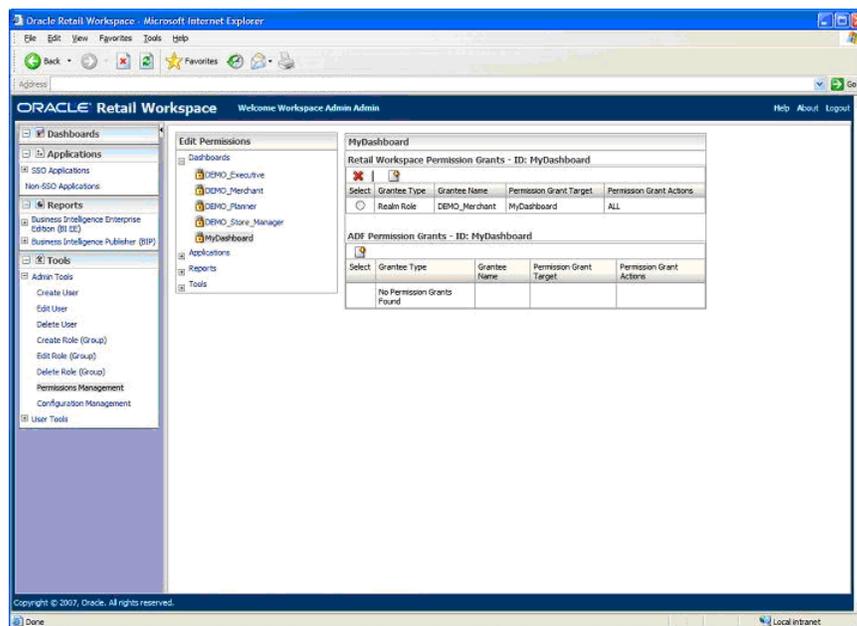
The following figure shows what an entry looks like for a secure dashboard defined in the retail-workspace-page-config.xml file with no existing .ORW grant access to view links to the dashboard via the left navigation pane. The ADF are needed because a user may attempt to access the dashboard outside of the ORW application, for example by typing in the dashboard URL directly into a browser. The ADF infrastructure checks for these on secured pages regardless of how the page was accessed. Typically, one would grant the same access to the same groups or users. A major exception to this rule is for dashboards implemented as subviews.



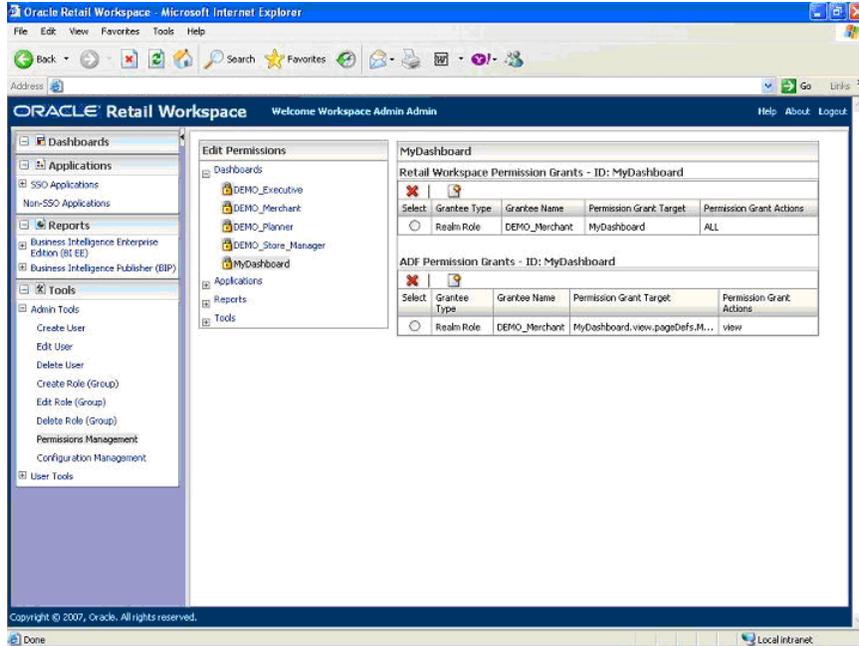
1. Select the MyDashboard node in the Dashboards sub-tree of the Edit Permissions panel.
2. To create a new grant, click **New Grant** above the Select column. The following page appears:



3. Choose the type of Grantees. In most cases, you create a grant to a specific role.
4. Click **Search** to specify the specific Realm Role. This brings up a DAS dialog.
5. Select the role allowed access to MyDashboard. Once the role has been selected, control is returned to this page and **Create Permission Grant** is enabled.
6. Click **Create Permission Grant** to create the Permission Grant in the OID LDAP server and return to the main Permissions Management page.

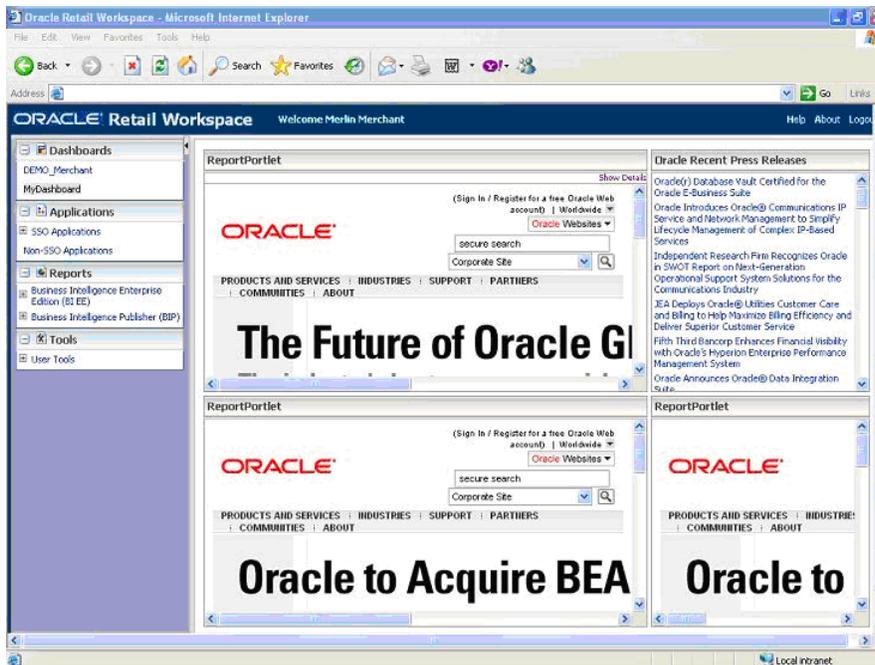


7. Follow this process for both the Workspace and ADF permission grant types.



For more information on how to use the Permission Management tool refer to ORW documentation.

