

## **Oracle® Fusion Middleware**

Tutorial for Oracle WebCenter Spaces Users

11g Release 1 (11.1.1)

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Oracle Fusion Middleware Tutorial for Oracle WebCenter Spaces Users, 11g Release 1 (11.1.1)

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# Preface

This tutorial introduces you to Oracle WebCenter Spaces, a self-service, customizable solution for managing individual and group interactions. Developed using Oracle WebCenter Framework, Oracle Application Development Framework (ADF), and Oracle JDeveloper, WebCenter Spaces is a custom application that supports business users in all their daily tasks: managing meetings, keeping up with workflow transactions, working with email, and so on. In addition, this document explains how to use WebCenter Spaces to operate within *group spaces*, a key offering designed to help small groups share information and interact in a collaborative setting.

## Audience

This document is intended for users wishing to familiarize themselves with WebCenter Spaces. While the bulk of the tutorial is geared toward business users, there are some set-up tasks that must be completed by an administrator so that users can work through the tutorial successfully. These steps are documented in [Chapter 1, "Preparing for the Tutorial"](#). Some of these tasks must be completed by a systems administrator, while others are the responsibility of a WebCenter Spaces administrator.

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## Related Documents

For more information, see the following documents in the Oracle WebCenter and Oracle Fusion Middleware documentation sets:

- *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter*
- *Oracle Fusion Middleware User's Guide for Oracle WebCenter*
- *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter*
- *Oracle Fusion Middleware Installation Guide for Oracle WebCenter*
- *Oracle Fusion Middleware Enterprise Deployment Guide for Oracle WebCenter*
- *Oracle Fusion Middleware High Availability Guide*

## 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.
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values, as well as terms defined in text or the glossary.
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, or text that you enter.

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## Preparing for the Tutorial

If you are *not* an administrator, make sure that your administrator has completed the steps in this chapter, then proceed to [Chapter 2, "A Tour of WebCenter Spaces"](#).

If you are an administrator, the tasks described in this chapter must be completed before this tutorial can be successfully completed. Some tasks must be performed by a system administrator with access to Enterprise Manager, your LDAP server, and so on, while others must be performed by a WebCenter administrator with full access to WebCenter Spaces. Note: The system administrator must complete his or her work *before* the WebCenter administrator.

### 1.1 Must Be Completed by a System Administrator

To allow others to work through this tutorial successfully, you must first complete all steps in "Setting Up WebCenter Spaces for the First Time (Roadmap)" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter*. Before you begin working with the checklist, please note the following:

- In Step 4, "Connect back-end services", you do not have to connect the Wiki service, as it is not used in this tutorial.
- In Step 5, "Connect external applications and portlet producers", you do not need to connect any external applications. However, you must register OOTBProducers, which contains all the out-of-the-box portlets provided by WebCenter. One of these portlets, OmniPortlet, is used in this tutorial. Follow the instructions described in "Registering Oracle PDK-Java Producers", using Enterprise Manager rather than WLST.
- You can skip Step 10, "Customize WebCenter Spaces and grant application roles". All necessary customization is described in this chapter.

In addition, the following steps must be performed:

- Create users Monica, Asok, Zeba, and Carl, setting all passwords to welcome1.
- Ensure that both Monica and Zeba have email accounts.
- Manage proxy settings for the RSS service so that users will be able to point to a feed outside your firewall. See "RSS" in *Oracle Fusion Middleware WebLogic Scripting Tool Command Reference*.

### 1.2 Must Be Completed by a WebCenter Administrator

These steps must be completed by a WebCenter administrator. It is important that you complete all the steps listed here, or your users will not be able to complete this tutorial as it is written.

- [Section 1.2.1, "Create the Sales Role and Assign Users to It"](#)
- [Section 1.2.2, "Establish Permissions"](#)
- [Section 1.2.3, "Create a Business Role Page"](#)
- [Section 1.2.4, "Set Permissions On the Page"](#)
- [Section 1.2.5, "Make the Necessary Information Available"](#)

## 1.2.1 Create the Sales Role and Assign Users to It

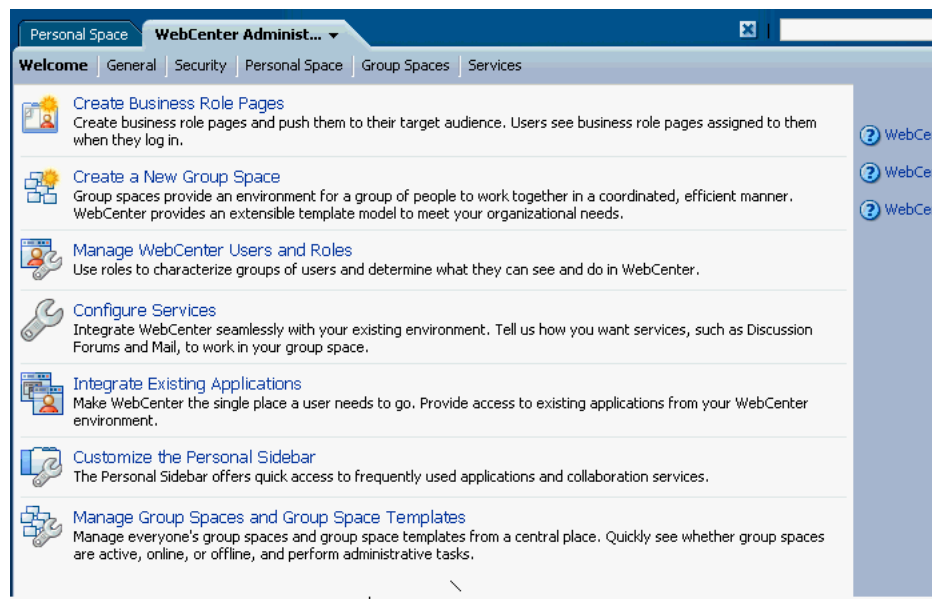
Custom application roles (sometimes known as *user-defined roles*) are specific to your WebCenter Spaces application. When you set up your instance of WebCenter Spaces the first time, you most likely identified which roles were required for your enterprise, chose suitable names, and defined the responsibilities of each role. For example, an education environment might require roles such as Teacher, Student, and Guest, while roles such as Finance, Sales, Human Resources, and Support would be more appropriate for a corporate environment.

To allow users to complete this tutorial, you must define a role called **Sales**, and assign the users Monica, Zeba, and Asok to it. To do this:

1. Log on to WebCenter Spaces as a WebCenter Spaces administrator.
2. Click **Administration** in the Banner.

The Administration Welcome page displays, which lists frequently performed tasks on the left, along with links to the associated areas of WebCenter Spaces. There's also links to the WebCenter documentation along the right side of the page.

**Figure 1–1** WebCenter Administration Welcome Page



3. On the Welcome page, click **Manage WebCenter Users and Roles**.
4. Click **Create Role**.
5. In the **Role Name** field, type **Sales**.

6. In the **Template Role** field, select **Spaces-User**.

As the name implies, a *template role* allows you to start with a role that has already been defined (such as Administrator, Spaces-User, and so on), then customize it under the new name to make it unique.

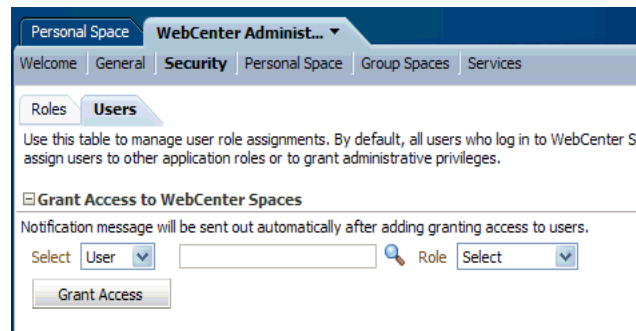
7. Click **OK**.

You should see the **Sales** role column now on the right side of the page under **Roles**.

Now we need to assign this role to the users Monica, Asok, and Zeba.

8. While still on the **Security** page, click the **Users** tab:

**Figure 1–2 Assigning Users to Roles**

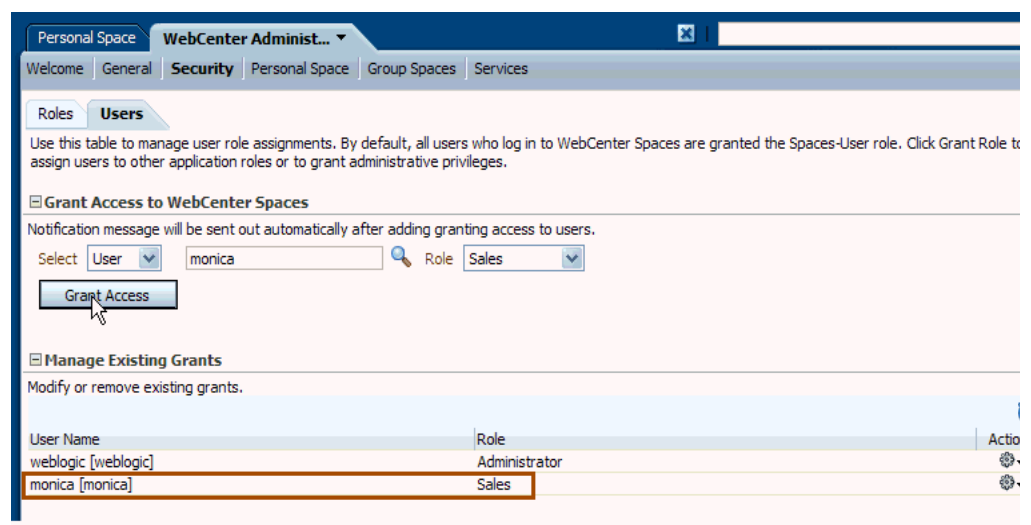


9. In the middle field, type **Monica**, and select **Sales** from the Role pull-down.

10. Click **Grant Access**.

You should now see Monica and her new role beneath **Manage Existing Grants**, as shown here:

**Figure 1–3 Monica Assigned to the Sales Role**



11. Repeat Steps 9 and 10 for the users Zeba and Asok.

## 1.2.2 Establish Permissions

Before Monica and others can interact with key services and components within WebCenter Spaces, you must ensure that they have permissions to do. In this tutorial, Monica and Zeba will create group spaces and pages. Monica will also add a Discussions forum to a page, and establish a link between a page and an event. Each of these actions require permission, which you grant at the role level. As you've just created the Sales role and assigned Monica and Zeba to it, you can provision that role to give both users access to the things they need.

1. While still on the **Security** page, click **Roles**.
2. In the **Sales** column, click the **Manage** check box in the row corresponding to each of these areas:
  - Group Spaces
  - Pages
  - Discussions
  - Links

When you finish, your screen should look like this:

**Figure 1-4** *Setting Permissions for the Sales Role*

Permissions	Administrator	Public-User	Sales	Spaces-User
<b>Group Spaces</b>				
Manage	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Configure	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
View	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Group Space Templates</b>				
<b>Pages</b>				
Manage	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Delete	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Edit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Personalize	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
View	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Discussions</b>				
Manage	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Links</b>				
Manage	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

While the Manage permission means different things for each permission category, it always includes all the actions listed below it. For example, a user with Manage privileges for group spaces will also be able to configure (that is, contribute content to), view, and create group spaces.

3. Click **Apply**.

## 1.2.3 Create a Business Role Page

A *business role page* is an efficient way of rolling out pages to a common audience. When you create a business role page and assign it to a role, the users assigned to that role automatically see the page in their personal spaces. Only WebCenter Spaces administrators can create business role pages.

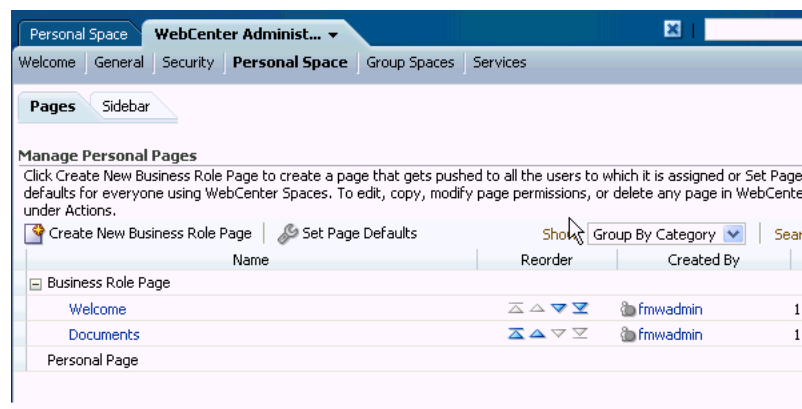
To perform the work in this tutorial, your users need a business role page called **Sales**. To create this page:

### 1. In Administration, click **Personal Space**.

Although you may find it a bit odd to see a page called *Personal Space* as part of WebCenter Administration, it makes more sense when you understand that you use this area to create pages that are displayed in *other people's* personal spaces—namely, business role pages.

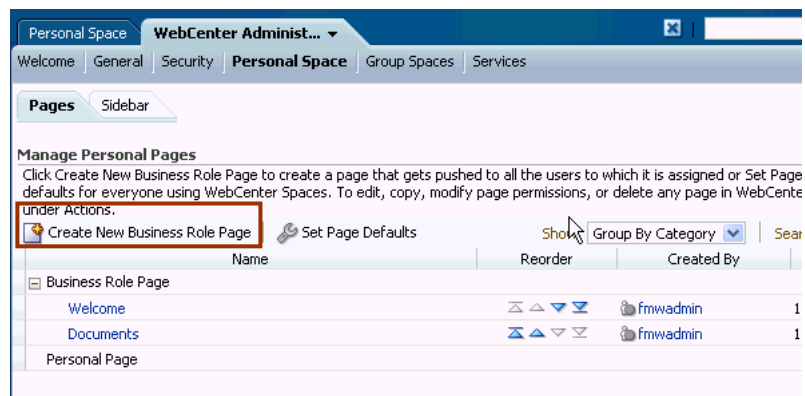
Personal Space offers two tabs, Pages and Sidebar. The Pages tab lists all the business role pages that have been created for this instance of WebCenter Spaces, as well as all the personal pages for all users:

**Figure 1–5 Manage Personal Pages**



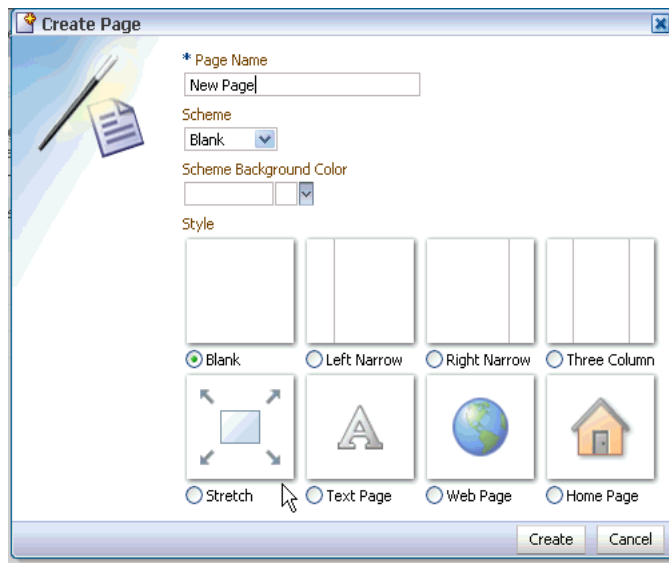
### 2. Click **Create New Business Role Page**:

**Figure 1–6 Create Business Role Page Icon**



The Create Page dialog is displayed:

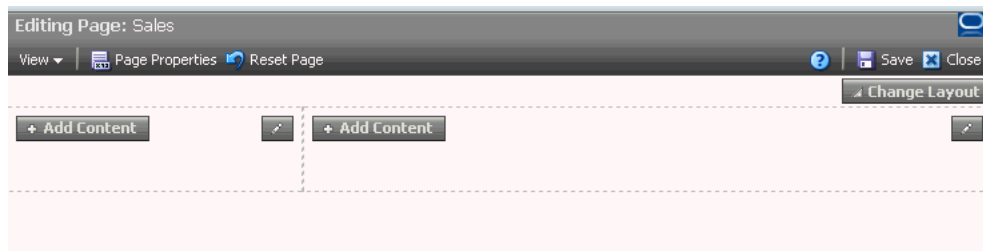
**Figure 1–7 Create Page Dialog**



3. In the **Page Name** field, type *Sales*.
4. Leave the **Scheme** and **Scheme Background** fields defaulted.
5. To select a layout for the page, click the radio button beneath *Left Narrow* (page with a navigation bar along the left).
6. Click **Create**.

Your screen should now look something like this:

**Figure 1–8 Sales Page in Edit Mode**



The user *Monica* will take it from here in [Chapter 3, "Adding Content to A Page"](#), which guides her through the process of populating the page with different types of content. Your next task is to set permissions on the page so that everyone else assigned to the *Sales* role can see it, and so that *Monica* can edit it.

### 1.2.4 Set Permissions On the Page

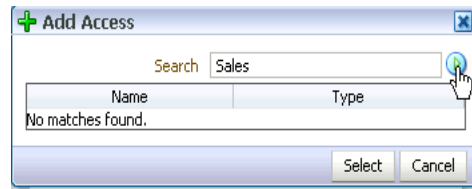
You can set permissions on a business role page either through the WebCenter Administration Personal Space tab ([Figure 1–5, "Manage Personal Pages"](#)), or from the page itself. Since you already have the page in Edit mode, let's do it from here.

1. Click **Page Properties**.
2. In the Page Properties dialog, click the **Security** tab.



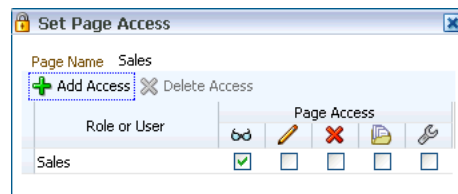
3. Click **Add Access**.
4. In the **Search** field, type **Sales** and click the blue arrow:

**Figure 1–9 Finding the Sales Role**



5. Highlight the **Sales** role and click **Select**.  
Your screen should now look something like this:

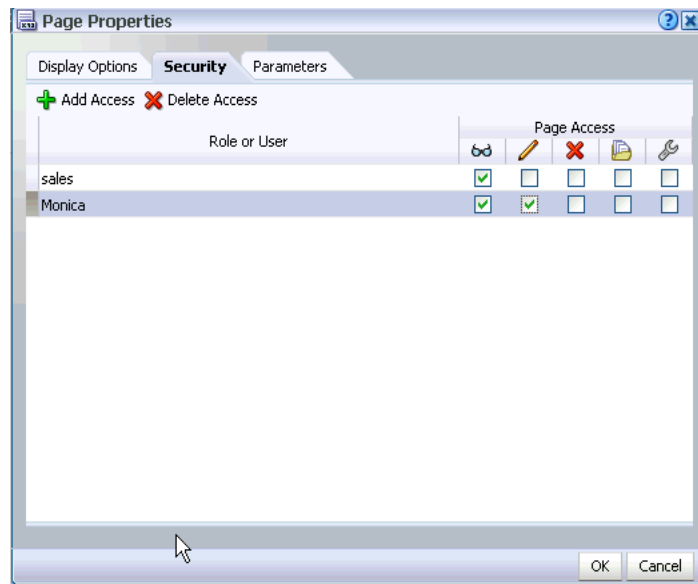
**Figure 1–10 Granting View Privileges to the Sales Role**



By default, the Sales role is assigned the View page access level (indicated by the eyeglasses icon), which means that everyone belonging to this role can see the page, but not edit it. This is appropriate for everyone in your group, with one exception—Monica, who requires Edit access.