8. Run the ORW application.
9. Log in as a user assigned to the role that has been given permission to view and access MyDashboard . Click on the **MyDashboard** link in the navigation pane on the left. If the work item and permissions have been configured correctly, MyDashboard appears in the navigation pane, and the dashboard appears in the content area when the tree node for the work item is clicked.



## Passing Parameters to a Dashboard

In previous lessons, when you created your dashboard, you hard-coded the value of several portlet parameter variables in the page definition file. You also hard-coded portlet attributes in the dashboard's JSPX file. In this lesson you will learn:

- How to change the **retail-workspace-page-config.xml** to pass parameters to the dashboard as a query string in the dashboard URL
- How to change the dashboard page definition file to use EL expressions to retrieve query string parameters, and use those parameter values to set the DefaultValue of portlet parameters
- How to change the dashboard JSPX page to use EL expressions to retrieve query string parameters and use those parameter values to set the text attribute of the adfp:portlet tags.

---



---

**Note:** If you do not intend to pass URL query string parameter values to the dashboard, you may skip this lesson.

---



---

## Convert Portlet Page Definition Parameter Variables

In previous lessons, the values for portlet parameter variables were hardcoded in the `pageDef.xml`. It is possible to use JSF value binding expressions to dynamically retrieve a value from a message bundle, a JSF managed bean, or an EL implicit object. One such implicit object is the **param** object, which retrieves a request parameter by name.

In the following steps, you will modify the MyDashboard page definition file to replace hard-coded variable values with EL expressions that retrieve the value dynamically from request parameters.

It is highly recommended you perform the parameterizing process on one portlet and one parameter at a time.

---



---

**Note:** The Internet Explorer browser has a roughly 2K limit for URLs. Passing too many parameters to the dashboard will cause the combined URL (the URL to the page plus parameters) to exceed the limit. If the 2K limit is exceeded, the content area of the page will go blank and will remain blank when you click on the dashboard link in the navigation pane.

---



---

1. Right-click on the MyDashboard.jspx page in the Application Navigation pane and click **Go to Page Definition**.
2. In the Structure pane of the page definition file, expand **executables** and then **variables**.
3. To parameterize a variable, change the DefaultValue in the Property Inspector to an immediate EL expression (that is, an EL expression beginning with "\$") that references a parameter by name using the EL implicit param object. Deferred EL expressions (EL expressions beginning with "#") may also be used in the page definition file.

For example, for the top report portlet **URL\_TO\_SHOW** parameter variable, change the DefaultValue from `http://www.oracle.com` to `${param.TOP_REPORT_URL_TO_SHOW}`.

---



---

**Note:** To locate the **variable** element associated with the URL\_TO\_SHOW parameter, first find the **parameter** element with the name equal to URL\_TO\_SHOW in the page definition file. The **pageVariable** attribute of the element specifies the **variable** element by name.

---



---

The **TOP\_REPORT\_URL\_TO\_SHOW** is a parameter that will be set in the retail-workspace-page-config.xml file in the steps that follow.

---



---

**Note:** Make sure there are no trailing spaces after the parameter.

---



---

The Top report Portlet also has an alternate URL link that should be parameterized after you parameterize the URL\_TO\_SHOW variable. Additionally, if you intend to change the default text for ALT\_URL\_LABEL you may also want to parameterize that parameter.

4. Modify the ORW configuration file to add the TOP\_REPORT\_URL\_TO\_SHOW parameter to MyDashboard's secure-work-item. This parameter will be passed as a query string parameter in the dashboard URL.

```

</secure-work-item>
<secure-work-item id="MyDashboard"
    display-string="MyDashboard"
    rendered="true"
    launchable="true"
    show-in-content-area="true"
    target-frame="_iframe" >
<url>http://<yourHost>:<port>/MyDashboard/faces/MyDashboard.jspx</url>
<parameters>
    <parameter name="TOP_REPORT_URL_TO_SHOW">
        <value>http://www.oracle.com</value>
    </parameter>
    <parameter name="TOP_REPORT_ALT_URL">
        <value>http://www.oracle.com</value>
    </parameter>
</parameters>
<custom-attributes>
    <custom-attribute name="adf-permission-target">
        <value>MyDashboard.view.pageDefs.MyDashboardPageDef</value>
    </custom-attribute>
</custom-attributes>
</secure-work-item>

```

Note that if your URL link contains special characters like:

```
http://<host>:<port>/analytics/saw.dll?Go&Path=/shared/Paint Demo/Standard Reports/Geographic Sales Summaries/Share of District Sales
```

The value in the config file should be specified in a CDATA block, for example:

```

<value><![CDATA[http://<host>:<port>/analytics/saw.dll?Go&Path=/shared/Paint Demo/Standard Reports/Geographic Sales Summaries/Share of District Sales]]></value>

```

The screenshot shows the Oracle JDeveloper IDE with the following components:

- Run Manager:** Shows the project structure for MyDashboard, including ViewController and MyDashboardPageDef.xml.
- Structure View:** Displays the XML structure of MyDashboardPageDef, showing a 'variables' section with various portlet parameters.
- Code Editor:** Contains the XML code for MyDashboardPageDef.xml, including a page definition and a variable iterator for variables.
- Messages:** Shows deployment logs for Feb 7, 2008, indicating successful deployment and portlet metadata export.

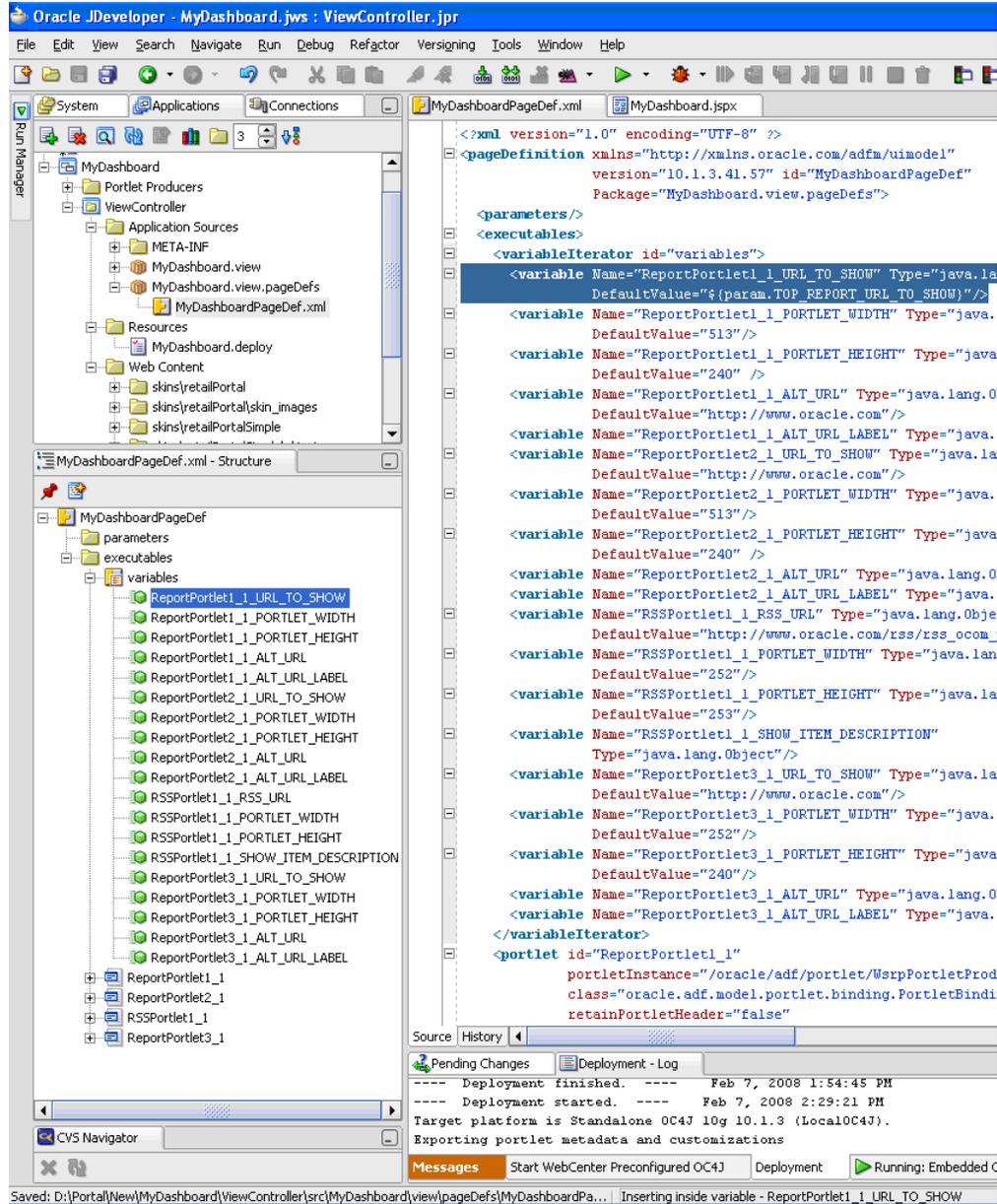
**XML Code in Code Editor:**

```
<?xml version="1.0" encoding="UTF-8" ?>
<pageDefinition xmlns="http://xmlns.oracle.com/adfm/uismodel"
version="10.1.3.41.57" id="MyDashboardPageDef"
Package="MyDashboard.view.pageDefs">
  <parameters/>
  <executables>
    <variableIterator id="variables">
      <variable Name="ReportPortlet1_1_URL_TO_SHOW" Type="java.
DefaultValue="http://www.oracle.com"/>
      <variable Name="ReportPortlet1_1_PORTLET_WIDTH" Type="jav
DefaultValue="513"/>
      <variable Name="ReportPortlet1_1_PORTLET_HEIGHT" Type="ja
DefaultValue="240"/>
      <variable Name="ReportPortlet1_1_ALT_URL" Type="java.lang
DefaultValue="http://www.oracle.com"/>
      <variable Name="ReportPortlet1_1_ALT_URL_LABEL" Type="jav
      <variable Name="ReportPortlet2_1_URL_TO_SHOW" Type="java.
DefaultValue="http://www.oracle.com"/>
      <variable Name="ReportPortlet2_1_PORTLET_WIDTH" Type="jav
DefaultValue="513"/>
      <variable Name="ReportPortlet2_1_PORTLET_HEIGHT" Type="ja
DefaultValue="240"/>
      <variable Name="ReportPortlet2_1_ALT_URL" Type="java.lang
      <variable Name="ReportPortlet2_1_ALT_URL_LABEL" Type="jav
      <variable Name="RSSPortlet1_1_RSS_URL" Type="java.lang.Ob
DefaultValue="http://www.oracle.com/rss/rss_oco
      <variable Name="RSSPortlet1_1_PORTLET_WIDTH" Type="java.1
DefaultValue="252"/>
      <variable Name="RSSPortlet1_1_PORTLET_HEIGHT" Type="java.
DefaultValue="253"/>
      <variable Name="RSSPortlet1_1_SHOW_ITEM_DESCRIPTION"
Type="java.lang.Object"/>
      <variable Name="ReportPortlet3_1_URL_TO_SHOW" Type="java.
DefaultValue="http://www.oracle.com"/>
      <variable Name="ReportPortlet3_1_PORTLET_WIDTH" Type="jav
DefaultValue="252"/>
      <variable Name="ReportPortlet3_1_PORTLET_HEIGHT" Type="ja
DefaultValue="240"/>
      <variable Name="ReportPortlet3_1_ALT_URL" Type="java.lang
      <variable Name="ReportPortlet3_1_ALT_URL_LABEL" Type="jav
    </variableIterator>
    <portlet id="ReportPortlet1_1"
portletInstance="/oracle/adf/portlet/WsrpPortletPr
class="oracle.adf.model.portlet.binding.PortletBin
retainPortletHeader="false"
```

**Messages:**

```
Pending Changes | Deployment - Log
---- Deployment finished. ---- Feb 7, 2008 1:54:45 PM
---- Deployment started. ---- Feb 7, 2008 2:29:21 PM
Target platform is Standalone OC4J 10g 10.1.3 (LocalOC4J).
Exporting portlet metadata and customizations
Messages Start WebCenter Preconfigured OC4J Deployment Running: Embedde
```

**Bottom Status Bar:** D:\Portal\New\MyDashboard\ViewController\src\MyDashboard\view\pageDefs\MyDashboardPageDef.xml | Inserting inside variable - ReportPortlet1\_1\_URL\_TO\_SHOW



## Convert Portlet text Attribute Value

In previous lessons, the portlet title was set by hard-coding the **text** attribute of the portlet. In the following steps you will modify `MyDashboard.jspx` to replace the hard-coded **text** attribute with an EL expression that retrieves the value dynamically from a managed bean.

---

**Note:** Before portlet title values are parameterized, you need to include the `oretail-common.jar` in the `ViewController\public_html\WEB-INF\lib` directory. The `oretail-common.jar` is shipped with the `orw-dashboards-devpack.zip` contained within the `RetailWorkspaceApplication.zip`. The `oretail-common.jar` file was extracted earlier in this tutorial. For additional information, see ["Adding Oracle Retail Skins to your Dashboard"](#). The `oretail-common.jar` contains `DecodeRequestParamBean` that makes sure that the character encoding for Portlet Titles is correctly decoded as UTF-8.