6. Click **Add Access** again so you can locate Monica’s name in the Add Access dialog.
7. Use the Search field to locate Monica’s name.
8. When you’ve found it, highlight **Monica** and click **Select**.
9. Back on the **Security** tab, click the checkbox beneath the pencil icon to assign edit privileges to Monica:

**Figure 1–11 Giving Edit Access to Monica**



10. Click **OK** to save your changes and close this dialog.
  11. Click **Close** to exit edit mode, taking care to save your changes to the Sales page.
- Your work on the Sales page is now finished. When people who belong to the Sales role log on, they'll see this page within their own personal spaces.

## 1.2.5 Make the Necessary Information Available

Your users will need several documents to populate their WebCenter pages with meaningful content. These files have been zipped into a file and placed on OTN so you that you can download it to a server that is accessible to your users.

To make the necessary files available:

1. Download SpacesTutorial11gR1.zip from <http://www.oracle.com/technology/products/webcenter/files/spaces/tutorial11gr1.zip> and extract the files to a centrally accessible server. The files are:
  - HR\_Process\_and\_Guidelines.doc
  - StandardsDiscount.csv
  - BIchart1.jpg
  - BIchart2.jpg

### 1.2.5.1 Fill Out the Data Table

You now must communicate some key information to the users who plan to work through this tutorial. To assist with this communication, either use the table shown here, or create one of your own with the same column names. Use the Value column to enter the information your users will need at specific points within this tutorial:

---

<b>For this step...</b>	<b>You will need ...</b>	<b>Value</b>
Section 3.2, "Step 2: Upload a Document"	Location of HR_ Process_and_ Guidelines.doc on the server	
Section 3.3.3, "Add an OmniPortlet"	Location of StandardsDiscount.cs v on the server	
Section 6.3, "Step 3: Adding Documents to the Group Space"	Location of BIChart1.jpg, and BIChart2.jpg on the server	
Section 6.8, "Step 8: Send an Email"	Email log in ID and password for Zeba  Monica's email address	
Section 7.3, "Step 3: Read an Email"	Email log in ID and password for Monica	

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# A Tour of WebCenter Spaces

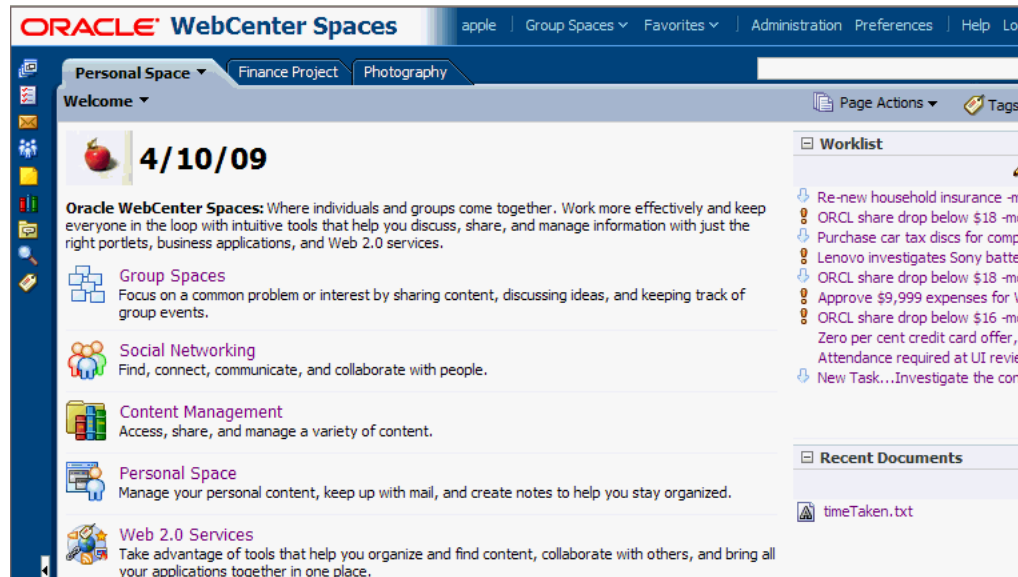
Welcome to Oracle WebCenter Spaces! This chapter first introduces you to key elements of the WebCenter Spaces interface, then explains the scenario you'll use to complete the exercises in this tutorial. Each exercise is designed to familiarize you with a different aspect of WebCenter Spaces functionality, and to demonstrate enough about each feature so that you can operate within WebCenter Spaces independently once you're in your own enterprise. (If you ever need additional information about a feature, you can always refer to *Oracle Fusion Middleware User's Guide for Oracle WebCenter*.)

## 2.1 What is WebCenter Spaces?

Oracle WebCenter Spaces brings you the very latest technology in terms of social networking, communication, collaboration, and personal productivity. Through a robust set of integrated Web 2.0 services and applications, WebCenter Spaces brings together everything you need to exchange ideas with others, keep track of your personal and work-related tasks, interact with your critical applications, and zero in on your own projects and interests. In addition, WebCenter Spaces provides the foundation for establishing social networks within organizations.

Depending on whether you're a WebCenter Spaces administrator or an end user, your view of the WebCenter Spaces interface will look slightly different. (Your view will also vary depending upon your *role*, but we'll get to that later.) From the administrator's perspective, the first screen you see after logging in looks something like this:

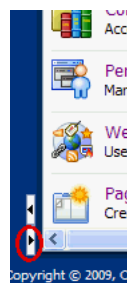
Figure 2-1 The WebCenter Spaces User Interface



The interface can be divided into three main areas: Sidebar, Banner, and page content. Regardless of whether you're an administrator or an end user, these areas are important to every WebCenter Spaces user. Let's take a look at them in a bit more detail:

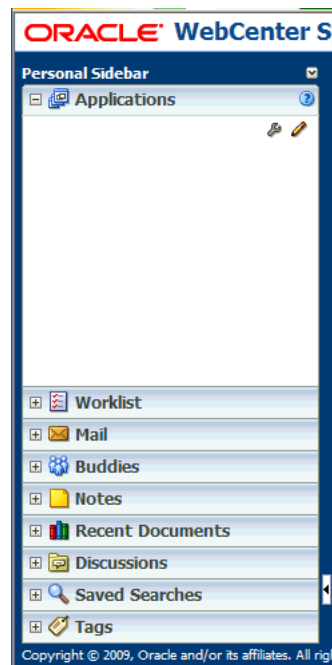
- **Sidebar.** The Sidebar, along the left side of Figure 2-1, is a snapshot view of what's going on across the Spaces application, and offers a place for you to quickly access all the applications and services that are most important to you. By default, the Sidebar is minimized to give you more real estate for the page content area. Let's expand it now by scrolling down to the bottom of your screen and clicking the arrow that points to the right:

Figure 2-2 Icon to Expand Minimized Sidebar



The left side of your screen should now look something like this:

Figure 2-3 The Expanded Sidebar

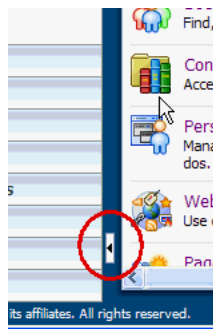


Each blue stripe within the Sidebar is called a *pane*. Each pane reveals information from a particular WebCenter Web 2.0 service or other source that's been scoped to **your** information needs. In other words, the Sidebar is completely unique to you as a WebCenter Spaces user, and completely private; no other WebCenter Spaces user sees the content of your Sidebar, and you cannot see the content of any other user's Sidebar. Your WebCenter Spaces administrator decides which panes will be available before you even log on. Once the administrator has made these decisions, however, there's a whole range of personalization options available that help you zero in on only what **you** want to see. For example, you can configure things like Watched Topics in the Discussions pane, so that you can keep an eye on only the topics you're interested in. Or you can choose to see your worklist items by priority, not by due date. We'll look at some of these personalization options in this tutorial, but by no means all of them. The *Oracle Fusion Middleware User's Guide for Oracle WebCenter* contains an entire chapter devoted to the topic of how you can personalize your WebCenter Spaces experience.

You can use the plus sign (located at the far left of a stripe) to expand a pane, which can sometimes hide or collapse the others. The icons to the right of each pane allow you to perform actions appropriate to the pane that's open. For example, the pencil icon in the Applications pane lets you control whether an application opens in a new browser window or in a new tab, among other things. You'll learn more about that later, as well as more about what many of these panes do.

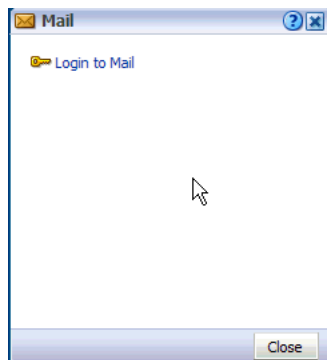
To return to the Sidebar's original (minimized) state, click the icon shown in [Figure 2-4](#).

**Figure 2–4 Icon to Minimize the Sidebar**



You can still interact with any of the Sidebar panes when they're minimized. Just click the appropriate icon to temporarily display the pane's contents in a pop-up. For example, when you click the **Personal mail inbox** icon (which looks like an envelope), the pop-up asks you to log in so you can access your email account:

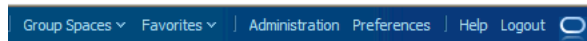
**Figure 2–5 Mail Pop-Up**



Let's move on now to the links in the upper right of the interface.

- **Banner.** The upper right section of the screen is referred to as the *Banner*.

**Figure 2–6 Banner Links**



The links that appear in the Banner are almost always available, no matter where you are within WebCenter Spaces, and provide access to services you'll use from time to time. We'll explore some of these in later exercises, but for now it's important to realize that this is where you can access online help, set your preferences, and access the group spaces through which you'll work in close connection with others. Moreover, if you're an administrator, this is where you'll access the panels and screens you'll need to affect WebCenter Spaces as a whole. (If you're not an administrator, you won't see the Administration link in the Banner.)

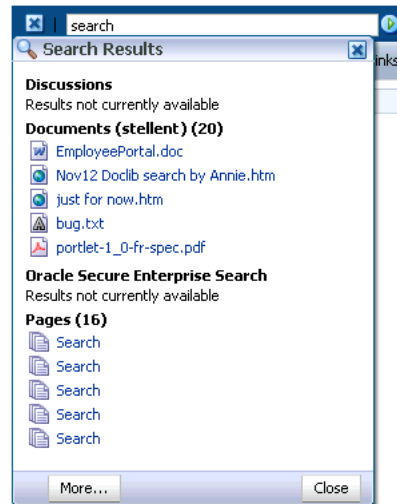
Note: In the far upper right corner, notice the oval beside the Logout link. If this oval is spinning, that means that WebCenter Spaces is busy performing an operation, such as saving data, refreshing the screen, opening a dialog, and so on.



If the oval stops spinning and you haven't received the results you're expecting, you may want to try your request again.

The long text field beneath the links is a search field, which you can use to search authorized content and information for specified keywords. The search results are grouped by the application or service they are coming from, as shown here:

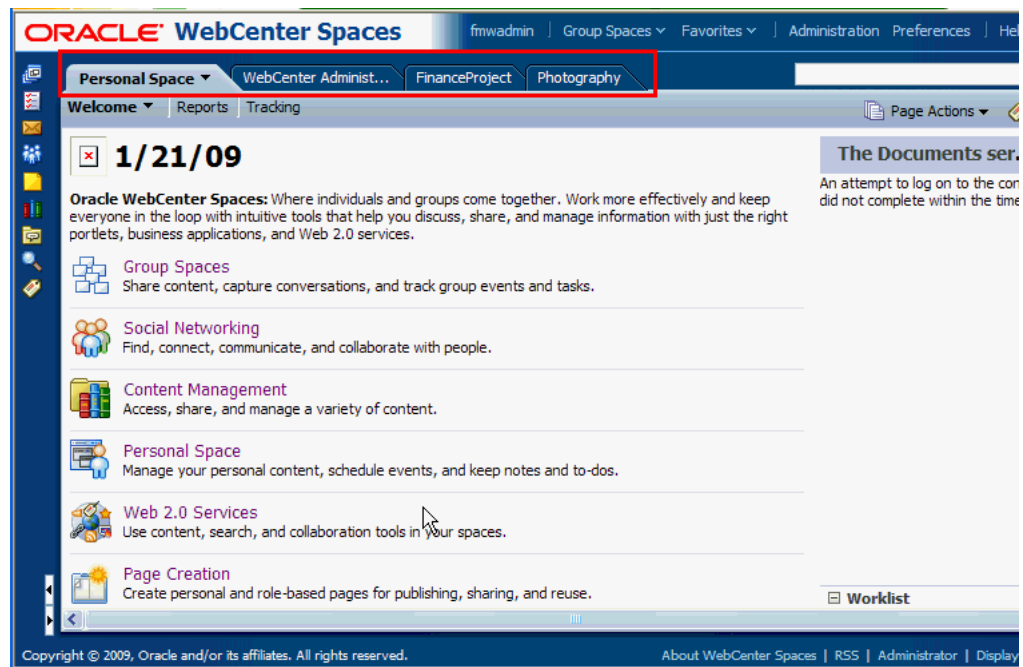
**Figure 2-7 Search Results**



In this example, a search on the word "search" yielded 20 from the Documents services, as well as 16 different pages called Search. You can click on any result to display more details.

- **Page Content.** This is where you'll perform the bulk of your work within WebCenter Spaces. In the following figure, notice that there are four tabs open in the Page Content area: Personal Space, WebCenter Administrator, Finance Project, and Photography:

Figure 2–8 WebCenter Spaces



Each tab represents a different application, service, or *group space*. A group space is a collection of content and services that helps people collaborate on a particular task or interest. By facilitating interaction between people, group spaces provide the basis for social networking within an organization. In Figure 2–8, both Finance Project and Photography are examples of group spaces. WebCenter Spaces provides templates for creating three types of group spaces:

- *Group Project*, which brings together team members working on a targeted project, such as those working on the Finance Project.
- *Community of Interest*, which provide an area for people who share a common interest (such as photography) to exchange information and ideas.
- *Blank*, which creates a group space with a single page, the Home page. This template may be useful when the pages and content supplied by the other templates don't suit your needs. As the name implies, the Blank template gives you an opportunity to build your own group space from scratch. You can then save that group space as a template and apply it to other group sites later on.

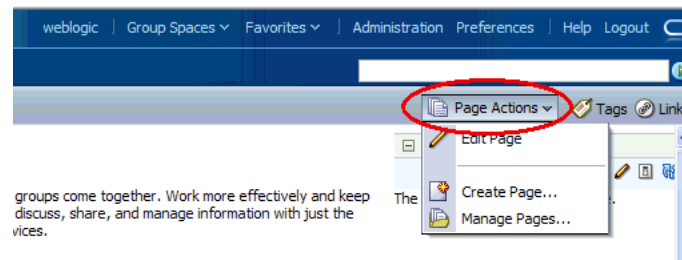
In this tutorial, you will interact with a group project that helps a team of employees at a fictional electronics store grapple with a sales problem and eventually discover its resolution. You'll also build a community of interest based on a subject related to the personal electronics industry.

Neither Personal Space nor WebCenter Administration, both shown in Figure 2–8, are group spaces. A *personal space* is an area in which to keep your own applications, documents, and so forth. Together with the Sidebar, the personal space provides data that is relevant to you only, to help you focus on your own work more effectively. Every WebCenter Spaces user gets his or her own personal space. *WebCenter Administration*, as the name implies, is an area that helps the WebCenter Spaces administrator control things like which services are available to the WebCenter Spaces instance, user and role information, which group spaces are

online or offline, and so forth. We'll visit parts of this user interface later in this tutorial.

Looking at [Figure 2–8](#) again, notice that Personal Space has a row of inlaid tabs called Welcome, Reports, and Tracking. Each of these tabs represent a different *page*. The name of the current page, Welcome, is displayed in bold, with an arrow beside it that allows you to copy the page, hide it, and so on. While working in WebCenter Spaces, you'll find that some pages are pre-created by Oracle, some are created by your administrator or other WebCenter Spaces users, and still others are those that you create yourself using the Page Actions menu, shown here:

**Figure 2–9 Page Actions Menu**



You'll see how to create a page later in this tutorial. For now, the important thing to keep in mind is that every group space contains one or more pages. If you create a group space based on the Community of Interest or Group Project templates, you'll automatically get pages pre-populated with services and applications that are useful for those specific types of networking.

Page Actions is part of another group of links that, like the Banner links, are nearly always available, regardless of whether you're looking at your personal space, a group space, or an application. The difference is, these links are scoped to the current page, whereas the Banner links help you with tasks that relate to WebCenter Spaces as a whole. You'll use most of these links later in this tutorial.

Now that you have an idea of what the WebCenter Spaces interface looks like, it's time to start learning about the scenario you'll use as you work through this tutorial.

## 2.2 About the Storefront Application

This tutorial is based on a fictitious company called Storefront, Inc., an online Web application through which its customers can purchase electronic goods. Similar to Amazon.com in concept, Storefront, Inc.'s web site allows users to shop for items, place them in a shopping basket, and purchase them securely online. In this tutorial, you'll pretend that you are a Storefront employee—actually, three different employees—who uses WebCenter Spaces to complete a set of daily tasks. By working through the exercises in this tutorial, you'll see how WebCenter Spaces helps Storefront employees maximize their productivity on a daily basis, as well as how it helps them organize themselves to focus on solving a problem that surfaces within the organization.

**Note:** As you work through each step, you'll find that this tutorial gives you only the information you need to complete the task at hand. If you want more information about other options you see on a particular page, refer to *Oracle Fusion Middleware User's Guide for Oracle WebCenter*. Also, be sure to type in text exactly as you are instructed, as many of the fields within WebCenter Spaces are case-sensitive.

Turn the page and let's get started!

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## Adding Content to A Page

Monica, the Vice President of Sales for Storefront, Inc., has decided that she needs a new *business role page* for her organization. A business role page is a page that is assigned to a specific role within the WebCenter Spaces membership. Every user belonging to that role—in this case, the Sales role—will automatically see the newly created business role page within their personal spaces. In other words, the page will be *pushed* to potentially hundreds of users, simply by assigning it to a single role.

Only WebCenter Spaces administrators can create a business role page, so Monica has asked her administrator to create a page called Sales (if you're curious about how a business role page is created, read through [Section 1.2.3, "Create a Business Role Page"](#)). She's also asked the administrator to grant her edit privileges on the page so she can add content that is relevant to her staff. Let's see how she goes about adding that content.

### 3.1 Step 1: Log On

To log on as Monica:

1. Click the **Login** link in the Banner area.
2. Enter the user ID `Monica`.
3. Enter the password `welcome1`.
4. Click **OK**.

The first thing you see when you log on is your personal space—specifically, the Welcome page:

**Figure 3–1** Your Personal Space



The Welcome page describes tasks that are commonly performed within WebCenter Spaces, along with links to where those tasks are described in the WebCenter Spaces online help. By default, the Welcome Page also contains a Worklist area, which reflects notifications stemming from your company's workflow processes, as well as a Recent Documents area, which presents a handy list of the documents you've recently accessed within the WebCenter Spaces instance. We'll learn more about documents in the next step.

Notice the Sales page in your personal space, the business role page that the administrator created for you. You'll add some content to that page in a moment, but first you have to make sure that the document you want to add is in the right place.