---

1. Change `faces-config.xml` found under `ViewController\public_html\WEB-INF` to declare the `decodeParam` bean:

```
<managed-bean>
    <managed-bean-name>decodeParam</managed-bean-name>

    <managed-bean-class>oracle.retail.common.faces.bean.DecodeRequestParamBean</managed-bean-class>
    <managed-bean-scope>request</managed-bean-scope>
    <managed-property>
        <property-name>encoding</property-name>
        <value>UTF-8</value>
    </managed-property>
</managed-bean>
```

For more information about the `DecodeRequestParamBean` refer to Oracle Retail Workspace documentation.

2. In the structure pane of the `jspx` page, select the `adfp:portlet` tag.
3. Right-click and select Properties from the context menu.
4. In the Portlet Properties dialog, locate the "text" property in the common properties tab and click **Bind**.
5. Enter the following in the Expression field:

```
#{decodeParam.<parameter name>}
```

For example if the portlet is for the Top Report Portlet name this parameter `TOP_REPORT_TITLE`. So in the Expression field, enter `#{decodeParam.TOP_REPORT_TITLE}`

6. Add this parameter to the `MyDashboard` `secure-work-item` in the ORW configuration file.

Example:

```
<parameter name="TOP_REPORT_TITLE">
<value>Welcome to Oracle</value>
</parameter>
```

7. Re-deploy the dashboard and bring it up in ORW.

---

**Note:** The value specified for the portlet title may be an EL expression that retrieves a string from a resource bundle. For more details, see ["Internationalizing a Dashboard"](#).

---

## References

WebCenter documentation can be accessed at:

<http://www.oracle.com/technology/products/webcenter/documentation.html>

## Internationalizing a Dashboard

This section will cover the following topics:

- How to internationalize a dashboard.
  - How to internationalize strings within the dashboard application.
  - How to internationalize dashboard work item display strings and parameters in the ORW page configuration file.

In this lesson, you will perform the following steps:

- Configure the dashboard application to support locales.
- Internationalize the dashboard application. This is optional.
  - Create a resource bundle in the dashboard application. This is optional.
  - Internationalize the dashboard page. This is optional.
- Internationalize the dashboard within the ORW application.
  - Create a dashboard resource bundle for use in the ORW configuration file.
  - Modify the ORW configuration file to reference strings from the dashboard resource bundle.

## Configure the Supported Locales for the Dashboard Application

ORW uses the browser locale to determine which language to use. Since the dashboard is a JSF application, you will configure the languages you intend to support in the application `faces-config.xml` file. JSF reads the `Accept-Language` value of the HTTP header and then finds the best match from the supported locales for the application.

1. In the Applications Navigator, expand the `ViewController` project of the `MyDashboard` application. Expand the `Web Content` folder. Expand the `WEB-INF` sub-folder. Double-click `faces-config.xml` to open the file in an editor pane.
2. Register the locales you intend to support with the application. To do this, modify the `faces-config.xml` file to add `<supported-locale>` elements inside the `<locale-config>` element for each locale you wish to support. The `<locale-config>` element is a child of the `<application>` element.

The following example configures the locales that the browser application supports. This list is similar to the list of locales that ORW supports.

```
<locale-config>
  <default-locale>en</default-locale>
  <supported-locale>en_AU</supported-locale>
  <supported-locale>de</supported-locale>
  <supported-locale>fr</supported-locale>
  <supported-locale>es</supported-locale>
  <supported-locale>ja</supported-locale>
  <supported-locale>ko</supported-locale>
  <supported-locale>ru</supported-locale>
  <supported-locale>zh_TW</supported-locale>
```

```

<supported-locale>zh_CN</supported-locale>
<supported-locale>pt</supported-locale>
<supported-locale>it</supported-locale>
</locale-config>

```

## Internationalizing your Dashboard Application

In previous sections, you created a dashboard that consists of Reports Portlets and RSS Feed Portlets. It is also possible to add other portlets such as the URL Portlet to your dashboard.

In the case of the Report and URL Portlets, the one string that you will typically internationalize is the Report/URL Portlet title. Additionally, if you configured the `ALT_URL_LABEL` parameter of the ReportPortlet or the URLPortlet, then you may also wish to internationalize the parameter value.

---

**Note:** If you have configured ORW and the dashboard to pass the portlet title and other string variables into the dashboard as URL parameters, you should skip this section and proceed to the steps for internationalizing dashboard strings within the ORW configuration file.

---

### Create a Resource Bundle for the Dashboard Application

In the following steps, you will create a base resource bundle that contains the MyDashboard text strings.

1. In the Application Navigator, right-click on **ViewController** and click **New** to open the New Gallery.
2. In the Categories tree, select **Simple Files**, and in the Items list, select **File**.
3. In the Create File dialog, enter a name for the file, using the `.properties` extension. For this example, name it `MyDashboardMessages.properties`. We want this bundle to be in a `com.mycompany.i18n` package, and we want all bundles in a `bundles` directory. Append `\bundles\com\mycompany\i18n` to the directory name. This path is relative to your dashboard application's `ViewController` directory. Click **OK** to create and open the `MyDashboardMessages.properties` file.

---

**Note:** When you create a localized version of the base resource bundle, it must reside in the same Java package, that is, the same directory as the base file.

---

4. It is important that you add the **bundles** directory that you just created to the classpath.
  - a. Select **ViewController** in the Applications Navigator.
  - b. Right-click and select **Properties** from the context menu.
  - c. In the Java Content pane, click **Add**.
  - d. In the Project Properties dialog, select **Project Content**.
  - e. In the Choose Directory dialog, locate the `bundles` directory below your workspace `ViewController` directory. Double-click on the `bundles` directory to select it and close the dialog. The `bundles` directory should now be a new item in the Java Content list.

- f. To close the Project Properties dialog, click **OK**.
5. Edit `MyDashboardMessages.properties` to include a key/value pair for each string you plan to internationalize (you may add more strings later as needed). For this example enter the following title for the top report to `MyDashboardMessages.properties`:

```
topReportTitle=Welcome to Oracle
```

## Internationalize the Dashboard Page

1. Open `MyDashboard.jspx`.
2. Set your page encoding and response encoding to an encoding that is appropriate for all languages that the dashboard will support. In previous chapters, we recommended setting encoding and charset to "UTF-8".

If no encoding is set, the page encoding defaults to the value of the response encoding set using the `contentType` attribute of the page directive.

Example: Page and Response Encoding shows the encoding for the `MyDashboard.jspx` page:

```
<?xml version='1.0' encoding='UTF-8'?>
<jsp:root xmlns:jsp="http://java.sun.com/JSP/Page" version="2.0"
  xmlns:h="http://java.sun.com/jsf/html"
  xmlns:f="http://java.sun.com/jsf/core"
  xmlns:af="http://xmlns.oracle.com/adf/faces"
  xmlns:afh="http://xmlns.oracle.com/adf/faces/html"
  xmlns:adfp="http://xmlns.oracle.com/adf/faces/portlet"
  xmlns:cust="http://xmlns.oracle.com/adf/faces/customizable">
  <jsp:output omit-xml-declaration="true" doctype-root-element="HTML"
    doctype-system="http://www.w3.org/TR/html4/loose.dtd"
    doctype-public="-//W3C//DTD HTML 4.01 Transitional//EN"/>
  <jsp:directive.page contentType="text/html;charset=UTF-8"/>
```

3. Load the base resource bundle onto the page using the `loadBundle` tag, as shown below.

```
<f:loadBundle basename="com.mycompany.i18n.MyDashboardMessages"
  var="res"/>
```

For this example, insert the `loadBundle` tag before the **head** tag.

The `basename` attribute specifies the fully qualified name of the resource bundle to be loaded. This resource bundle should be the one created for the default language of the application. The `var` attribute specifies the name of a request scope attribute under which the resource bundle will be exposed as a `Map`. The `var` attribute will be used in the EL expressions that bind component attributes to a key in the resource bundle. In this example, the resource bundle will be exposed as keys under the `res` variable.

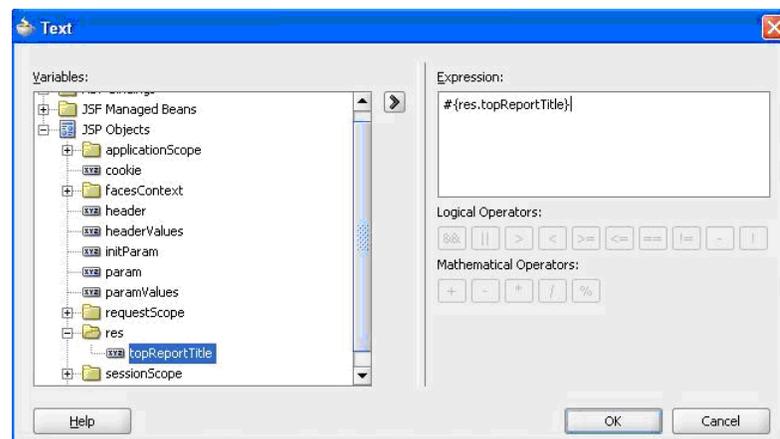
You need to load only the base resource bundle on the page. The application will automatically use the correct bundle for other locales based on the user's browser locale setting.

---

**Note:** If JDeveloper reports an error for the loadBundle tag, that indicates that the specified basename is not a Resource Bundle, property file, or expression. Make sure that you add the bundles directory to the project properties classpath. See "[Internationalizing your Dashboard Application](#)".

---

4. With MyDashboard.jspx open and selected in the editor pane, select the adfp:portlet tag that you wish to internationalize in the MyDashboard.jspx structure pane. For this example, select the top report portlet.
5. Right click and select **Properties** from the context menu.
6. Navigate to the **Text** property and click **Bind** on the menu.
7. In the Bind to Data dialog Variables pane, expand JSP Objects. Expand the **res** variable and select **topReportTitle**. Click the right arrow to move the resulting EL expression to the Expression box. Click **OK** to confirm the binding.



This inserts the `#{res.topReportTitle}` EL expression in the text property of the top report portlet's `adfp:portlet` tag.

8. Repeat steps 4 through 7 for each report or URL portlet, specifying the appropriate resource bundle key for each portlet title.

## Internationalizing your Dashboard within ORW

In the following steps, you will learn how to internationalize dashboard strings that are configured within the ORW configuration file.

You will learn how to internationalize the work item display-string attribute for your dashboard. Also, if you have configured ORW and the dashboard to pass the portlet title and other string variables into the dashboard as URL parameters, you will learn how to internationalize those parameters.

### Create a Dashboard Resource Bundle for Use in the ORW Configuration

In the following steps, you will create a base resource bundle that contains text strings for the MyDashboard application that will be used in the ORW application. Later this new resource bundle will be transferred to the application server where the ORW is deployed.

You will start by adding a new project to your application. You will use this project to keep the resource bundle distinct from resource bundles loaded by `MyDashboard.jspx`.

1. In the Application Navigator, right-click on the `MyDashboard` application and choose **New Project** to open the New Gallery. Projects should be selected under General in the Categories tree.
2. In the Items list, select **Empty Project**. Click **OK**.
3. In the Create Project dialog, enter a name for your project. Call this project `WorkspaceI18n`. JDeveloper will provide a suitable default for the directory name. Click **OK** to create the new project.
4. In the Application Navigator, right-click on the `WorkspaceI18n` project that you just created. Select **New** in the context menu.
5. In the Categories tree, select **Simple Files**, and in the Items list, select **File**.
6. Enter a name for the file, using the `.properties` extension. For this example enter the name `MyDashboardMessages.properties`.

You want this bundle to be in the `com.mycompany.workspace.i18n` package, so append `\com\mycompany\workspace\i18n` to the directory name. This path is relative to the `WorkspaceI18n` directory of your dashboard application.

---

---

**Note:** When you create localized versions of the base resource bundle, these must reside in the same Java package, that is, the same directory as the base file.

---

---

Although you are giving this resource bundle the same name as the one created in the previous section, this resource bundle will be used by the ORW application.

Click **OK** to create and open the `MyDashboardMessages.properties` file.

7. Add strings to this new resource bundle. These strings will be used later to internationalize the dashboard work item display-string and optional string parameters that will be passed to the dashboard.

First, add a `myDashboard` key and its default value to `com.mycompany.workspace.i18n.MyDashboardMessages.properties`:

```
myDashboard=This is MyDashboard
```

This string will be used as the work item display string for the dashboard. This string will be displayed in the ORW navigation pane, in the dashboard work list.

If you have configured your dashboard to read the `TOP_REPORT_TITLE` query string parameter to get the value for the top report title, you must also add a `topReportTitle` key and its default value to `com.mycompany.workspace.i18n.MyDashboardMessages.properties`:

```
topReportTitle>Welcome to Oracle
```

Note that the `topReportTitle` key is not required if you did not configure your dashboard to read the `TOP_REPORT_TITLE` query string parameter.

8. At this point, you have created a resource bundle with the necessary strings to internationalize the dashboard. Now you need to copy the resource bundle to a directory that is in the classpath of the ORW application. To complete this part of the tutorial, you must also have access to the `RetailWorkspace\lang_packs` directory where the ORW application is installed:

`$ORACLE_HOME\j2ee\<instance name>\RetailWorkspace\lang_packs\`

Choose one of the following two options for placing the messages file in `RetailWorkspace\lang_packs`:

- Below the `lang_packs` directory, create a directory structure that matches the package name of the resource bundle, that is, `com\mycompany\workspace\i18n`. Copy `MyDashboardMessages.properties` to the newly created `i18n` directory.
- Package the resource bundle files in a jar file, maintaining the `com\mycompany\workspace\i18n` directory structure within the jar file. Copy this jar file to the `lang_packs` directory.

---

**Note:** To localize the dashboard, you must create versions of `MyDashboardMessages.properties` for each locale you support.