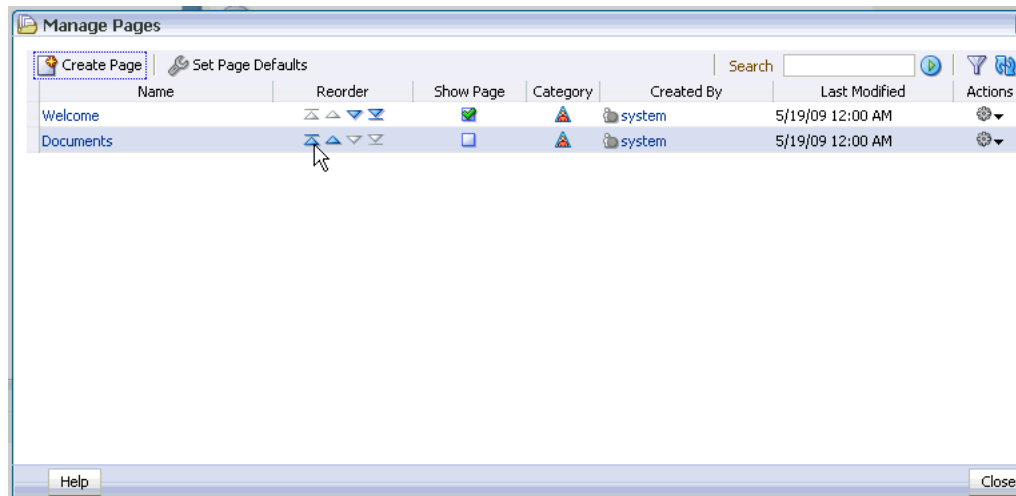
## 3.2 Step 2: Upload a Document

In response to a request from the HR Director, you just finished describing the promotion structure for Sales in a Human Resources Guidelines and Process document. You know your team will be interested in this document, so it seems a likely candidate for your new business role page. To be able to add this document, you first have to make it available to WebCenter Spaces through the Documents service.

By default, your personal space does not display the Documents page, so you have to display it yourself. You can do this easily in just a few quick steps.

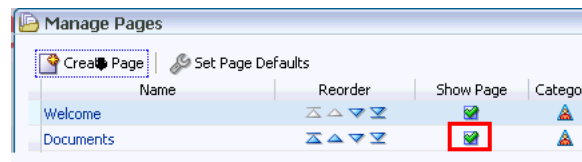
1. Click **Page Actions**->**Manage Pages**:

**Figure 3–2** *Manage Pages Dialog*



Over time, it's likely that you'll visit and re-visit a tremendous number of pages. Some you'll use regularly, others infrequently, and some only once or twice. Leaving all these pages open as tabs within your personal space is probably not the most effective way to move among them. To help you manage your display, WebCenter Spaces lets you decide what you want to display through the Show Page column. In the Show Page column, the green checks indicate which pages are currently displayed as tabs in your personal space. To hide a page, simply click a green arrow to clear the check box.

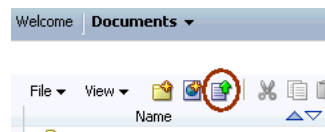
2. On the row for the Documents page, click **Show Page**:

**Figure 3–3 Making the Documents Page Available**

3. Click **Close**.
4. Click **Documents** to display that page.

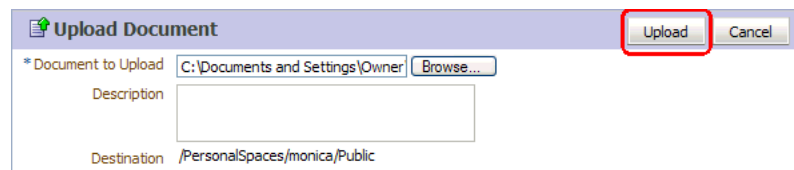
The Documents page doesn't have much on it right now, just the Public folder. As WebCenter Spaces becomes more integrated in your daily life, you'll no doubt use the **Create a new folder** icon frequently to incrementally build your own folder hierarchy. For now, though, the Public folder is all you need. Documents that you intend to share with others must reside in your Public folder.

5. On the Documents page, click the **Public** folder to select it, then click the **Upload document** icon as shown:

**Figure 3–4 Upload Document Icon**

Assuming your WebCenter administrator followed the steps in [Chapter 1, "Preparing for the Tutorial"](#), the document you want to add should be on a server available to you. Make sure you know where this document lives before proceeding.

6. Click **Browse** and locate **HR\_Process\_and\_Guidelines.doc** on the server.
7. When back on the Upload Documents page, click **Upload**:

**Figure 3–5 The Upload Button**

Because you highlighted the Public folder, the Word document is uploaded there.

Now that you've got the document where it needs to be, you're ready to add it to your business role page.

### 3.3 Step 3: Add Content to the Page

1. In your personal space, click **Sales**.
2. Click **Page Actions->Edit Page**.

Your screen should look like this:

**Figure 3–6 Sales Page in Edit Mode**



You are now editing the Sales page using the *Oracle Composer*. Among other things, the Oracle Composer allows you to add content to the page, change the layout, set properties for the page, and so on. We'll explore several of those options in the course of this tutorial.

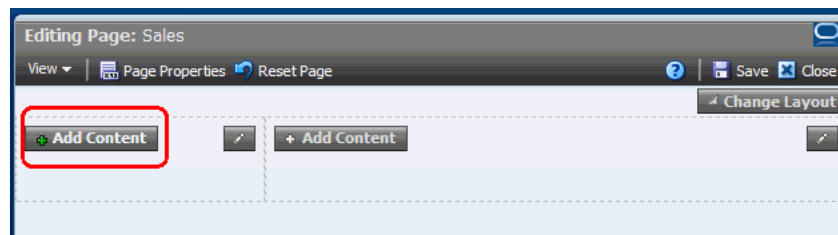
Notice how the page contains dashed lines to indicate two distinct regions on the page: a narrow strip along the left, with a wider area to the right. This layout was selected during page creation. Using the Oracle Composer, you can drop content into each of these regions. In this chapter, you'll first add a title to the page, then some content that you know your Sales staff needs: the Word document you just uploaded, as well as a spreadsheet detailing Storefront's discount structure.

### 3.3.1 Add a Title to the Page

We want the title of the page to appear at the top left. For this we'll need a text editor, which we can access through Oracle Composer's *Layout* component.

1. In the left region, click **Add Content**:

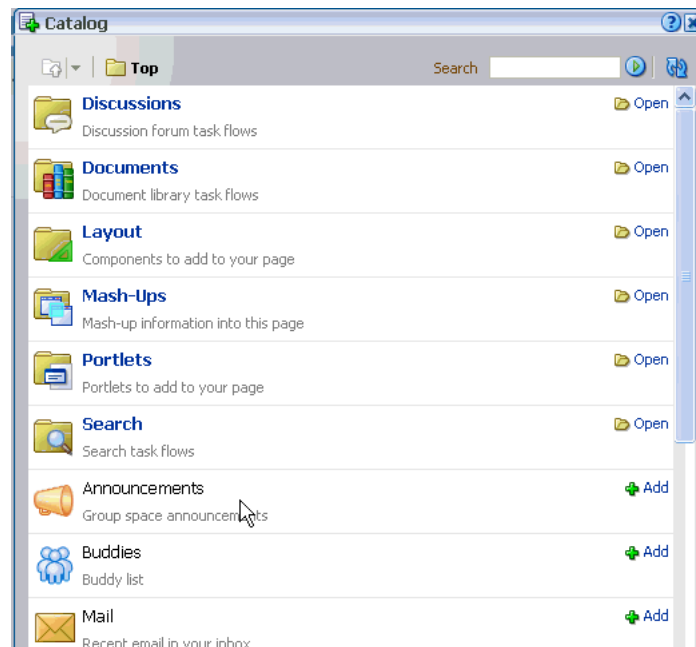
**Figure 3–7 Adding Content to the Page**



The component Catalog appears, as shown here:



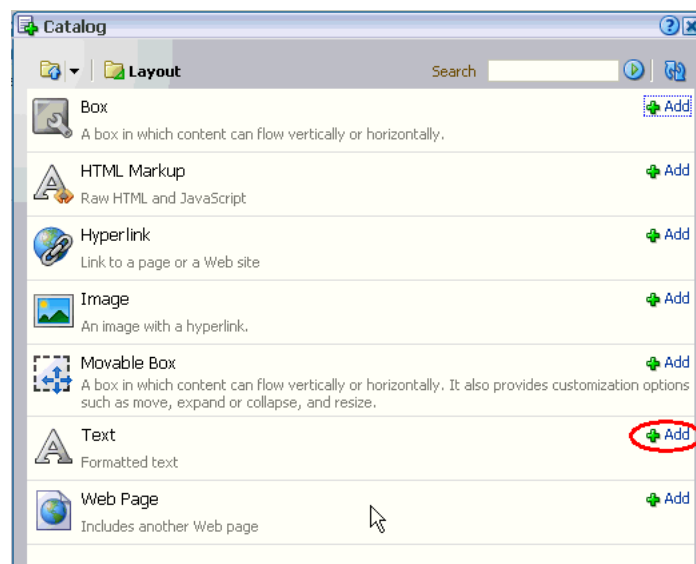
Figure 3–8 Component Catalog



The component Catalog (or simply, "the Catalog") provides you with a wide range of services and useful components, so you can create rich pages in a matter of minutes.

2. Click **Layout**.
3. Next to **Text**, click **Add** to add a rich text editor to the page.

Figure 3–9 Adding a Text Editor

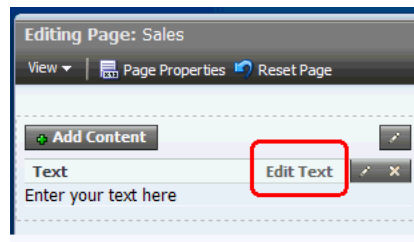


4. Click the **X** at the top right of the Catalog to close it.

Looking at the page, you can see that the editor has been added to the top left region.

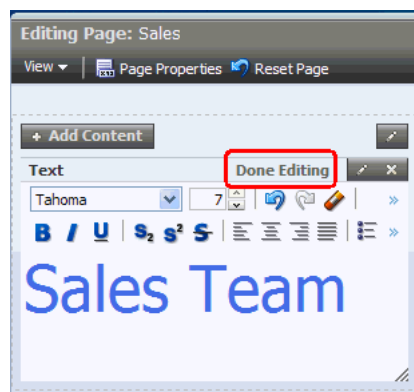
5. Click **Edit Text** to display the editor's full range of controls:

**Figure 3–10** *Displaying the Edit Palette*



6. In the editor, highlight the default text "Enter your text here" and type `Sales Team`.
7. Highlight this text and experiment with the controls to make the title larger, different colors, and so on. When you have the title looking the way you'd like it to look on your page, click **Done Editing**.

**Figure 3–11** *Exiting Edit Mode*

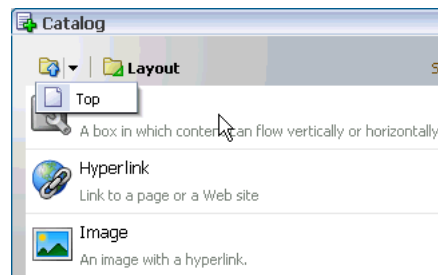


Now let's add some "real" content to this page, in the form of a Word document.

### 3.3.2 Add a Word Document

The Human Resources Guidelines and Process document contains extensive information on the bonus structure and promotion requirements for the Sales team, so it's probably a good idea to add the document to this page. We want this information to be positioned in the page's rightmost region.

1. Click **Add Content** in the right region.  
The Catalog opens to the component you last used, which was the Layout component. We don't need this component now; rather, we need to move up the folder tree so we can see the top level of the Catalog.
2. Click the arrow in the upper left corner of the Catalog, which takes you to the top of the Catalog:

**Figure 3–12 Moving to the Top of the Catalog**

3. In the Catalog, click **Documents**.

All documents that you can add to your WebCenter Spaces pages are accessible through the *Documents* component. There are four categories of documents available to you:

- **All Documents** lists all the documents you have access to, including those from the various group spaces of which you are a member.
- **Documents** provides a means for you to add a graphical view of all the documents to which you have access, plus a full set of management controls for things like uploading documents, creating new folders, and so on.
- **Personal Documents** contains all the documents you have uploaded or created on the Documents page in your personal space. (If you were creating this page within in a group space, this category would be called Group Space Documents, rather than Personal Documents.)
- **Recent Documents** provides a way for you to add a list of the documents you have recently updated or added to the page.

The Documents categories provide a synthesized view of all the content repositories your WebCenter Administrator has configured for WebCenter Spaces. You don't need to know or care which repositories those are, or where they physically reside—the Documents service treats them as a single, cohesive whole.

4. Click **Open** next to Personal Documents.

5. Click **Public**, which houses content that other users are authorized to see.

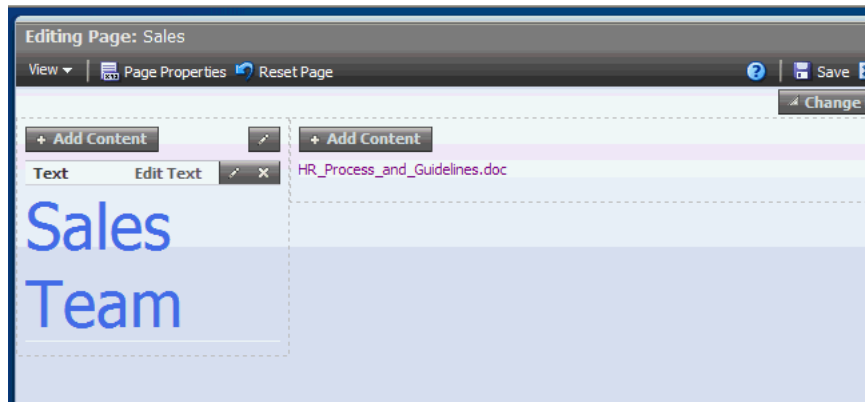
If you add a document to a page from any other folder, other WebCenter Spaces users won't be able to see it. Because you already added *HR\_Process\_and\_Guidelines.doc* to this folder in [Section 3.2, "Step 2: Upload a Document"](#), you should see it there now.

6. Next to **HR\_Process\_and\_Guidelines.doc**, click **Add**.

7. Close the Catalog.

Your screen should now look like this:

Figure 3–13 Word Document Dropped on a Page



As you can see, a link to the document you just added appears on the page. When users click this link, the Process and Guidelines document will open in another browser window.

Whether content appears as a link or directly inline depends upon what type of content you are adding. Images and text/html documents are rendered inline; all other document types appear as links.

What other kind of content might the Sales team find useful? You recall seeing a spreadsheet on the standard discounts that Salesfront offers, and realize that it might be useful to turn that spreadsheet into a portlet. This can be easily accomplished through the use of an *OmniPortlet*.

### 3.3.3 Add an OmniPortlet

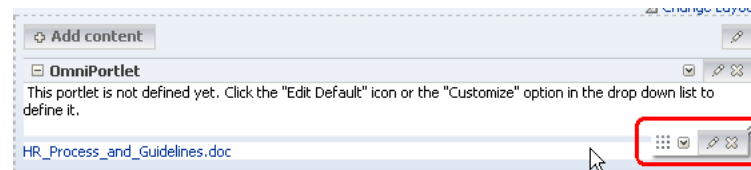
OmniPortlet is a subcomponent of Oracle WebCenter Framework that enables you to easily publish data from various data sources using a variety of layouts—without writing any code. You can base an OmniPortlet on almost any kind of data source, such as a Web service, a SQL database, spreadsheet, XML, and even application data from an existing Web page. When you use an OmniPortlet, the data displays directly on the page, as opposed to the link you get with a Word document. Let's see how you might use an OmniPortlet to display a spreadsheet you know your team would find extremely valuable, *StandardDiscounts.csv*.

1. Click **Add Content** in the same region containing the Word document.
2. Click the arrow in the upper left corner of the Catalog, then click **Top**.
3. Click **Portlets**.
4. Click **wc\_OmniPortlet**.
5. Click **Add** beside OmniPortlet and close the Catalog.

The OmniPortlet is placed *above* the Human Resources document, which is not what you want. It's a simple matter to switch the positions of the two pieces of content.

6. Place your cursor beside the link to *HR\_Process\_and\_Guidelines.doc*.

A set of editing controls displays, as shown here:

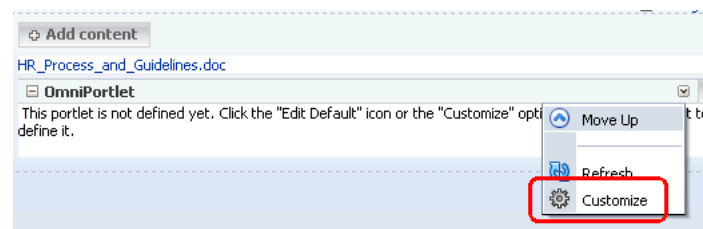
**Figure 3–14 Rearranging the Order of Content**

7. Click the little arrow, then click **Move Up**.

The Word document now appears first within the region.

Time now to configure the OmniPortlet so it displays the spreadsheet.

8. Click the little arrow in the portlet's header (shown in [Figure 3–15](#)) to display the available actions, then click **Customize**.

**Figure 3–15 Customizing an OmniPortlet**

The OmniPortlet wizard opens, which guides you through the steps for adding content to and selecting a layout for the portlet.

9. On the Type screen, click **Spreadsheet**, then click **Next**.
10. On the Source screen, in the field, enter the location of the StandardsDiscount.csv spreadsheet given to you by your WebCenter administrator.
11. Click **Next**.
12. We don't need to specify anything on the Filter screen, so click **Next**.
13. On the View screen, type `Standard Discounts` in the **Title** field.
14. Under Layout Style, click **Tabular**.
15. Click **Next**.
16. On the Layout screen, use the **Column Label** fields to rename the columns to more meaningful headings: Plan, Revenue, Discount Percentage, and Warranty Extension.
17. Click **Finish**.

Now the information contained in the .csv file displays on the page, readily available to all Sales employees.

You're finished adding content to the Sales page, so click **Close** at the top of editing session and answer **Save** on the Confirm Close pop-up.



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## Organizing a Team Project

At this morning's staff meeting, one of the top salespeople reported that sales of Tony Notebooks, historically one of Storefront's best performers, have slipped dramatically over the last quarter. As Vice President of Sales, you need to quickly assemble a team to examine this problem, find the source, and correct it, *before* next quarter's sales figures are adversely impacted. This situation is perfectly suited to the benefits provided by a *group project*. Let's review what a group project is and how it might be of value to you in this situation.

Within any company, large groups or departments frequently need to break into smaller groups to focus on a particular goal, project, or topic. To help these groups organize themselves, WebCenter Spaces provides the notion of *group spaces*, which brings together the appropriate tools and services to support the ultimate purpose of the group. In 11g Release 1 (11.1.1), WebCenter Spaces provides two templates that support two very different types of endeavors:

- **Group Project**, which helps people share documents, communicate with one another, keep up to date on status, and just generally function better as a team than as individuals working side by side. You'll become familiar with what the Group Project template provides in the next few chapters.
- **Community of Interest**, which supports the needs of people who want to share information on a given topic, as opposed to collaborating to achieve a goal or complete a project. For example, all the Java programmers responsible for supporting your customer-facing Web site might want a place to keep up with what's happening in the Java world using discussion forums, links to articles about upcoming patches, and so on. You'll build your own Community of Interest when you get to [Chapter 9, "Creating a Community of Interest"](#).

If the pages and content supplied by these templates don't suit your needs, you can use the **Blank** template to create your own group space from scratch. The Blank template creates a group space with a just single page, the Home page. After you customize the group space, you can save it as a template and apply it to other group spaces later on. You might want to create a Customer Escalation template, say, or one devoted to the activities attendant to the end of the fiscal year. Blank templates help you to support projects that are unique to your company or department. (Any group space can be saved as a template and applied later on, not just those based on the Blank template.)

In this case, a group project is definitely what you need, so let's see what's involved in creating one. You're already logged in as Monica, so you can dive right in.