For example, create a file for each locale named `MyDashboardMessages_xx.properties`, where `xx` is the Java locale ID:

- `MyDashboardMessages_fr.properties` for French
  - `MyDashboardMessages_zh_TW.properties` for Traditional Chinese
- 

After copying the resource bundles to the deployed ORW, you must stop and restart the ORW application.

## Modify the ORW Configuration File to Reference Strings in the Resource Bundles

At this point, the resource bundles with the necessary strings to internationalize and localize the dashboard should have been copied to the `lang_packs` directory of the deployed ORW application. Now you must modify the ORW configuration file to make use of the resource bundles. To complete this part of the tutorial, you must have access to the deployed ORW application configuration file, `retail-workspace-page-config.xml`, which by default is located in `$ORACLE_HOME/j2ee/<instance name>/RetailWorkspace`).

1. In a text editor, open `retail-workspace-page-config.xml`.
2. Add a reference to the base resource bundle. At the top of the `retail-workspace-page-config.xml`, locate the `resource-bundles` parent element. The element will consist of one or more child `resource-bundle` elements, as follows:

```
<resource-bundles>
<!-- READ THE EXPLANATION PROVIDED IN THE FILE -->
<resource-bundle var="exampleMsgs"
resource-bundle="oracle.retail.portal.examples.i18n.Messages"/>
</resource-bundles>
```

To `resource-bundles`, add another child `resource-bundle` element that specifies the resource bundle just created:

```
<resource-bundle var="myDashboardMsgs"
resource-bundle="com.mycompany.workspace.i18n.MyDashboardMessages"/>
```

The `resource-bundle` element loads the messages in the resource bundle specified by the `resource-bundle` attribute into a Map. It then stores the Map with the name specified by the `var` attribute into JSF request scope. This allows

you to use EL expressions to reference strings in the resource bundle within the configuration file.

3. Change the configuration to internationalize the dashboard work item display-string attribute:
  - a. Locate the <secure-work-item> element for the MyDashboard dashboard. You added this work item to the configuration file in a previous section.
  - b. Change the value of the display-string attribute from ="MyDashboard" to "#{myDashboardMsgs.myDashboard}".  
  
#{myDashboardMsgs.myDashboard} is an EL expression that will retrieve the value of the **myDashboard** key from the resource bundle associated with **myDashboardMsgs**, that is, **com.mycompany.workspace.i18n.MyDashboardMessages**. Evaluation of the EL expression occurs at application run time.
4. Change the configuration to internationalize any display parameters you are passing to the dashboard in the URL query string. For example, you will internationalize the top report title:

In the same <secure-work-item> you modified in step 3, locate the parameter named **TOP\_REPORT\_TITLE**. Replace the parameter value with **#{myDashboardMsgs.topReportTitle}**. This is an EL expression that will retrieve the value of the **topReportTitle** key from the resource bundle associated with **myDashboardMsgs**, that is, **com.mycompany.workspace.i18n.MyDashboardMessages**. Evaluation of the EL expression occurs at application run time.

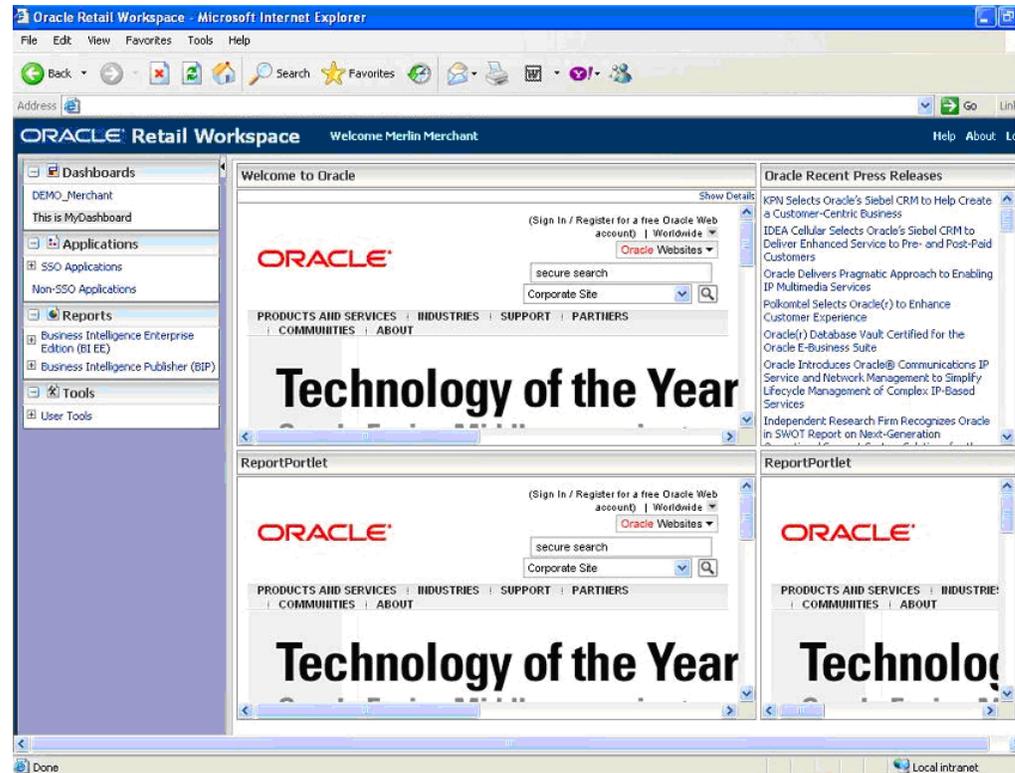
Here is what the configuration looks like before changing the parameter value:

```
<parameter name="TOP_REPORT_TITLE">
<value>Welcome to Oracle</value>
</parameter>
```

After changing the parameter value:

```
<parameter name="TOP_REPORT_TITLE">
<value>#{myDashboardMsgs.topReportTitle}</value>
</parameter>
```

5. To test the changes to the ORW configuration, open up Internet Explorer and enter the URL to the deployed ORW application. Log in as a user who has access to view the dashboard.



## Summary of Configuration Changes

Below are snippets of XML showing how `retail-workspace-page-config.xml` `<resource-bundles>` and `<secure-work-item>` elements might look after making changes for internationalization:

```
<resource-bundles>
...
<resource-bundle var="myDashboardMsgs"
resource-bundle="com.mycompany.workspace.i18n.MyDashboardMessages" />
</resource-bundles>

<secure-work-item id="MyDashboard"
  display-string="#{myDashboardMsgs.myDashboard}"
  rendered="true"
  launchable="true"
  show-in-content-area="true"
  target-frame="_iframe" >
<url>http://mycompany.com:7781/MyDashboard/faces/MyDashboard.jsp</url>
<parameters>
<parameter name="TOP_REPORT_TITLE">
<value>#{myDashboardMsgs.topReportTitle}</value>
</parameter>
<parameter name="TOP_REPORT_URL_TO_SHOW">
<value>http://www.oracle.com</value>
</parameter>
<parameter name="TOP_REPORT_ALT_URL">
<value>http://www.oracle.com</value>
</parameter>
</parameters>
<custom-attributes>
<custom-attribute name="adf-permission-target">
```

```
<value>MyDashboard.view.pageDefs.MyDashboardPageDef</value>  
</custom-attribute>  
</custom-attributes>  
</secure-work-item>
```

---

---

## Troubleshooting

Always refer to the ORW application log whenever an error occurs on the screen. Refer to the Logging chapter of the *ORW Implementation Guide*. Also make sure you are using Internet Explorer 6 and above.