### 4.1 Step 1: Create a Group Project

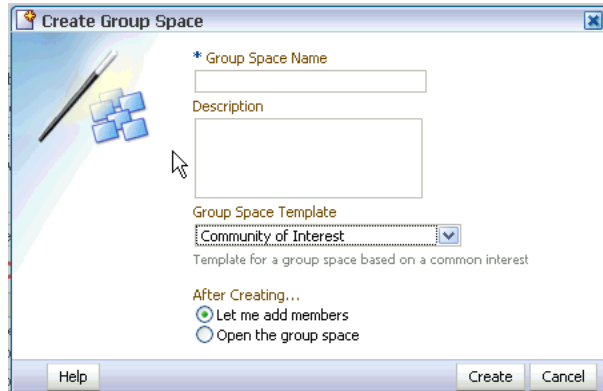
1. In the Banner, click **Group Spaces**.

In the drop-down, all the group spaces you can access are listed below the line. When you select one, it opens at the same level as your personal space. Now, however, we want to create a new group space.

2. Click **Create Group Space...**

Create Group Space opens, which looks like this:

**Figure 4–1 Create Group Space**



3. In the **Group Space Name** field, type `Tony Notebook Sales_abc`, where `abc` are your initials. This helps differentiate your group space from other users who may also be working through this tutorial.

4. In the **Description** field, type `Determine the cause of the sales dip for Tony Notebooks over the last quarter.`

5. From the **Group Space Template** field, select **Group Project**.

The Group Project template provides you with all the collaborative tools and services you need to operate within a group space effectively, scattered among the pages Home, Documents, Discussions, and so on. We'll see demonstrations of these tools, and the pages on which they live, in subsequent steps.

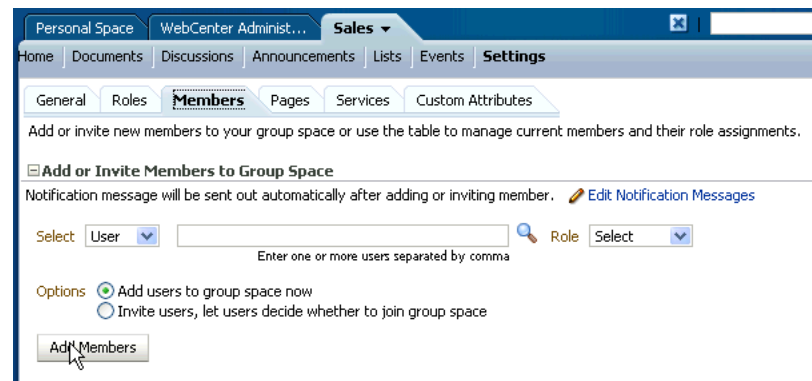
6. You'll want to add members to your group space after you create it, so click **Let me add members**.

7. Click **Create**.

The group space opens to the Members tab, which is right where you need to be.



Figure 4–2 Group Space Members Tab



Let's go ahead and add some key members of your Sales organization so they can begin tackling this problem.

## 4.2 Step 2: Add Members to the Group Space

Since you created the group space, you are automatically considered a *group space moderator* and thus have access to the group space's Settings page. Settings is where you control things like membership for the group, what services the group space will have access to, whether people can request membership to the group, and so on. Before you begin adding members, let's see what other options are available to you as a group space moderator.

### 1. Click **General**.

Take a moment to examine all the options you have for controlling the appearance (logo, copyright information, and so on), status (online or offline), and other aspects of your group space.

Figure 4–3 Group Space General Page



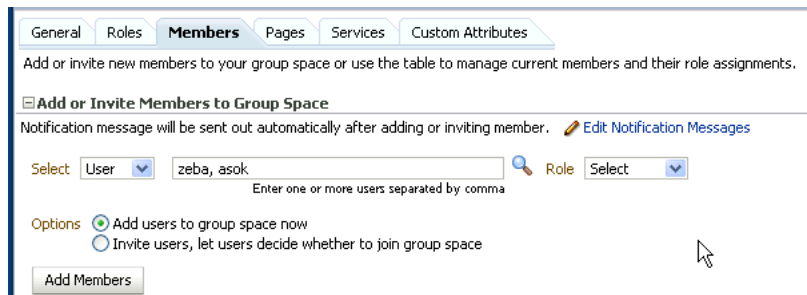
Although we won't experiment with any of these options now, it's important to know that they're available. Let's return to the task of adding members to this group space.

2. Click **Members**.

As one of your most knowledgeable and experienced salespeople, Zeba will no doubt be instrumental in solving this problem. Asok, a member of the Customer Service organization, knows a great deal about Storefront's offerings and customers' satisfaction with them. He also has a good handle on what your competitors offer in the way of service contracts, warranties, and so on. Let's add both Zeba and Asok to the group space now.

3. Under **Add or Invite Members to Group Space**, enter zeba , asok:

Figure 4–4 Adding Asok and Zeba to the Group Space

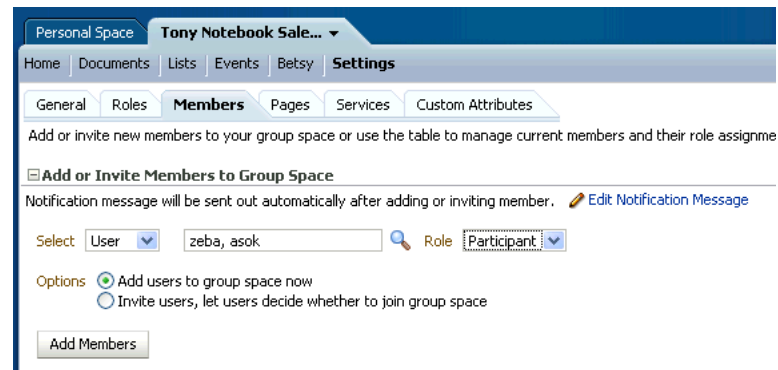


- Click the arrow in the **Role** drop down and look at the different options: *Moderator*, *Participant*, and *Viewer*.

*Participants* can upload and share documents, initiate chats with other group space members, and so on, while *viewers* can look at the data relevant to the group space, but cannot contribute any of their own. *Moderators* have full control over the membership and behavior of the group space, and can access the Settings pages, such as the one shown in [Figure 4-3, "Group Space General Page"](#). Moderator status should be granted with care.

- Highlight **Participant** in the drop-down list:

**Figure 4-5** *Selecting the Participant Role*



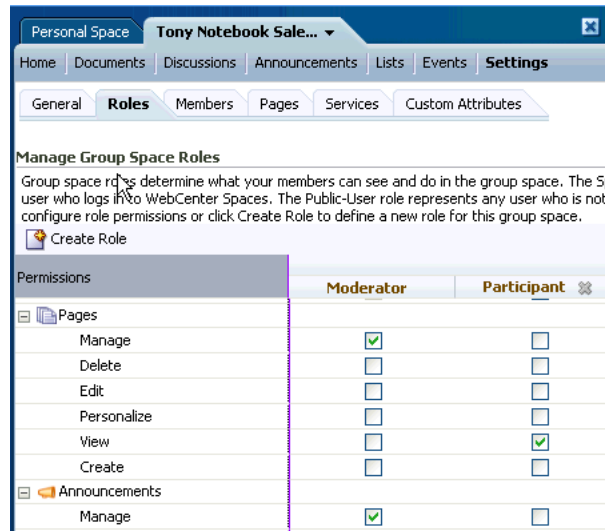
- Click **Add Members** to commit your changes.

A notification is automatically sent to Zeba and Asok's Worklist pane (which appears in their Sidebars, as well as on their personal space Welcome pages) to indicate that they have been added as members of the Tony Notebook Sales group space. You can also see their names added to the list under **Manage Group Space Members** on the Members tab.

One more thing—by default, the Participant role does not have the ability to add or edit pages. You know that Zeba, at least, will need this privilege, so you'd better change the permissions for the Participant role.

- Under Settings, click the **Roles** tab:

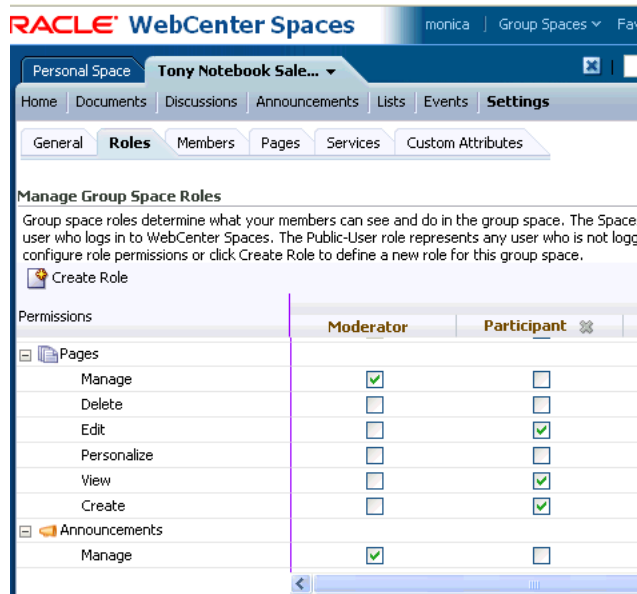
**Figure 4–6 Default Participant Role Permissions**



By default, participants are allowed to see pages, but in most cases the group space moderator will want to extend those privileges to make the role truly that of a participant.

- In the **Participant** column, check the rows **Create** and **Edit** under **Pages**:

**Figure 4–7 Expanding the Participant Role**



- Click **Apply**.

Zeba and Asok, both members of your Sales team, are certain to be key participants in this effort, but you realize that you may also need to draw from the wisdom of someone who does not report to you—Carl, a member of the Finance organization who is an expert on the terms of your competitors’ cost structures. Because he’s not in your organization, you don’t feel comfortable just assigning Carl to this group space as

you did with Zeba and Asok. Instead, you'd like to observe the formality of *inviting* him to participate in this group space.

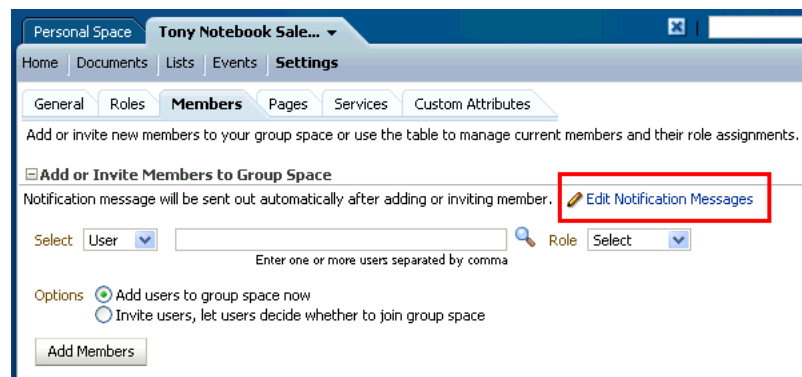
### 4.3 Step 3: Invite a New Member

You want to be sure you've covered all bases, so you've decided to invite Carl to become a member of this group space so he can share what he knows.

First, you want to tailor the message that Carl will see when he views your invitation.

1. Click **Edit Notification Messages**:

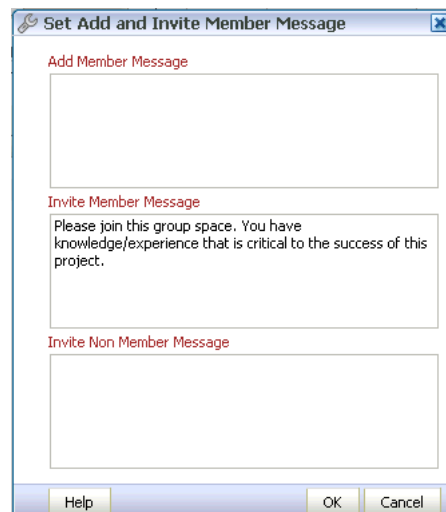
**Figure 4–8** *Edit Notification Messages*



This is where you create the messages that members will see when you add them directly to the group space (like Asok and Zeba), or when you invite someone but let them decide whether to join (like we're about to do with Carl).

2. In the **Invite Member Message** field, type `Please join this group space. You have knowledge/experience that is critical to the success of this project.`

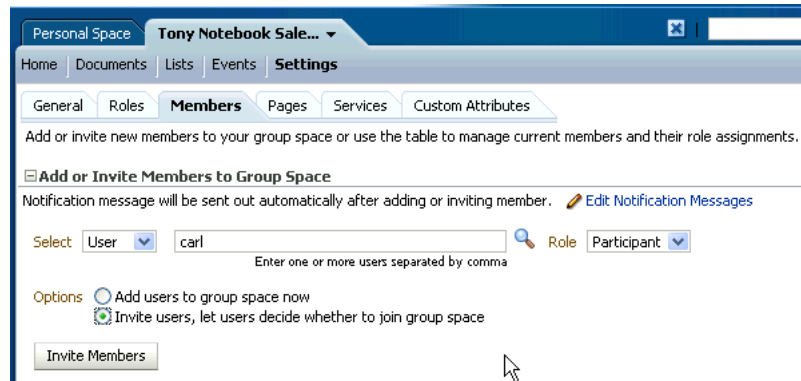
**Figure 4–9** *Setting the Invite Member Message*



3. Click **OK**.

4. Back on the Members tab, type Carl in the field and select **Participant** as the role.
5. Click **Invite users, let users decide whether to join group space**:

**Figure 4–10 Inviting Carl to Join the Group Space**

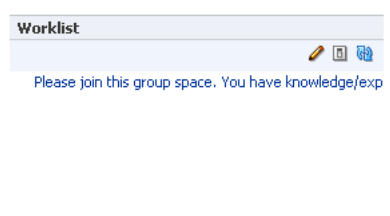


6. Click **Invite Members** to extend your invitation to Carl.

Under **Manage Group Space Members**, notice that Carl’s membership status says **Invited**. Only after Carl accepts his membership will this status change to **Member**.

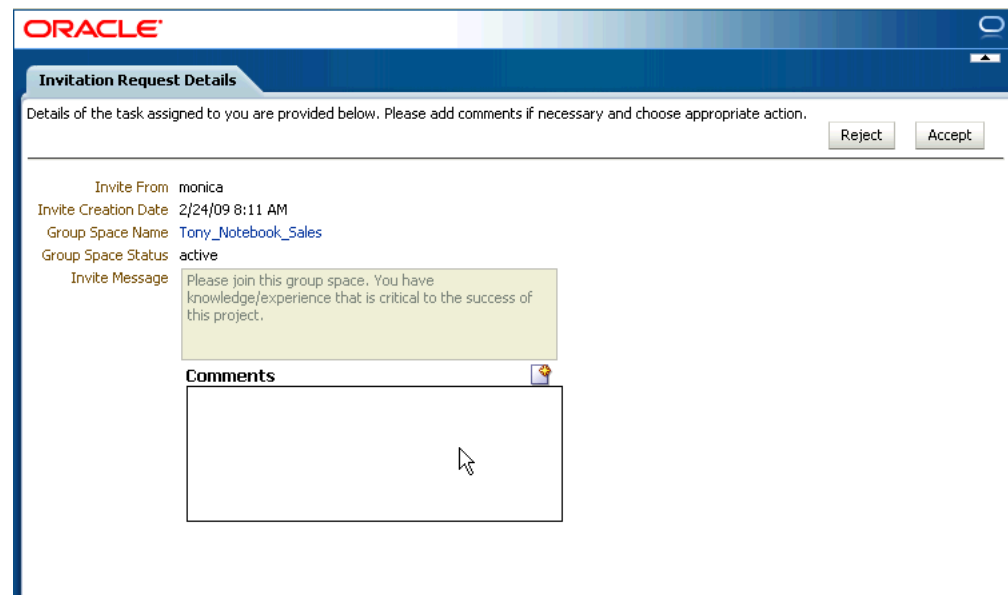
Although we won’t see it in this tutorial, when Carl logs on to his personal space he’ll receive an invitation to this group space in his Worklist pane, as shown here:

**Figure 4–11 Invitation in Carl’s Worklist Pane**



When he clicks on the invitation, he’ll be asked to sign in to the Oracle BPEL Process Manager, which provides the Worklist service. Once he does so, he’ll have the opportunity to approve or reject the invitation, as shown in [Figure 4–12](#):

Figure 4–12 Accepting or Rejecting an Invitation



Assuming Carl clicks **Accept**, Tony Notebook Sales will then appear in the list of group spaces that he can access.

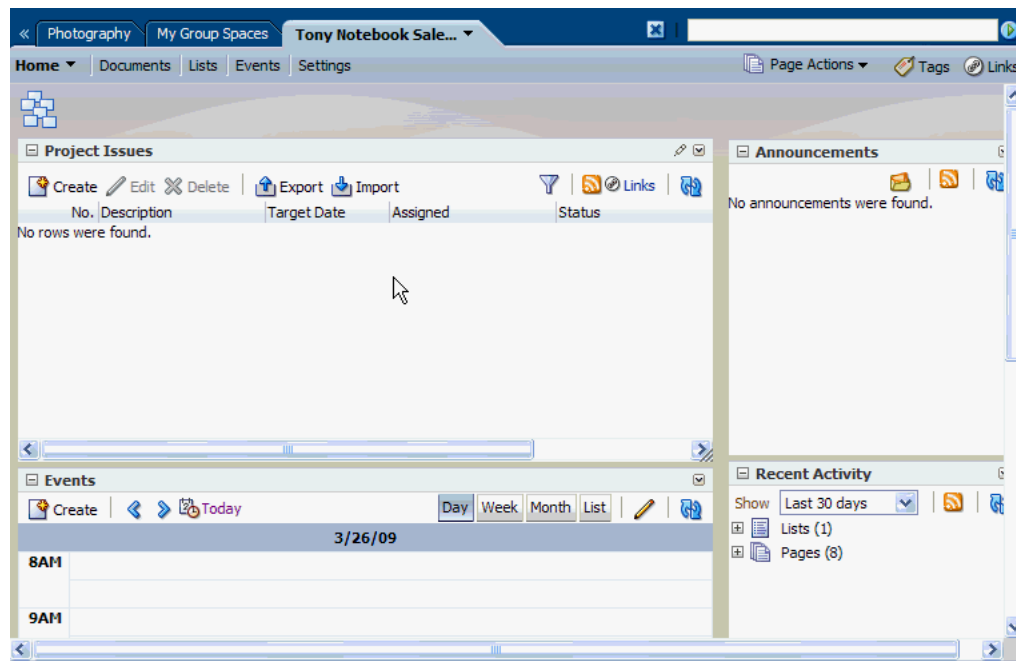
## 4.4 Step 4: Examine the Home Page

Before we go too much further, let's take a moment to examine the default home page for Tony Notebook Sales.

1. Click **Home**.

Your screen should look something like this:

Figure 4–13 Project Group Space Default Home Page



The Home page contains several services that facilitate collaboration between group space members. On the left you see Project Issues, which allows you to track open items facing the group, and Events, which allows you to schedule meetings for everyone in the group space. On the right, Announcements publishes important messages for group distribution; Recent Activity shows what pages have recently been visited within the group space; and Members displays presence information for all group space members.

Each of the areas on the page—Project Issues, Events, and so on—are referred to as *task flows*. Task flows provide reusable functionality that may expose all or a subset of the features available from a particular service. For example, Project Issues is just one example of the List Viewer task flow, which is provided by the Lists service. The List Viewer task flow helps you add and manage list data. As a WebCenter Spaces user you don't have to worry about the relationship between services and their task flows, but you should be familiar with the term, as it appears throughout the WebCenter documentation set.

Although the page shown in Figure 4–13 depicts the default Home page for a group project, your WebCenter administrator may have altered the template to better suit the needs of your group or company. Once you've configured it, any page may be saved as a template for subsequent use.

Let's get back to our scenario.

## 4.5 Step 5: Schedule a Team Event

Now you want to schedule a meeting for the group space members so you can officially kick off this project. You could go to the Events page in Tony Notebook Sales, but you don't have to—the Events task flow is already exposed right on the Home page.

1. In the **Events** task flow, **Create** in the upper left corner.



The **Create Event** dialog displays:

**Figure 4–14 Create Event Dialog**

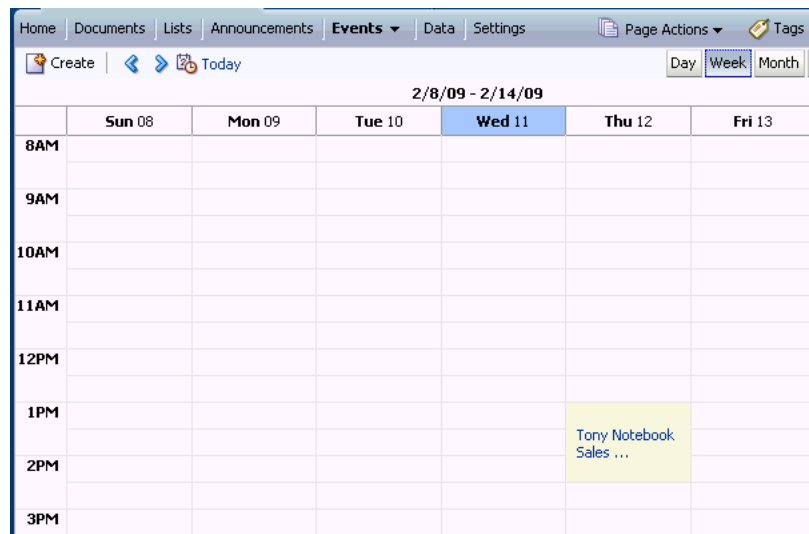
2. In the **Title** field, type Tony Notebook Sales Kickoff.
3. In the **Location** field, enter a room number, such as 888.
4. In the **Start Time** field choose tomorrow's date, specifying that the meeting should start at 1:00 p.m.
5. In the **End Time** field, choose the same date, but have the meeting end at 2:30 p.m.
6. Click **Create**.

You should get a confirmation, as well as a question asking if you want to send an email. Since your team members will no doubt look at the Home page carefully when they're becoming acquainted with this new group space, there's no need to send an email.

7. Click **No** to close the Send Mail pop-up.
8. Back on the **Home** page, make sure that **Week** is selected in the Events task flow to ensure that you are looking at a weekly view:

You should see your meeting scheduled for tomorrow:

Figure 4–15 New Meeting in the Weekly View



Let's continue on and make use of some of WebCenter Spaces's other productivity features.

## 4.6 Step 6: Create a Discussion Forum

You've got Asok and Zeba focusing on this issue, but it's certainly worthwhile to solicit the opinions of others outside as Sales as well to see if they have any insight into what could be causing the problem with Tony Notebook sales. Rather than starting individual chats or email threads with many different people, the most efficient method of communicating in this circumstance is to use a *discussion forum*.

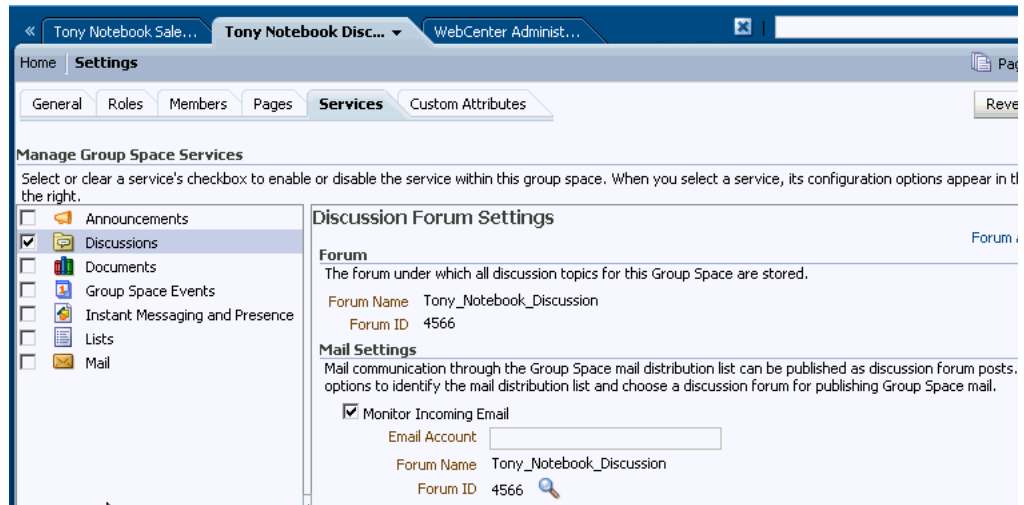
Although the Tony Notebook Sales group space has its own Discussions page, that page is for group space members only. People outside your membership won't be able to participate, which kind of defeats your goal. Perhaps the best solution is to create a new group space that is open to all Storefront Inc users, so you can draw opinions from the Sales team, Customer Support, Technical Services, and so on.

1. Click **Group Space->Create Group Space**.
2. In the **Name** field, type `Tony Notebooks Discussion`, since that is the primary focus of this group space.
3. From the Template drop-down, select **Blank**.
4. Leave **Let me add members** selected.
5. Click **Create**.

The **Members** tab opens. Before addressing membership, we need to enable the Discussion service for this group space. If we don't do that, we won't be able to create a discussions forum.

6. Under **Settings**, click the **Services** tab.
7. Check the box next to **Discussions** to enable that service for the Tony Notebooks Discussion group space, then click **Apply**:

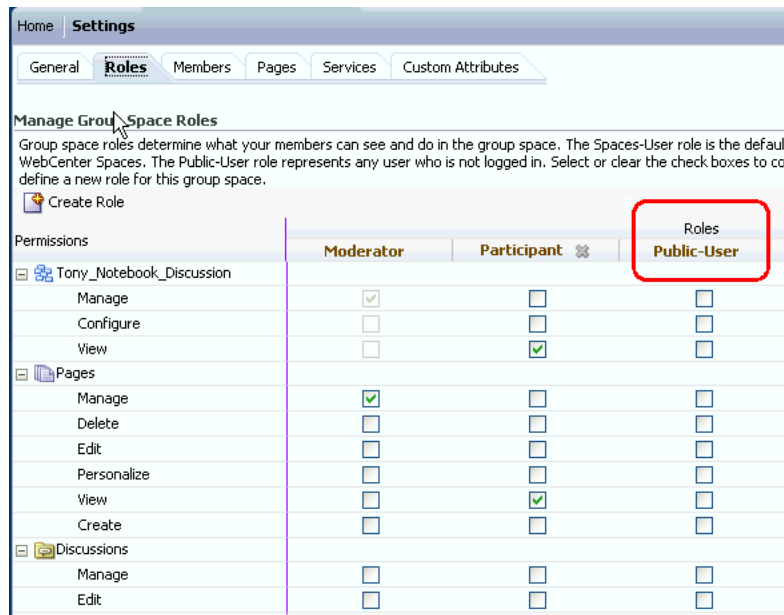
Figure 4-16 Enabling the Discussions Service for the Group Space



Now it's time to establish membership for the group space. For Tony Notebook Discussion, you want to open membership to everyone at your company, even those who do not have a WebCenter Spaces user account. You can do this using the Public-User role.

8. Click the **Roles** tab.
9. Locate the Public-User role:

Figure 4-17 Public-User Role



To make a group space publicly available, you must give the Public-User View privileges for both the group space and the pages within it.

10. In the **Public-User** column, click the box that corresponds to **View** under **Tony\_Notebook\_Discussion**, as well as **Pages**:

**Figure 4–18 Making a Group Space Publicly Available**

Permissions	Roles		
	Moderator	Participant	Public-User
<ul style="list-style-type: none"> <li>Tony_Notebook_Discussion                             <ul style="list-style-type: none"> <li>Manage <input checked="" type="checkbox"/></li> <li>Configure <input type="checkbox"/></li> <li>View <input type="checkbox"/> <input checked="" type="checkbox"/></li> </ul> </li> <li>Pages                             <ul style="list-style-type: none"> <li>Manage <input checked="" type="checkbox"/></li> <li>Delete <input type="checkbox"/></li> <li>Edit <input type="checkbox"/></li> <li>Personalize <input type="checkbox"/></li> <li>View <input type="checkbox"/> <input checked="" type="checkbox"/></li> <li>Create <input type="checkbox"/></li> </ul> </li> </ul>			

11. Click **Apply**.

This allows public users to see the group space, but you still have to give them permission to interact with the Discussions service specifically.

12. Scroll down until you see Discussions, then grant **Edit** permissions to the Public-Users role:

**Figure 4–19 Allowing Users to Edit a Discussions Forum**

Manage Group Space Roles

Group space roles determine what your members can see and do in the group space. The Spaces-User role is the default who logs in to WebCenter Spaces. The Public-User role represents any user who is not logged in. Select or clear the checkboxes or click Create Role to define a new role for this group space.

Permissions	Roles		
	Moderator	Participant	Public-User
<ul style="list-style-type: none"> <li>Tony_Notebook_Discussions                             <ul style="list-style-type: none"> <li>Manage <input checked="" type="checkbox"/></li> <li>Configure <input type="checkbox"/></li> <li>View <input type="checkbox"/> <input checked="" type="checkbox"/></li> </ul> </li> <li>Pages                             <ul style="list-style-type: none"> <li>Manage <input checked="" type="checkbox"/></li> <li>Delete <input type="checkbox"/></li> <li>Edit <input type="checkbox"/></li> <li>Personalize <input type="checkbox"/></li> <li>View <input type="checkbox"/> <input checked="" type="checkbox"/></li> <li>Create <input type="checkbox"/></li> </ul> </li> <li>Discussions                             <ul style="list-style-type: none"> <li>Manage <input type="checkbox"/></li> <li>Edit <input type="checkbox"/> <input checked="" type="checkbox"/></li> <li>View <input type="checkbox"/></li> </ul> </li> <li>Links</li> </ul>			

13. Click **Apply**.

Now let's go back to the Home page and create a discussions forum for the Tony Notebook sales issue.

14. Click the **Home** tab.

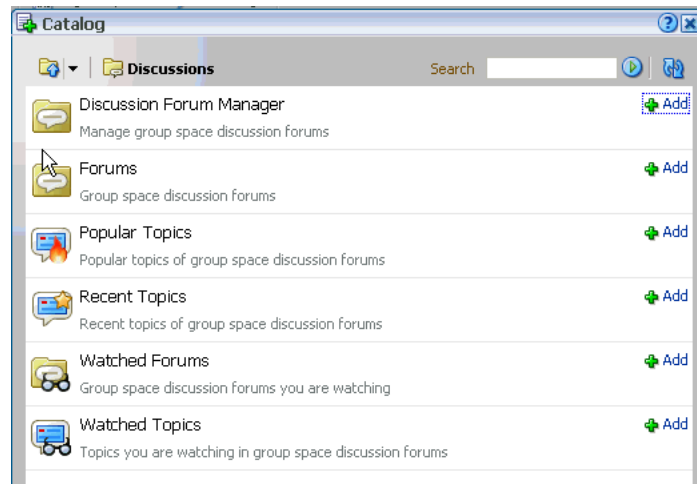
Because we selected the Blank template for this group space, it contains only one page—the Home page—with nothing on it.

15. Click **Page Actions->Edit Page**.

16. Click **Add Content**.

17. In the Catalog, click **Discussions** to display the Discussions service task flows:

**Figure 4–20 Discussions Task Flows**



You can use these task flows to keep track of the topics or forums that are of interest to you. (For a full description of what each task flow provides, see the *Oracle Fusion Middleware User's Guide for Oracle WebCenter*). The Discussion Forum Manager is the task flow you use to create a discussions forum.

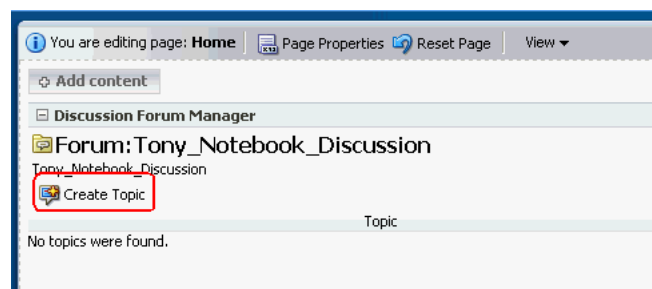
18. Click **Add** next to **Discussions Forum Manager**, then close the Catalog.

The forum name automatically takes the name of the group space it belongs to, which in this case is Tony\_Notebook\_Discussions. That's fine for our purposes, but if you wanted to change the name, you could use the Edit icon (the little pencil) to do so.

Let's add a sample topic to get the discussion rolling.

19. Click **Create Topic**:

**Figure 4–21 Creating a Topic**



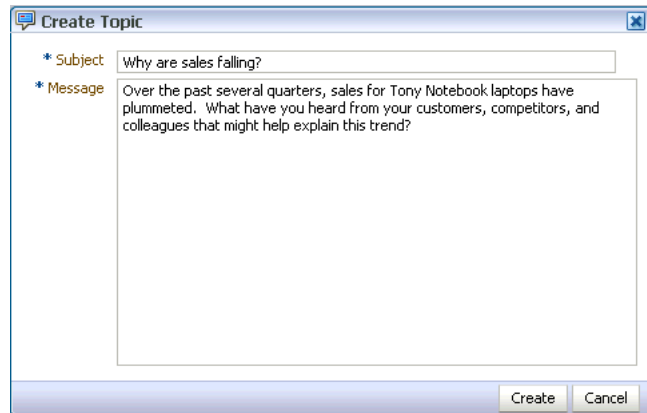
20. In the **Subject** field, type: Why are sales falling?

21. In the **Message** field, type:

Over the past several quarters, sales for Tony Notebook laptops have plummeted. What have you heard from your

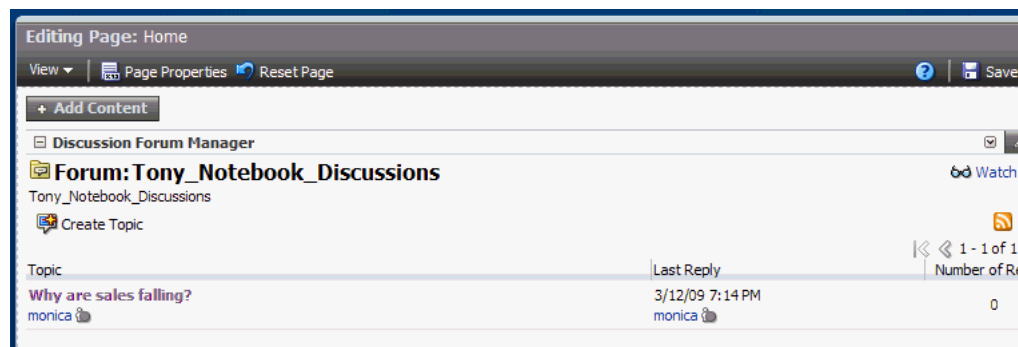
customers, competitors, and colleagues that might help explain this trend?

**Figure 4–22** *Creating a Topic*



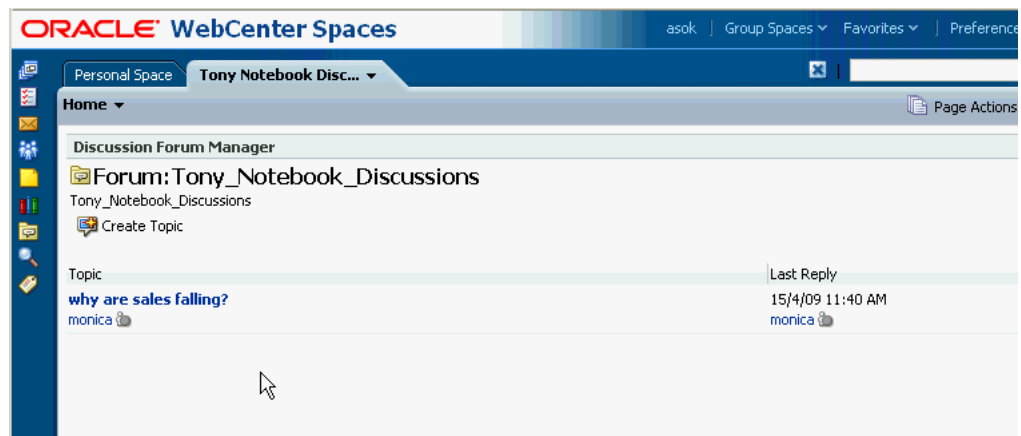
22. Click **Create**:

**Figure 4–23** *A New Topic in the Forum*



When unauthenticated users (those who do not have log in accounts for WebCenter Spaces) visit this instance of WebCenter Spaces, they'll see the Tony Notebook Discussions group space and have the ability to respond to this topic, as well as contribute topics of their own. Authenticated users will see the group space open alongside their personal space, as shown here for the user Asok:

Figure 4–24 Public Group Space Available to Asok



Before we leave this page, let's clean it up a bit and remove the standard text that was there before you added the discussions forum.

23. Place your cursor over the standard text until the action bar appears:

Figure 4–25 Creating a Topic



When you hover over the X, it becomes red.

24. Click the red X to remove the text, clicking **Delete** to confirm the removal.
25. Click **Close** to close this page, taking care to save your changes first.

So far you've created a group space, added members to it, set up a kick-off meeting, and made use of several key communications tools to ensure that group space members can share information freely. You've even created a discussions forum and opened it up to the entire company so that anyone with information pertaining to Tony Notebook sales can lend their perspective. Going back to Tony Notebook Sales, let's add one more thing to ensure that everyone is on the same page—an announcement.

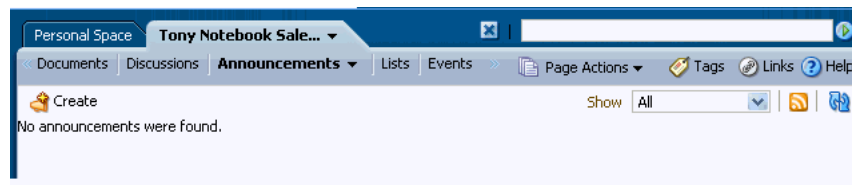
## 4.7 Step 7: Create an Announcement

You want to make sure everyone knows what's going on with the group space and the problem it was created to address by broadcasting the news to all members. *Announcements* are designed expressly for this purpose.

Although you can see the Announcements task flow on the Home page, you can't create announcements there—it's display only. The Announcements *task flow* on the Home page automatically displays all announcements created on the Announcements *page*. Only group space moderators can create announcements, to help you ensure that only truly important information is prominently advertised.

1. Click the **Tony Notebook Sales** tab, then the **Announcements** tab:

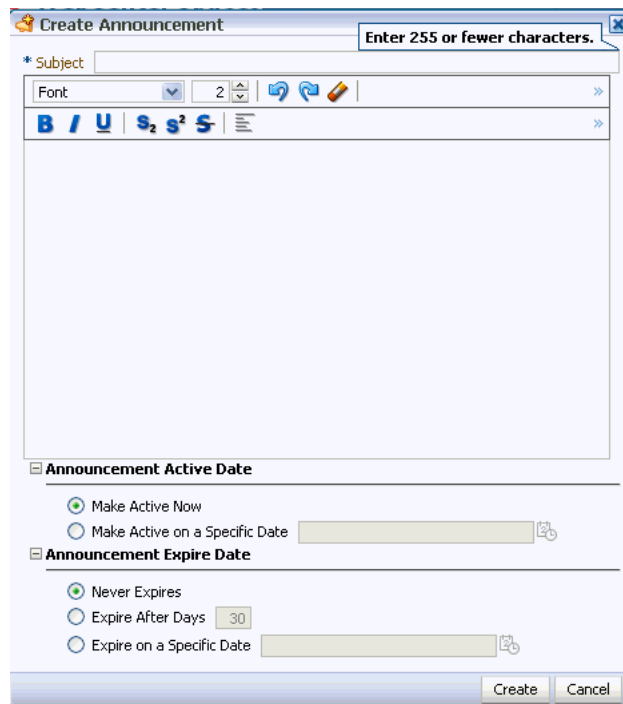
**Figure 4–26** *Announcements Page*



2. Click **Create**.

Your screen should look like this:

**Figure 4–27** *Create Announcement Dialog*



3. In the **Subject** field, type **Tony Notebook Sales: What Happened?**



4. In the composition area, type: Over the next few weeks, we need to figure out why Tony Notebook sales have taken a dive. Be sure to check the Tony Notebook Discussions group space to see what people inside and outside of Sales have to say.