**Problem: LDAP error "User ID not found in LDAP. Please contact your System Administrator" appears after a user has successfully logged in via the SSO login page.**

Possible Solutions:

1. A cause could be bad entries in the `ldap-config.xml` file.
  - Check that the host, port, and SSL specifications are accurate.
  - Verify the application login distinguished name exists within the ldap.
  - Verify the wallet specified in the password-location entry exists and the `ldap-user-pw` alias stores the password for the application login distinguished name.
2. Check the OID LDAP is available.

**Problem: A "403 Forbidden" error appears when user accesses the main ORW page.**

Possible Solutions:

1. The OC4J instance to which ORW is deployed has incorrect entries in the file `$ORACLE_HOME/j2ee/<oc4j_instance>/config/jazn.xml`. Verify this file specifies the security provider as "LDAP" with the correct host, port, and realm values.
2. There is no permission grant made for the main ORW JSPX page. Rerun the `load_ldap_required_data.sh` script.

**Problem: A "403 Forbidden" error appears in the content area when accessing a dashboard.**

Possible Solutions:

1. The OC4J instance where the dashboard is deployed has incorrect entries in the file `$ORACLE_HOME/j2ee/<oc4j_instance>/config/jazn.xml`. Verify this file specifies the security provider as "LDAP" with the correct host, port, and realm values.
2. There is no permission grant made for the dashboard JSPX page. Use the Permissions Management administration tool to create an appropriate ADF Region permission grant.

---

**Problem: "Authorization or Authentication Error" appears when user logs into ORW.**

Possible Solutions:

1. The OC4J instance is not using the OID LDAP as its instance security provider. Verify the file `$ORACLE_HOME/j2ee/<oc4j_instance>/config/jazn.xml` specifies the security provider as "LDAP" with the correct host, port, and realm specifications.
2. The user ID is not a member of the Retail\_Workspace\_Users group nor a member of a group contained in the Retail\_Workspace\_Users group.
3. The user ID belongs to a group that does not have public visibility. Administrators must take care whenever modifying a group used in ORW to set the public visibility to "true". Using the DAS application, verify the group the user belongs to has public visibility.
4. The permission grant for the main ORW page has been deleted from OID. Look in the OID realm independent policy section (cn=Permissions,cn=policy,cn=JAZNContext,cn=Products,cn=OracleContext) for a permission grant with a target of `oracle.retail.portal.view.pageDefs.RetailWorkspacePageDef`.

If none exists, use the scripts found in the ldap sub-directory of the ORW installation home directory. In the `ldap_util.properties` file, set the `execute.ldap.scripts` property to "false" and re-run the script. Using the `ldapadd` command, re-load the made to "anyone" via the LDIF script, `create_anyone_grants.ldif`.

**Problem: A "500 Error" appears when accessing a dashboard.**

Possible Solutions:

1. The dashboard was not deployed correctly. The dashboard EAR was not targeted correctly or the MDS directory is not available on the deployed host. Part of the targeting process is to specify an MDS directory which must be available to the deployed application.
2. The dashboard's URL in `retail-workspace-page-config.xml` is incorrect.

**Problem: Error "The LDAP server will not allow you to perform this operation. Please contact your System Administrator." appears when user clicks on Permission Management link in the Admin Tools worklist.**

Possible Solution:

1. The current user ID does not have permission to perform the desired action. The user ID should be a member of the JAZNAdminGroup for managing permissions. This assignment may have to be performed using the `oidadmin` command found with the Oracle Identity Management Infrastructure server.

**Problem: Error "LDAP: error code 50 - Insufficient Access Rights" appears when an ORW administrator attempts to manage a user in DAS.**

Possible Solution:

1. The current user ID does not have permission to perform the desired action. The user ID should be a member of the appropriate DAS administration group or have been assigned the permission directly within OID. This assignment may have to be performed using the `oidadmin` command found with the Oracle Identity Management Infrastructure server.

---

**Problem: The SSO login screen appears when clicking on a dashboard work list item. The login screen may continue to appear even when a valid user ID and password has been entered.**

Possible Solution:

1. A cause of the problem could be a missing ADF Region Permission grant for the dashboard. Secured ADF pages, such as dashboards require two , a Work Element grant to see the link in the Navigation Panel and an ADF Region permission grant to physically access the page.

As an administrator, verify the `retail-workspace-page-config.xml` entry for the dashboard contains a custom attribute specification similar to the one below:

```
<custom-attributes>
  <custom-attribute name="adf-permission-target">
    <value>{{DASHBOARD_PAGE_DEFINITION_ID}}</value>
  </custom-attribute>
</custom-attributes>
```

where `{{DASHBOARD_PAGE_DEFINITION_ID}}` is the page definition file ID. Typically, this ID is the concatenation of the page definition package and the file name.

Once the custom attribute is correctly placed in the `retail-workspace-page-config.xml` file, log into ORW as an administrator and use the Permissions Management work item to create the permission grant for the dashboard.

**Problem: The Executive Dashboard will not display. An error, "The page could not be loaded for URL:**

**`http://servername:port/context/faces/exampleDashboards/DemoExecutiveDashboard.d.jspx`" appears in the content area.**

Possible Solution:

A cause for this may be the Executive Dashboard is missing an ADF Permission grant made to Anyone.

1. Log in to ORW as an administrator and create an ADF permission grant for the ADF Anyone role.

**Problem: Dashboard does not display in the content area of the ORW screen.**

Possible Solutions:

1. Make sure all servers defined in `retail-workspace-page-config.xml` in URLs, attributes, parameters, etc. are fully qualified (e.g. `server01.mycompany.com` rather than `server01`).
2. Make sure the total length of the dashboard URL does not exceed the browser's limit. To check the URL size:
  - a. Right-click on the ORW screen somewhere other than the content area (e.g. the top of the screen where the logo is).
  - b. Select "View Source" from the context menu.

- 
- c. In the source window find: `src=""` followed by the dashboard's URL (found in the ORW configuration file). Copy the text within the double-quotes and paste it in your favorite text editor where you can perform a character count.

If the count is greater than the Internet explorer's URL length limit, that is the problem. For IE6 the limit is roughly 2000 characters.

The URL should look something like the following:

```
http://servername.company.com:port/MerchantDashboard/faces/DemoMerchantDashboard.jspx?TOP_REPORT_
TITLE=This+Week%27s+Top+Performers&TOP_REPORT_URL_TO_
SHOW=http%3A%2F%2Fservername%3A7777%2Fanalytics%2Fsaaw.dll%3FPortal
Pages%26PortalPath%3D%252Fshared%252FPortal%252F_
portal%252FResizedTop%2BPerformers&TOP_REPORT_ALT_
URL=http%3A%2F%2Fservername%3A7777%2Fanalytics%2Fsaaw.dll%3FPortalPa
ges%26PortalPath%3D%252Fshared%252FPortal%252F_
portal%252FResizedTop%2BPerformers&MIDDLE_REPORT_
TITLE=Open+Purchase+Orders&MIDDLE_REPORT_URL_TO_
SHOW=http%3A%2F%2Fservername%3A7777%2FBIPublisher%2FGuest%2FRMS%
%2F12.1dev%2FOrders%2Fopo_merch_dash%2Fopo_merch_dash.xdo%3F_
xpf%3D%26_xpt%3D0%26_
xdo%3D%252FGuest%252FRMS%252F12.1dev%252FOrders%252Fopo_merch_
dash%252Fopo_merch_dash.xdo%26_
xt%3DOPO%2520Merchant%2520Dashboard%2520Portal%2520Report%26_
xf%3Dhtml%26_xmode%3D4&MIDDLE_REPORT_ALT_
URL=http%3A%2F%2Fservername%3A7777%2FBIPublisher%2FGuest%2FRMS%
%2F12.1dev%2FOrders%2Fopo_merch_dash%2Fopo_merch_dash.xdo%3F_
xpf%3D%26_xpt%3D0%26_
xdo%3D%252FGuest%252FRMS%252F12.1dev%252FOrders%252Fopo_merch_
dash%252Fopo_merch_dash.xdo%26_
xt%3DOPO%2520Merchant%2520Dashboard%2520Portal%2520Report%26_
xf%3Dhtml%26_xmode%3D4&BOTTOM_REPORT_
TITLE=Yesterday%27s+Flash+Sales&BOTTOM_REPORT_URL_TO_
SHOW=http%3A%2F%2Fservername%2Fanalytics%2Fsaaw.dll%3FGo%26Path%3
D%252Fshared%252FPortal%252FYesterday%2527s%2520Flash%2520Sales&B
OTTOM_REPORT_ALT_
URL=http%3A%2F%2Fservername%2Fanalytics%2Fsaaw.dll%3FGo%26Path%3D%
252Fshared%252FPortal%252FYesterday%2527s%2520Flash%2520Sales&TOP_
_RSS_URL=http%3A%2F%2Fwww.oracle.com%2Frss%2Frss_ocom_
pr.xml&MIDDLE_RSS_
URL=http%3A%2F%2Fwww.oracle.com%2Frss%2Frss_ocom_
corpnews.xml&BOTTOM_RSS_
URL=http%3A%2F%2Fwww.oracle.com%2Ftechnology%2Fsyndication%2Frss_
otn_soft.xml
```

**Problem: Portlet on a dashboard showing "Portlet Not Available" message.**

Possible Solutions:

1. Make sure all servers defined in the `retail-workspace-page-config.xml` in URLs, attributes, parameters, etc. are fully qualified (e.g. `server01.mycompany.com` rather than `server01`).
2. Find out if the portlets are deployed in the same OC4J instance as ORW or the dashboards. It is strongly recommended that ORW, the portlets and the dashboards are deployed in their own OC4J instances.

- 
3. Portlets are deployed on a server with performance issues. Redeploy on a better server.

**Problem: Error is displayed within a portlet on a dashboard.**

Possible Solutions:

1. The URL parameter in `retail-workspace-page-config.xml` corresponding to that portlet contains special characters that are not escaped. These should be escaped properly. It may also be necessary that the URL be placed in a CDATA section. See "Showing Reports in Dashboards" in the Implementation Guide.
2. The URL is invalid. To check the URL, copy and paste it into a browser window. The content should display in the browser.

**Problem: Login page is displayed within a portlet on a dashboard.**

Possible Solution:

1. The content to be displayed in the portlet is not OSSO enabled. Redeploy or reconfigure the content to be OSSO enabled.

**Problem: Portlet not showing any content.**

Possible Solutions:

1. Right-click inside the portlet and then select Refresh within the context menu.
2. Make sure all servers specified in the URL are fully qualified (e.g. `server01.mycompany.com` rather than `server01`).

**Problem: Error is displayed in the launched browser window when clicking on an application's link in the Applications worklist.**

Possible Solution:

1. The application's URL in `retail-workspace-page-config.xml` is invalid. To check the URL, copy and paste it into a browser window. Be sure to append to the URL any parameters specified in configuration file following the URL. For example if the URL is `http://myserver/mycontext/mypage` and a parameter follows with a name of "param" and a value of "prod", the combined URL is `http://myserver/mycontext/mypage?param=prod`.

**Problem: Login page is displayed in the launched browser window when clicking on an application's link in the Applications worklist.**

Possible Solution:

1. The application is not OSSO enabled. See the application's documentation for instructions on how to OSSO enable the application.

**Problem: "Error Accessing BIP Server" is shown when expanding the BIP work item.**

Possible Solutions:

Make sure you are familiar with section "Exposing Reports Links in the Navigation Panel" of the Implementation Guide.

Analyze the error message in the application's log file.

1. If the error is related to an invalid user ID or password, verify that:
  - a. The `bipublisher-login-id` specified in `retail-workspace-page-config.xml` is declared in OID and belongs to the BIP (or XMLP) Administrator role.



---

**Problem: Error when clicking on a report's hyperlink in the OBI EE reports section of the navigation panel.**

Possible Solution:

1. Make sure the URL corresponding to biee-reports-url-prefix in the ORW configuration is valid. Copy and paste it into a browser window and append ?Dashboard to the end of it. You should get an OSSO login screen or the OBI EE login screen depending on whether OBI EE is OSSO enabled or not.

**Problem: A new secure work item, such as a dashboard, is not visible in the Dashboard work list, even after configuring for the work item.**

Possible Solutions:

1. Make sure you have logged in as a user who belongs to one of the roles that has been granted permission to view and access the dashboard.
2. OC4J may be using stale cached . Either wait for OC4J to clear its caches, or stop and re-start the OC4J where the dashboard is installed.

**Problem: have been modified (added or deleted) for a secure work item or secure work list. The logged in user does not see the expected result after changing the grants.**

Possible Solution:

1. OC4J may be using stale cached . Either wait for OC4J to clear its caches, or stop and re-start the OC4J where the dashboard is installed.