Although you could specify a particular date on which you want to publish this announcement, in this case you want the announcement to be available immediately.

5. Leave the **Make Active Now** radio button selected.

You're not worried about the expiration date for this announcement, so you don't have to specify anything there.

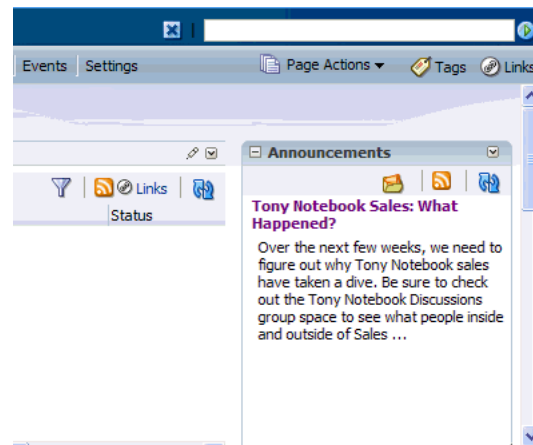
6. Click **Create**.

Let's check the Home page to verify that the announcement has been added there.

7. Click **Home**.

And there's the announcement, published right on the Home page:

**Figure 4-28** Announcement Published on the Home Page



Remember, the Home page is a convenient one-stop stop that reflects the content published through many services available within the group space.

You're finished setting up the group space, but now you'd like to set up some connections to the group space from your personal space so you can keep tabs on the progress more readily. Let's move on to the next chapter.



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## Keeping Yourself Informed

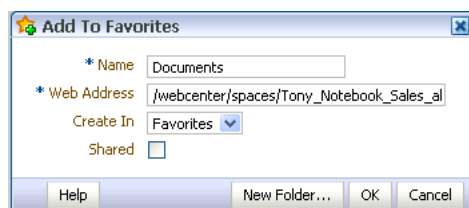
In this chapter you'll explore how to use your personal space, an area within WebCenter Spaces from which you conduct common business tasks that are regularly performed in any corporate setting. You'll see some ways to personalize your personal space, including how to keep a close watch on the group space you just created. You'll also make some changes to the business role page you created in the first chapter.

### 5.1 Step 1: Create a Favorite

To keep your finger on the pulse of the Tony Notebook Sales group space, you know you're going to be referring to the group space's Documents page pretty frequently, and most likely for the duration of this project. However, you don't spend all your time in the Tony Notebook Sales group space—you're in and out of different group spaces all day. To give you quick access to the Tony Notebook Sales Documents page no matter where you are within WebCenter Spaces, you decide to make the page a *favorite*. Favorites are an easy way to bookmark pages within WebCenter Spaces so you can return to them quickly.

1. Click **Tony Notebook Sales** to return to that group space, if you're not there already.
2. Click **Documents** to display that page.
3. At the top of your screen, click **Favorites**.
4. Select **Add to Favorites**.

**Figure 5-1** Add to Favorites Dialog



Because Documents is the current page, that's the one that will be added. You can see that the URL for the page appears in the **Web Address** field.

5. In the **Name** field, type Tony Notebook Documents.

If you had many favorites, you could use the **New Folder** button to help you create an organization system in which to store them. We won't do that now, however.

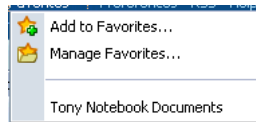
6. Click **OK**.

Favorites are automatically scoped to your personal space. That is, although you selected Favorites from the WebCenter Spaces Banner area, you are the only one who will see the favorites you choose.

Let's verify that this is the case.

7. At the top of your screen, click **Favorites**.

**Figure 5–2 Favorites List**



There's the Tony Notebook Documents favorite. When you click this link, you're automatically taken to the Documents page within Tony Notebook Sales from wherever you happen to be within WebCenter Spaces.

## 5.2 Step 2: Keep Track of Recent Activity

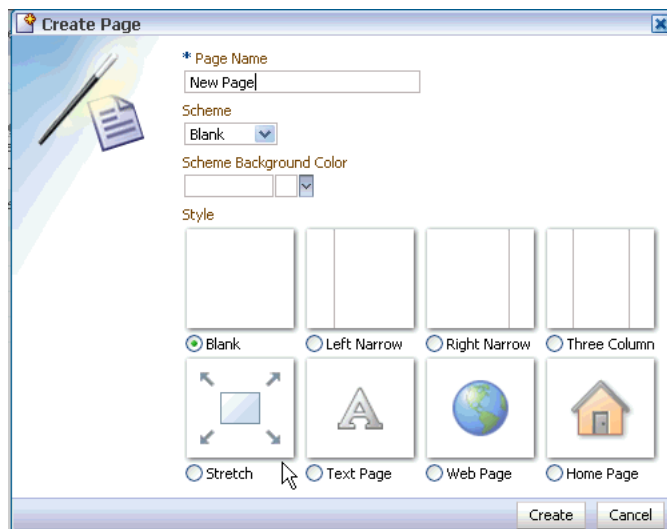
The problem with Tony Notebooks is a hot issue for Storefront, so you want to keep abreast of developments as they happen, without having to wait until the next status meeting, and without having to return to the group space to check the Recent Activity area on the Home page. To do that, you can drop the Recent Activity task flow onto a page within your personal space, which you access much more frequently.

1. Click **Personal Space**.

You don't currently have a page within your personal space on which it makes sense to place the Recent Activity task flow, so you decide to create one that you can use for all front burner issues.

2. Click **Page Actions->Create Page** to display the Create Page dialog:

**Figure 5–3 Create Page Dialog**



3. In the **Page Name** field, type `Hot Issues`.

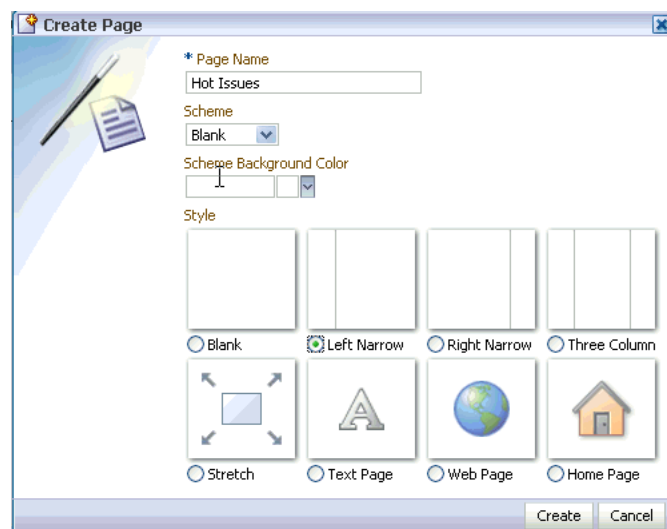
4. From the **Scheme** drop-down, select **Egg Shell**.

*Schemes* determine the background design for a page. For example, notice how the thumbnail layouts now reflect the visual effect of a lighter color gradating into the darker blue, as dictated by the Egg Shell scheme. Although the thumbnail layouts appear in blue, that's just an example. You select the actual color you want to apply to the background design with the Scheme Background Color field.

5. For the purposes of this tutorial we don't need a scheme or a background color, so return the value in the **Scheme** field back to **Blank**.

6. To select a layout for the page, click the radio button beneath the **Left Narrow** layout option:

**Figure 5–4** *Choosing a Layout for the Page*

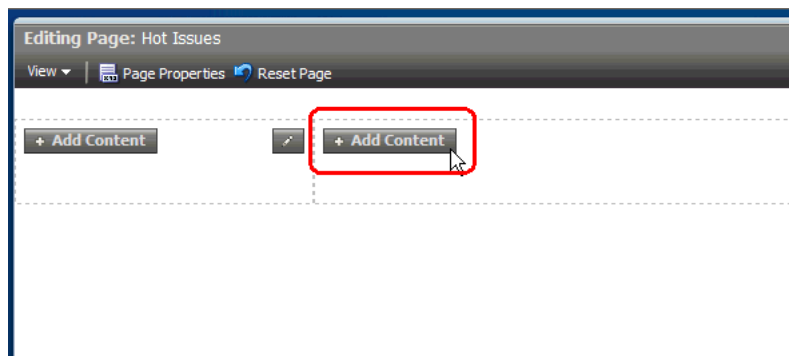


The Left Narrow layout gives you space to add a navigation bar along the left-hand side of the page, if you wish. If you decide you want to change the layout later, you can do that through WebCenter Space's page editing feature, which we'll see a little later.

7. Click **Create**.

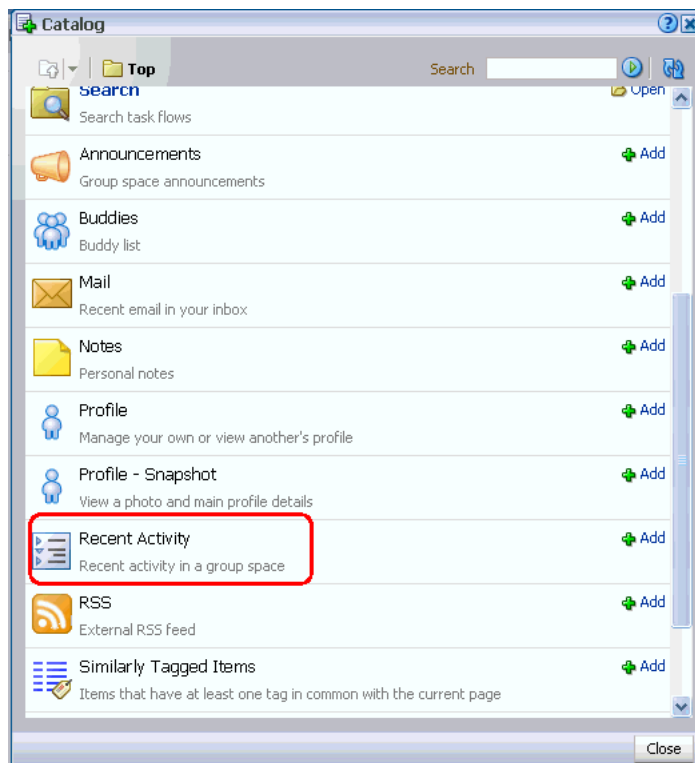
8. In the right-most region of the page, click **Add Content**:

**Figure 5-5 Adding Content to the Page**

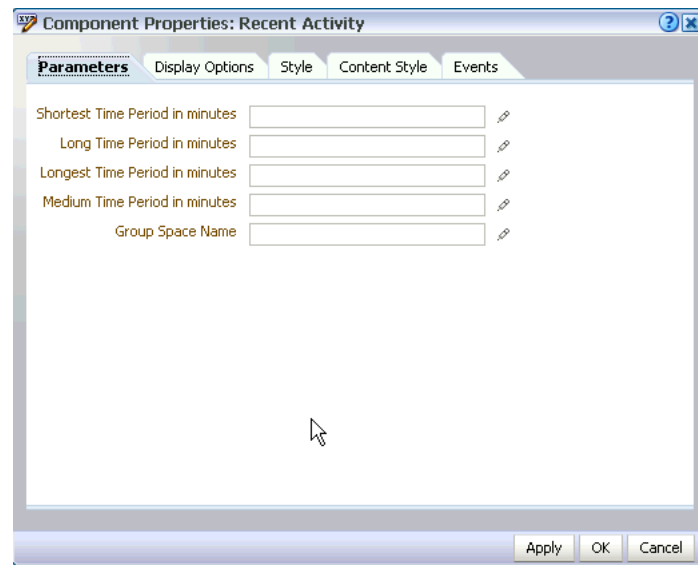


9. In the Catalog, scroll down until you see **Recent Activity**:

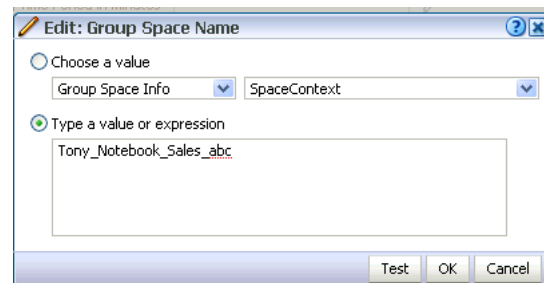
**Figure 5-6 Adding the Recent Activity Task Flow to the Page**



10. Click **Add**, then close the Catalog.  
Now you need to rewire the task flow so that it points to Tony Notebook Sales.
11. Click the **Edit** icon in the top right of the Recent Activity task flow.  
Your screen should look something like this:

**Figure 5–7** *Displaying Properties for the Recent Activity Task Flow*

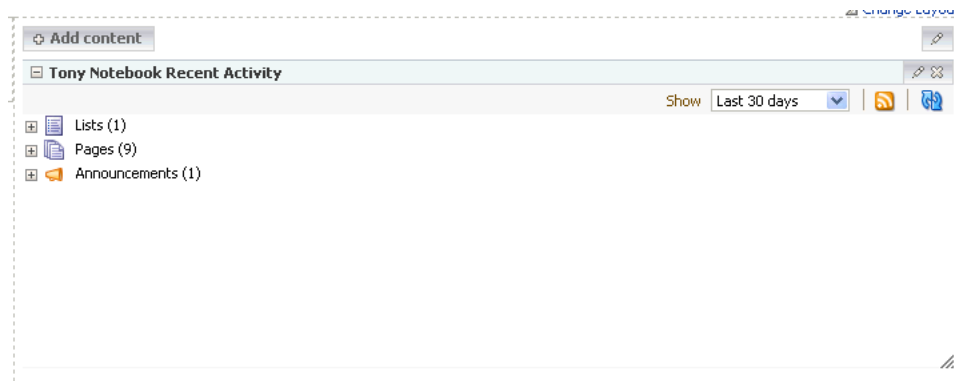
12. On the Parameters tab, click the Edit icon to the right of the **Group Space Name** field.
13. Click the radio button **Type a value or expression**, and type `Tony_Notebook_Sales_abc` in the space provided:

**Figure 5–8** *Wiring the Task Flow to Tony Notebook Sales*

Notice that you must replace spaces with underscores, and that `abc` should be replaced with the initials you used when the group space was created.

14. Click **OK** to return to the Component Properties dialog.  
Now we want to choose a descriptive name for the task flow, so you'll know immediately what you're looking at when you view this page within your personal space. This name will appear in the task flow's header.
15. Click **Display Options**.
16. At the bottom of the tab, type `Tony Notebook Recent Activity` in the **Text** field.
17. Click **OK**.

Looking at your page, you should see that the contents of the Recent Activity task flow has changed, presumably to reflect what's going on in the Tony Notebook Sales group space:

**Figure 5–9 Customized Recent Activity Task Flow**

18. Click **Save** to save your changes, but you can leave the page in editing mode for now.

Everything that appears in this task flow from now on will reflect the activity that occurs within the Tony Notebook Sales group space.

### 5.3 Step 3: Add an RSS Feed

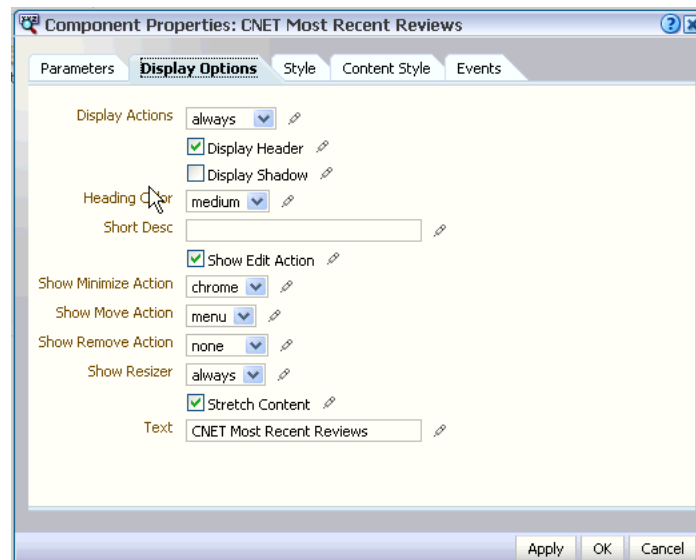
While you're making changes to your personal space, you may as well take care of a task you've been meaning to complete; that is, adding CNET's Most Recent Reviews RSS feed to one of your personal pages so you can see its content often. CNET is one of the most influential sites in the small electronics industry, so you'd like to keep abreast of what they have to say. For simplicity, you decide to place the feed on your recently created page, Hot Issues.

1. You should still be in edit mode for the Hot Issues page.  
This time let's put the task flow in the left hand side of the page.
2. In the left region, click **Add Content**.
3. Scroll down until you see RSS; click **Add**, then close the Catalog.  
The RSS Task Flow is added to the page. Now you have to point it to the source of CNET's Most Recent Reviews feed.
4. Click the **Edit** icon in the RSS task flow's header:



**Figure 5–10** Entering Edit Mode in the RSS Task Flow

5. In the **RSS Feed URL** field, type `http://reviews.cnet.com/4924-5_7-0.xml?orderBy=-7rvDte&maxhits=25&dedup=1&tag=rb_content;rb_mtx`
6. Click **Apply**.  
Now let's change the name of the task flow's header.
7. Click the **Display Options** tab.
8. In the **Text** field, type `CNET Most Recent Reviews`

**Figure 5–11** Changing the RSS Header

9. Click **OK** to save your changes and close this dialog.
10. Take a moment to review your changes, then click **Close** to exit the editing session, saving your changes when prompted.

Each time CNET publishes a new review, you'll see it in this task flow on your Hot Issues page.

RSS feeds are an excellent way to keep up with what's happening as it happens, both inside and outside of your company. You may want to create a page called RSS in your personal space that contains feeds for all the subjects you care about.

You're in pretty good shape in terms of personalizing your personal space so that it's displaying all the content you want to see. Let's log out so you can log back on as Zeba, who has some tasks to complete for the Tony Notebook Sales group space. Click **Logout** in the banner.

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## Working Within a Group Space

In this chapter you will complete the exercises as Zeba, the salesperson on Monica's staff who originally reported the problem with Tony Notebook Sales. As Zeba, you want to provide Monica and your fellow group space members with some data supporting your claim about Tony Notebook Sales. You've also gathered some information you think might prove useful in analyzing the source of the problem, and would like to present this data as a *list*. Finally, you'll create a personal page and see how you can share it with another WebCenter Spaces user. Along the way, you'll interact with several services that are indispensable to business users, working both collaboratively and as individuals.

### 6.1 Step 1: Log On

To log on as Zeba:

1. Click the **Login** link in the Banner area.
2. Enter the user ID Zeba.
3. Enter the password welcome1.
4. Click **OK**.

When you log on, you notice on your personal space Welcome page (in the Worklist pane) that you've been added as a member of the Tony Notebook Sales group space. You also notice the Sales page has been added your personal space; because you are a member of the Sales team, this page was automatically pushed to you when the WebCenter Spaces administrator assigned it to the Sales role.

The first thing you want to do is take a look at the group space and become familiar with what Monica's gathered already.

### 6.2 Step 2: Locate the Group Space

1. In the **Worklist** pane, click the notification that says you have been added to the Tony Notebook Sales group space.
2. Click **Acknowledge** to confirm your membership.

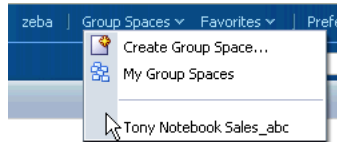
The Tony Notebook Sales group space opens.

Once you've acknowledged your membership, the notice disappears from your **Worklist** pane. How can you get to the group space in the future? WebCenter Spaces makes it easy for you to access the group spaces you use most often.

3. In the Banner, click **Group Spaces**.

Below the blue line, all the group spaces you can access (or have accessed recently) are listed, up to ten:

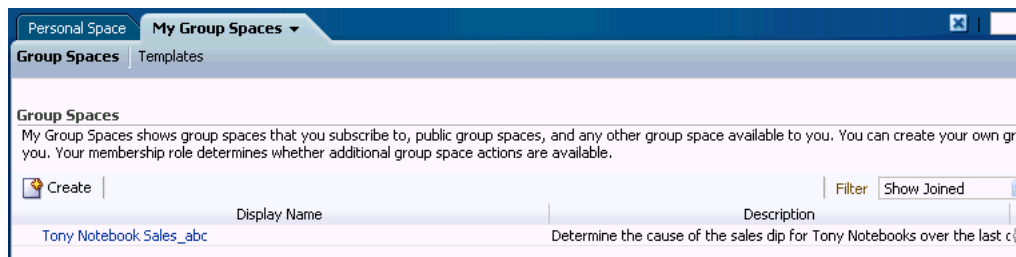
**Figure 6–1 Accessing Group Spaces**



This is a handy way to access your frequently used group spaces, but what if you belong to more than ten group spaces? Or what if you want to see what other group spaces are available in case you might want to request membership?

4. While the Group Spaces drop-down is displayed, click **My Group Spaces**.

**Figure 6–2 My Group Spaces**



Perhaps the most important thing about this tab is the **Filter** field. Right now it's displaying all the group spaces you belong to, which, at this point, is only Tony Notebook Sales. But by changing the value in this field, you can see all the group spaces you might *want* to join. Take a moment now to see how this tab allows you to see all public group spaces (which means anyone can see them, even people without a WebCenter Spaces log in), all discoverable group spaces (which means you might be able to request membership), and so on. There aren't many group spaces available now, of course, but you can easily see how My Group Spaces is an invaluable tool for making sure you have access to all the group spaces you need.

## 6.3 Step 3: Adding Documents to the Group Space

Let's get back to the problem with Tony Notebooks. The first thing you need to do is present the evidence backing up your claim that there's something wrong with Tony Notebook sales. You have two charts that will help you do this: BIchart1.jpg and BIchart2.jpg. These will help acclimate other group space members to the trends you've noticed and get them thinking about where the problem may lie.

1. In Tony Notebook Sales, click **Documents**.

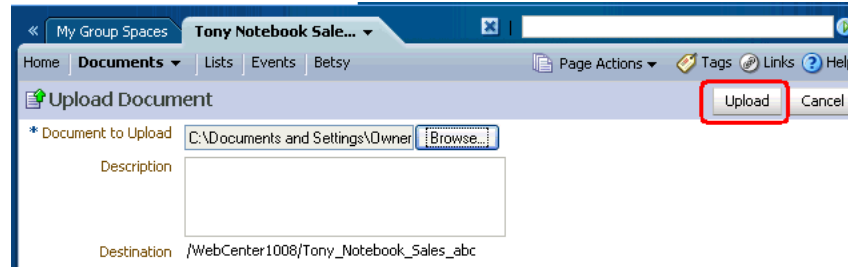
The Documents page you are now viewing displays (or will display) all documents that pertain to the Tony Notebook problem. The Documents page in your personal space, by contrast, lists documents that you have explicitly uploaded to your personal library. And you may have noticed that your Sidebar also contains a Documents pane; that pane lists *all* the documents you have recently accessed, regardless of where those documents reside.

2. Click **Upload**.

Use the **Browse** button to navigate to B1chart1.jpg. This chart should be on the server identified by your WebCenter administrator.

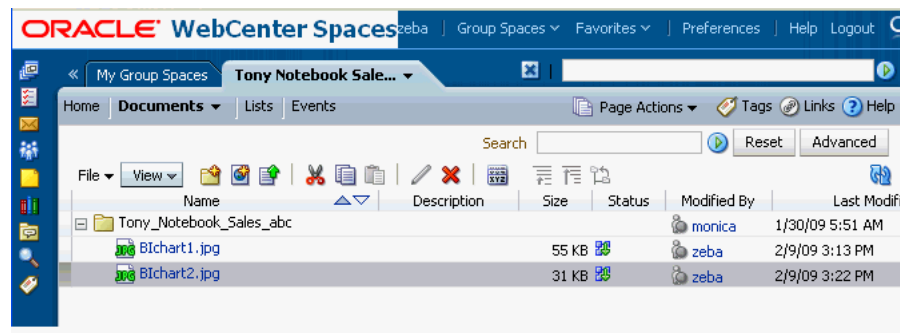
3. Click **Upload** in the far right of the Upload Document screen.

**Figure 6–3** Uploading B1chart1.jpg



4. Repeat this process to upload B1chart2.jpg.  
When you're finished, the Documents page should look something like this:

**Figure 6–4** Charts Uploaded to the Group Space



5. Click **B1chart1.jpg** to display it.  
The chart opens in another browser window.
6. Return to WebCenter Spaces and click **B1chart2.jpg** to display it.

Yes, both charts should help illustrate the problem so that the other group space members can see it clearly.

## 6.4 Step 4: Create a List

You've done some research on the Tony Notebook problem by collaborating with the Customer Support department. Specifically, you've asked them to gather information on the top questions submitted by customers concerning the Tony Notebook laptop through customer discussion forums, call logs, and trade shows. You're now ready report your findings to the other group space members, so you decide to create a *list*. A list is just one of the ways you can organize and present information in WebCenter Spaces.

1. In the Tony Notebook Sales group space, click **Lists**.

On the Lists page, the far left panel displays all the current lists (Project Issues is created by default for each project group space). When you select a list, its content displays in the right-hand panel.

- In the Lists panel, click **Create a new list**, as shown in [Figure 6-5](#):

**Figure 6-5 Create List Icon**



- In the **Name** field, type `Customer Questions`.
- Leave the **Description** field blank.
- Click the arrow in the **Template** pull-down to display the options available.

There are four different types of lists to choose from. Although three of the lists contain pre-populated columns, you can always change the names of those columns if you wish.

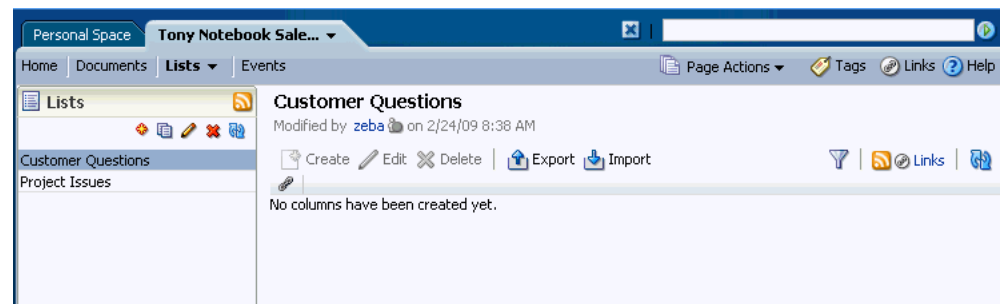
**Table 6-1 Types of Lists**

List Type	Description
Custom List	Enables you to create your own columns.
Issues	Contains four columns: Subject, Assigned To, Closed, and Comments. An Issues list (called Project Issues) appears on each group project's Home page by default, including Tony Notebook Sales.
Milestones	Contains three columns: Date, Description, and Status.
Objectives	A simple list, appropriate in many different situations. Contains just two columns: Title and Description.

- You want to create your own columns, so select **Custom List**.
- Click **OK**.

Your screen should now look like this:

Figure 6-6 Creating a Custom List

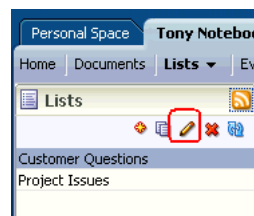


You want your list to have four columns to relate the following information: row number (number), customer's question (string), how many customers asked this question (number), and whether the question was one of the top five questions asked in the previous quarter (Boolean).

Let's create the first column now.

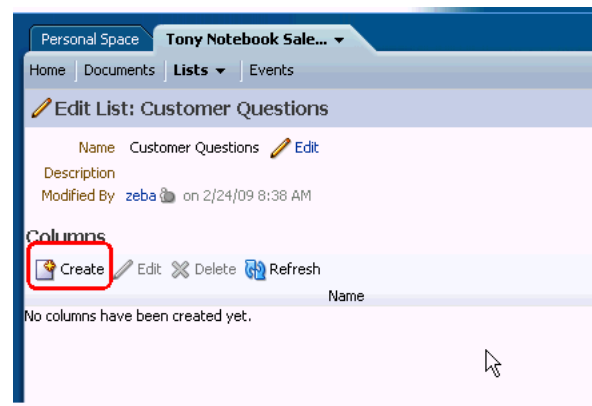
8. In the Columns panel, make sure Customer Questions is highlighted, then click **Edit list**:

Figure 6-7 Adding a Column to a List



9. Under Columns, click **Create**:

Figure 6-8 Creating a Column



10. To create the first column, the number of the row, fill in the values as shown in Figure 6-9:

**Figure 6–9 Creating the Number Column**

column.

Column: Number

\* Name

\* Data Type

Required

\* Format

Default Value

Minimum Value

Maximum Value

11. Click **OK**.

On the left side, you can see that the first column, Number, has been added.

12. Follow steps 8-10 for the remaining three columns, using the column names and data types shown in [Table 6–2](#):

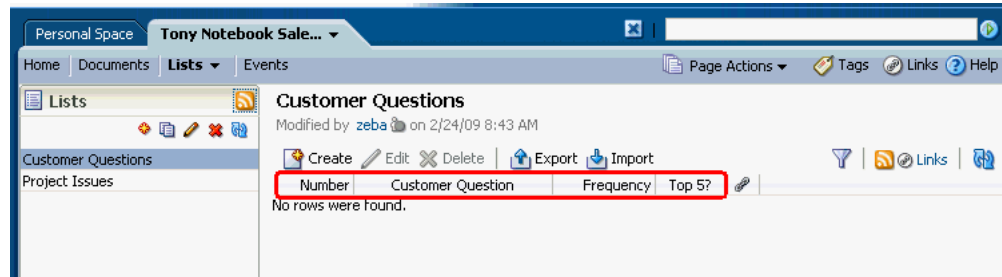
**Table 6–2 Columns to Add to the List**

Column Name	Data Type
Customer Question	String
Frequency	Number
Top 5?	Boolean

13. When you’ve finished adding all the columns, click **Close** in the upper right corner.

14. The final order of the columns should look like this:

**Figure 6–10 Final Column Order**

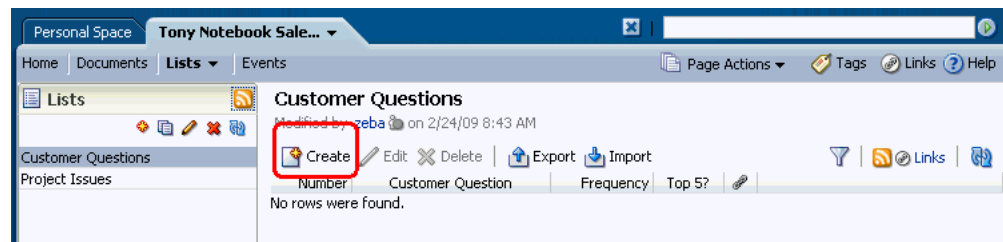


For the purposes of this scenario, we’re not going to populate this list with all the customer questions. We’ll just add one of the top five, to give you an idea of how list data is supplied.

15. To add the first row, click **Create**:



Figure 6–11 Adding A Row to the List



Four fields appear in which you can enter data, one field for each column in the list.

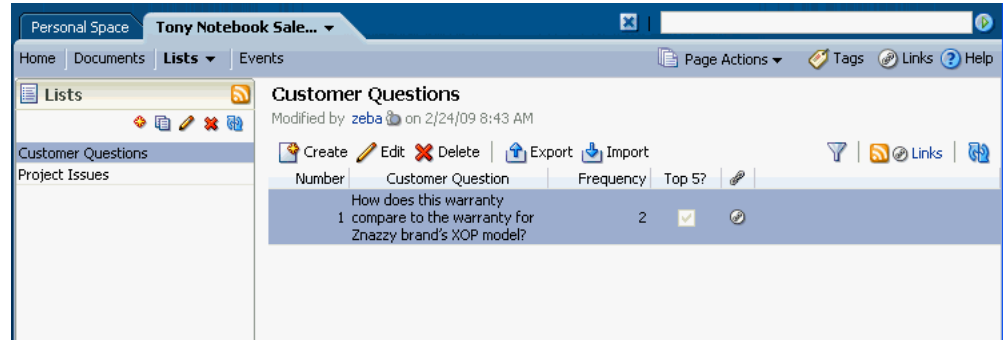
16. Enter some dummy data in the fields as follows:

- **Number:** 1
- **Customer Question:** How does this warranty compare to the warranty for Snazzy brand's XOP model?
- **Frequency:** 2
- **Top 5?:** check

17. Click **Save**.

Your screen should now look like this:

Figure 6–12 First Row Added to the List



You may have noticed the last column in your list (after Top 5?), the **Links** column. Links give you the ability to associate a question with a particular document. We'll experiment with links later, in [Chapter 8, "Helping Others Find Your Content"](#).

## 6.5 Step 5: Drop the List on a Page

Although all group space members can see this list by going to the Lists page, you want to give it even more visibility by placing it on a page within the group space. You decide to create a page called Data to contain this list, as well as other relevant data you might collect.

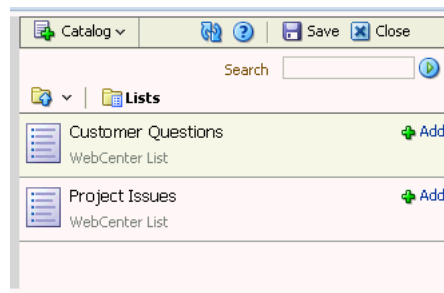
1. Click **Page Actions->Create Page**.

Because you're still in Tony Notebook Sales, the page will be created as part of that group space.

2. In the **Name** field, type `Data`.
3. Leave the **Scheme** and **Scheme Background Color** fields defaulted.
4. Select the **Blank** page style.
5. Click **Create**.
6. When you're in edit mode, click **Add Content**.
7. In the Catalog, click **Lists** to display all the lists that have been created for this group space:
 

If you clicked List Manager, you'd be adding the task flow that allows others to create lists. Instead, you want to add the list you just created, `Customer Questions`.
8. Click **Lists**.
9. Next to **Customer Questions**, click **Add** (Figure 6–13):

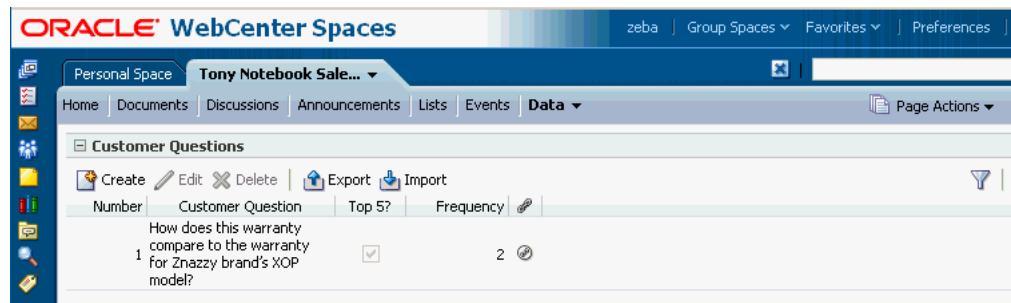
**Figure 6–13 Adding Customer Questions to the Page**



10. Close the Catalog.
11. Click **Close** to exit edit mode, taking care to save your changes.
 

Your screen should now look something like this:

**Figure 6–14 Data Page**



Of course, the page looks a little thin now, since it just contains the `Customer Questions` list, but it's a good start.

Now that that's done, you can start concentrating on conducting the necessary research to uncover the source of the `Tony Notebooks` dip in sales.

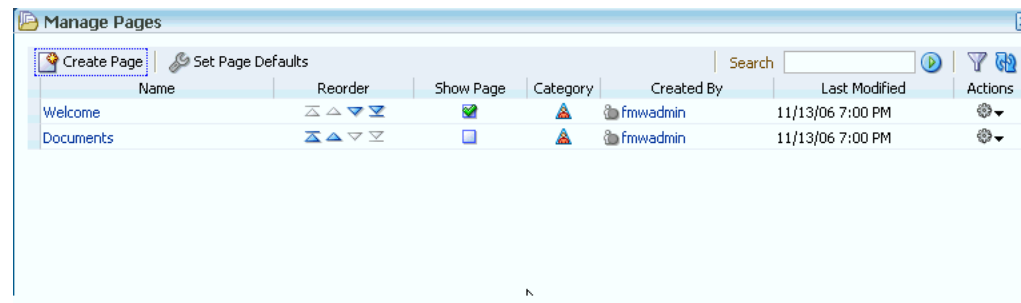
## 6.6 Step 6: Create a Personal Page

After a fair bit of research, you've developed a theory about what might be causing the problem with Tony Notebooks sales, but you're not sure that Monica would want you to publish it to the entire group space without her approval. You decide to first upload the data to a page within your personal space and let Monica take a look at it before making it public. Because personal space pages are private, however, you'll need to take some steps to make sure that Monica can view the data you're planning to provide.

The first thing you want to do is upload a document from your desktop to your Personal Documents folder. To do that, you'll first need to expose the Documents page in your personal space.

1. Click **Personal Space**.
2. Click **Page Actions->Manage Pages**:

**Figure 6–15** *Manage Pages Dialog*

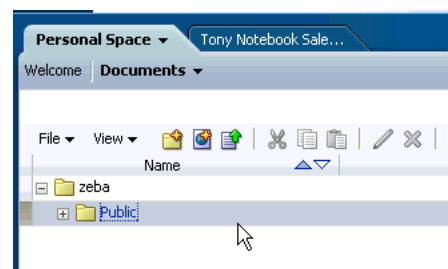


3. In the Documents row, click **Show Page**, then click **Close**.
4. In your personal space, click **Documents** to display that page.

If you plan to share a document with others, you must ensure that the document resides in your Public folder. If you placed a document from another folder on a page, while others could see that the document was there, they wouldn't be able to open it.

5. Click the **Public** folder to highlight it:

**Figure 6–16** *Highlighting the Public Folder*



6. Click the **Upload document** icon.

For the next step, you can upload any file you have available to you. The purpose of this step is to illustrate how to make a personal page available to other users, so the content that's on the page is not important.

7. Use the **Browse** button to locate a file on your desktop and click **Upload**.

Now we're ready to create the page and place the document on it.

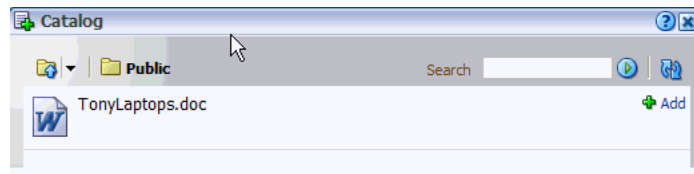
8. In your personal space, click **Page Actions->Create Page**.
9. In the **Name** field, enter `Sales Problem`.
10. Leave the other settings defaulted and click **Create**.
11. When you're in edit mode, click **Add Content**.
12. In the Catalog, click **Documents**.

Because you're the one creating this page, the Public folder automatically contains the same documents as you saw on the Documents page in your personal space. In this context, however, your documents are displayed as content "building blocks" with which you can build your page, as opposed to content that you peruse in order to complete a given task.

13. Click **Personal Documents**, then **Public**.

You should see the document you uploaded in step 6:

**Figure 6-17** *Uploaded Document*

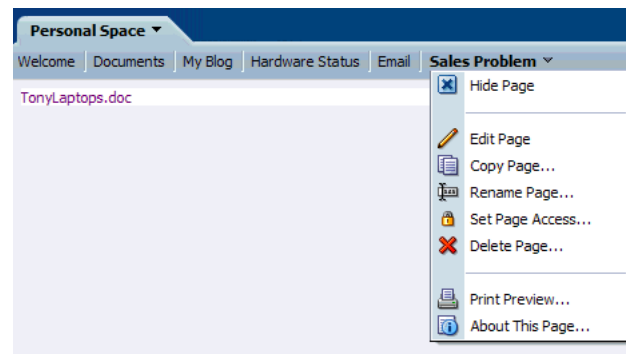


14. Click **Add**, then close the Catalog.
15. Click **Close** to exit edit mode, taking care to save your changes.

## 6.7 Step 7: Make the Page Available

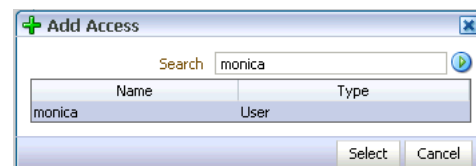
The page is complete, but because it was built in your personal space you have to explicitly share it with others—in this case, Monica.

1. Click the arrow beside the page name (`Sales Problem`) to display the action menu:

**Figure 6–18 Page Action Menu**

Take a moment to look at the list of things you can do on this page. This is where you hide a page if you don't want to display it, delete the page, print it, and so on.

2. Click **Set Page Access**.
3. On the Set Page Access dialog, click **Add Access**.
4. In the **Search** field, type *Moni ca*, then click the Search button.
5. Highlight *Monica* and click **Select**:

**Figure 6–19 Adding Monica As a Viewer**

By default, Monica is added as a viewer, which is fine for your purposes.

6. Click **OK** to close the Set Page Access dialog.

Better send an email to Monica to let her know that you've created this page and what you want her to do with its content.

## 6.8 Step 8: Send an Email

WebCenter Spaces makes it easy to send email from your Sidebar. Let's take a look at this now.

1. If your Sidebar is expanded, you should already see your Mail pane. If it is not, click the **Personal mail inbox** icon, as shown:

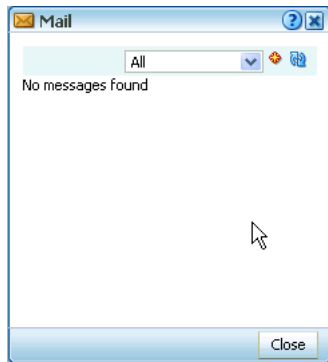
**Figure 6–20 Expanding the Mail Pane**



2. In the Mail pop-up, click **Login to Mail**.
3. Log in to the Mail server using the log in ID and password you get from your WebCenter administrator.

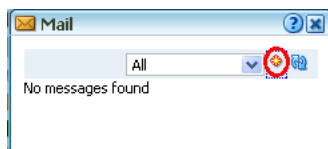
Your screen should now look like this:

**Figure 6–21 Mail Sidebar Pane**



4. Click the Compose icon, circled in [Figure 6–22](#):

**Figure 6–22 Compose Icon**



5. In the **To:** field, enter Monica’s email address. (You can get this information from your WebCenter administrator.)
6. In the **Subject** field, type: Please Approve
7. Enter some quick text to tell Monica what you’d like her to do, something like:

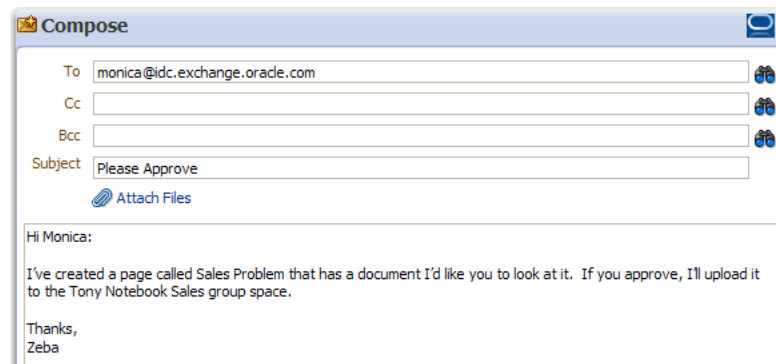
Hi Monica:

I’ve created a page called Sales Problem that has a document I’d like you to look at it. If you approve, I’ll upload it to the Tony Notebook Sales group space.

Thanks, Zeba

Your screen should look similar to the one shown here:

**Figure 6–23** *Composing an Email*



**8. Click Send.**

When Monica logs on, she'll see your email in her Inbox. We'll see this in action in the next chapter.

Your work as Zeba is now complete, so click **Logout** in the banner. Time to move back to Monica to see how she interacts with the page you surfaced to her.





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## Working in Your Personal Space

It's one thing to see Zeba make a page available to Monica and send her an email, but if you see how Monica responds to them you'll have a better idea of the kind of interaction that WebCenter Spaces makes possible. That's why we're going to log back in as Monica in this chapter. We'll also see Monica use her personal space to complete some additional commonly performed business tasks.

### 7.1 Step 1: Log On

To log on as Monica:

1. Click the **Login** link in the Banner area.
2. Enter the user ID `Monica`.
3. Enter the password `welcome1`.
4. Click **OK**.

### 7.2 Step 2: Create a Personal Note

On the drive into work this morning, you were thinking about the meeting you're going to have with your boss, Bill, later in the week, and reviewing in your mind some key points you want to relate to him regarding an upcoming sales deal. To make sure you don't forget the points you want to make, you decide to quickly create a *personal note*. Personal notes allow you to jot down snippets of text that are for your eyes only: memory jogs for upcoming meetings, personal items such as grocery lists, a phone number you don't have time to add to your address book—anything that doesn't require lengthy prose to be useful.

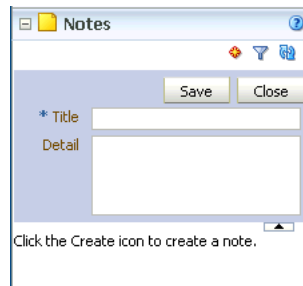
1. If your Sidebar is expanded, you should already see your Notes pane. If it is not, click the **Personal notes** icon:

**Figure 7-1** Personal Notes Icon



2. Click the **Create a new note** icon.  
Your Notes pane should look like this:

**Figure 7-2 Notes Pane in the Sidebar**



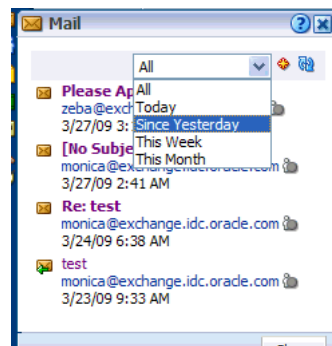
3. In the **Title** field, type `Notes for Meeting w/Bill`.
4. In the **Text** field, type the points you want to make:  
`Deal with ZapIt has hit a snag`  
`Dave Smith to fly out to ZapIt HQ next week`  
`May need Bill to participate in con call`
5. Click **Save**.  
Beneath the text fields, you should now see "Notes for Meeting w/Bill". To display the details of a note, just click the note title. The details appear in the **Notes** pane.
6. Click **Close**.

If you create a lot of notes, managing them can be somewhat challenging. The Filter Notes icon is provided as a means for you to locate a particular note by its title. We won't try this here, but you may want to experiment with it another time.

### 7.3 Step 3: Read an Email

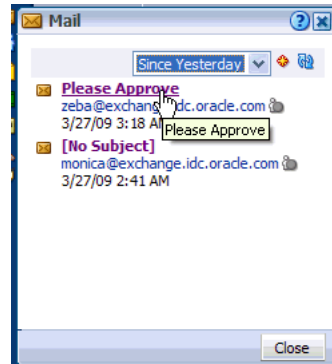
Now it's time to take a look at the mail that has accumulated since last night. You don't have to go outside WebCenter Spaces to access your email; your Sidebar conveniently contains a window into your personal account.

1. In the Sidebar, click the expand node beside the **Mail** pane (or, if the Sidebar is minimized, click the **Personal mail inbox** icon).
2. If you are prompted to do so, enter your user ID and password. (You can get this information from your WebCenter administrator.)
3. You want to be sure you are looking at just the mail from last night, so select **Since Yesterday** from the drop-down (Figure 7-3):

**Figure 7-3 Looking at Mail Received Since Yesterday**

Now you won't be distracted by older emails awaiting your reply.

4. You see you have an email from Zeba, so you click the subject line to open it:

**Figure 7-4 Reading an Email**

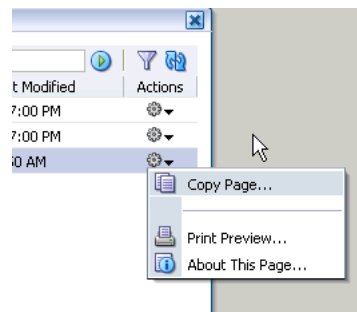
You've read Zeba's email and learned that she's made a page called Sales Problem available to you, which means you must make it visible within your own personal space. In the meantime, close this email so you can respond to it later.

## 7.4 Step 4: View a Shared Page

As we saw in the last chapter, the Manage Pages dialog helps you keep track of which pages are displayed, the order in which they are displayed, and so on. Because you know that Zeba gave you permission to see the Sales Problem page, you need to go to Manage Pages to make it visible.

1. In your personal space, click **Page Actions->Manage Pages**.
2. In the Sales Problem row, click the arrow in the Actions column to see what permissions Zeba has granted to you:

Figure 7-5 Viewing Your Page Privileges



The number of actions here is fairly limited, so it looks like you have view access only. If Zeba had granted you edit privileges, you'd see the Edit Page action, and if you had manage privileges on the page you'd see things like Set Page Access, Delete Page, and so on.

Let's display the page now.

3. In the **Show Page** column, click the check box on the Sales Problem row.
4. Click **Close**.

The page now appears alongside the other pages within your personal space.

Note: In the real world, Zeba would have most likely provided the URL for the page (which is listed in the **About This Page** pop-up), so you could just click it or enter it in your browser's Address field to display the page. However, now you know what to do when you want to see a shared page and *don't* have the page's direct URL.

Looking at the data on Zeba's page, you see that she's hit upon the source of the problem with Tony Notebook Sales. It turns out that Tony Notebooks, as well as most of the other notebook brands, have been offering a six month warranty—until recently. All other competitors recently raised their warranties to two years, but Tony Notebooks still offers the low warranty period of six months. Tony Notebooks will be contacted later today and advised that this discrepancy is negatively impacting their sales. In the meantime, you want to quickly let Zeba know that she's solved the problem, and give the go-ahead for her to post her document to Tony Notebook Sales. While you could do this through email, the fastest way to interact with a colleague is, of course, through online chat.

## 7.5 Step 5: Start a Chat

WebCenter Spaces provides presence information so you can tell who's online, as well as an online chat service so you can send people messages and get a response quickly. Anywhere you see a user's name displayed within the WebCenter Spaces interface, you'll also see a presence icon beside it that indicates whether the person is online. You can use that icon to start a chat anytime you wish.

1. In the Sidebar, click the expand node beside the **Buddies** pane (or, if the Sidebar is minimized, click the **Buddies** icon).

The Buddies pane lists all the people that you have explicitly added to your buddy list in your email client. Names that appear with a colored icon beside them are online and available; names that have a grayed-out icon are not currently online.

We can't initiate an actual chat in this tutorial, since you can't be two members at once, but if Storefront was a real company you could start a chat simply by right-clicking Zeba's name. If you try to initiate a chat with someone who is not logged on, they will be prompted to do so through Microsoft Live Communication Server (or through Oracle Communication Server, depending on which email server they're using). The person has the option of whether to log in at that point.

Let's quickly simulate a chat session.

2. Highlight Zeba's name, then right-click.

A list of available actions displays.

3. Click **Send an Instant Message**.

Your chat client (Oracle Communicator) launches and displays a Chat window.

4. In the Chat window, type a message.

5. Click **Send**.



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## Helping Others Find Your Content

The source of the problem has been identified: Tony Notebook's warranty period is too low. Tony Notebook's competitors expanded their warranties during the last quarter, while Tony Notebook's policies remained static. This could easily explain why sales took a nose dive during that period. You realize that this issue could affect other lines of business besides Sales, and want to make the information readily available to other Storefront employees. Let's examine a couple of ways you might accomplish this: linking and tagging.

### 8.1 Step 1: Create a Link

Links are an effective way of associating related information within a group space. For example, you can use a link to associate a discussion thread originating from a customer to a document that supports his or her claim. For the purposes of this exercise, let's assume that the page Zeba created in [Section 6.5, "Step 5: Drop the List on a Page"](#), contains more relevant information than just the list she assembled to complete her task. You want to create a link from the Data page to the kick-off meeting you scheduled for tomorrow, so that people can review the information before the meeting.

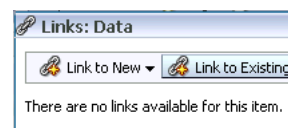
1. Click **Tony Notebook Sales**, then click **Data**.
2. In the page header, click **Links**:

**Figure 8-1** Setting a Link for the Page



The Links pop-up displays:

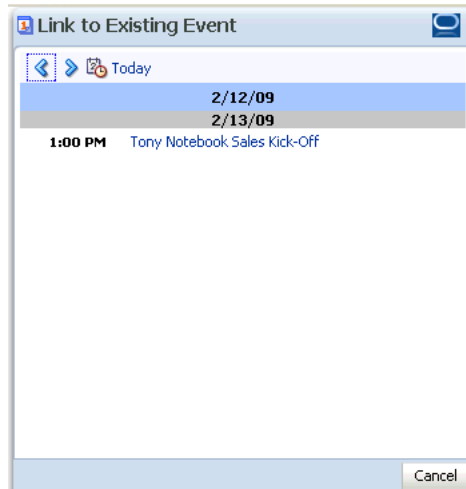
**Figure 8-2** Establishing a Link



3. You want to link to an event that has already been created (as opposed to creating one now), so click **Link to Existing**.

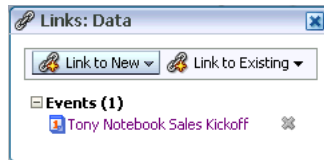
4. From the drop-down, select **Event**.
5. In the **Link to Existing Event** window, click the kick-off meeting to select it:

**Figure 8–3 Linking To an Event**



As soon as you click the event, it appears in the list of links established for the page:

**Figure 8–4 Data Page Linked to the Sales Kick-Off Event**

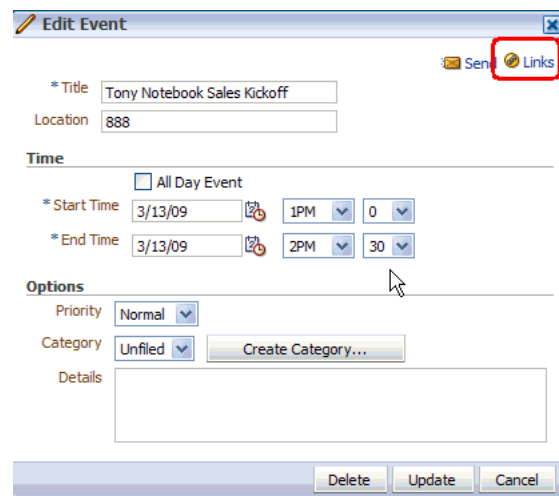


6. Close the Links pop-up.

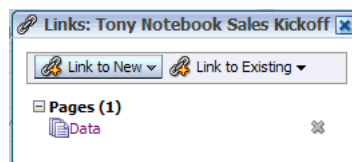
How will your group space members know that this link has been established? By checking the Links icon at either end of the link. That is, when a group space member goes to the Data page, he or she may notice that the color of the Links icon has changed from gray to gold. That indicates that a link has been established for the page. Clicking **Links** displays the pop-up shown in [Figure 8–4](#).

A user could also display the link by going to the Events page (or the Events area of the Home page), clicking the Tony Notebook Sales Kick-Off event, and clicking **Links** in that pop-up:



**Figure 8–5 The Other End of the Link**

Clicking the **Links** icon in the Edit Event pop-up displays information on the link from the perspective of the event (that is, *to* the page):

**Figure 8–6 The Link From the Event's Perspective**

It's important to check Links frequently as you move throughout WebCenter Spaces, so you can be sure you're accessing all the information relevant to a given topic.

7. Click the **X** in the upper right corner of the **Links** window to close it, then **Cancel** to exit **Edit Event**.

Let's move on and see how you might give the Customer Questions list even greater exposure in the Tony Notebook Sales group space.

## 8.2 Step 2: Tag a Page

*Tagging* is a powerful social networking feature that allows you to label a page with a word or phrase. When someone performs a search, the tags are matched against the search term just as other search criteria would be, thus ensuring that the content is surfaced.

Let's use the Data page again for this exercise. You want to attach some tags to the Data page so that anyone searching on the terms "warranty", "Tony Notebooks" will receive a link to the page in their search results.

1. In Tony Notebook Sales, click **Data** to display that page.
2. In the page header, click **Tags**:

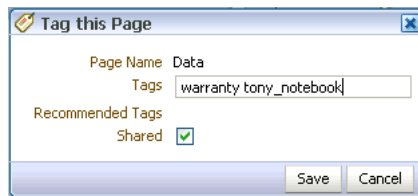
**Figure 8-7 The Tags Link**



Because Data is the current page, that's the page that will be tagged.

3. In the **Tags** field, type `warranty tony_notebook`, separating each term with a space. Joining the words `tony` and `notebook` with an underscore indicates that it is a single term.

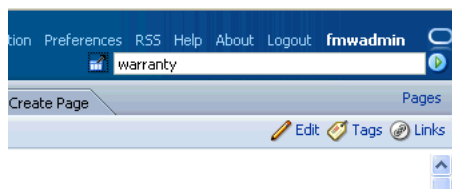
**Figure 8-8 Tagging a Page**



By leaving the **Shared** check box selected, you make this page available to other users when they search on the associated tags. That is, if someone at Storefront, Inc. searches on the term `warranty`, the Data page will appear in their search results (assuming that they have view privileges on the page, that is). You can keep a tagged item for your eyes only by clearing the **Shared** check box.

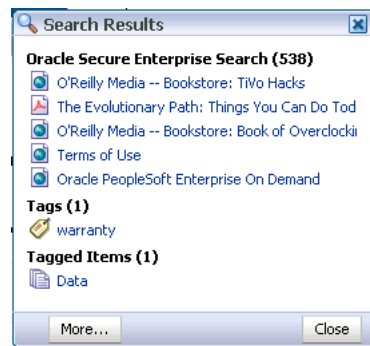
4. Click **Save**.  
Let's test this tag to make sure it worked.
5. Click **Personal Space** so we can launch the search from outside of this group space.
6. In the search field (located in the Banner), type `warranty`, then click the arrow icon at the end of the field:

**Figure 8-9 Testing the Warranty Tag**



A pop-up displays with your search result:

Figure 8–10 Search Results Pop-Up

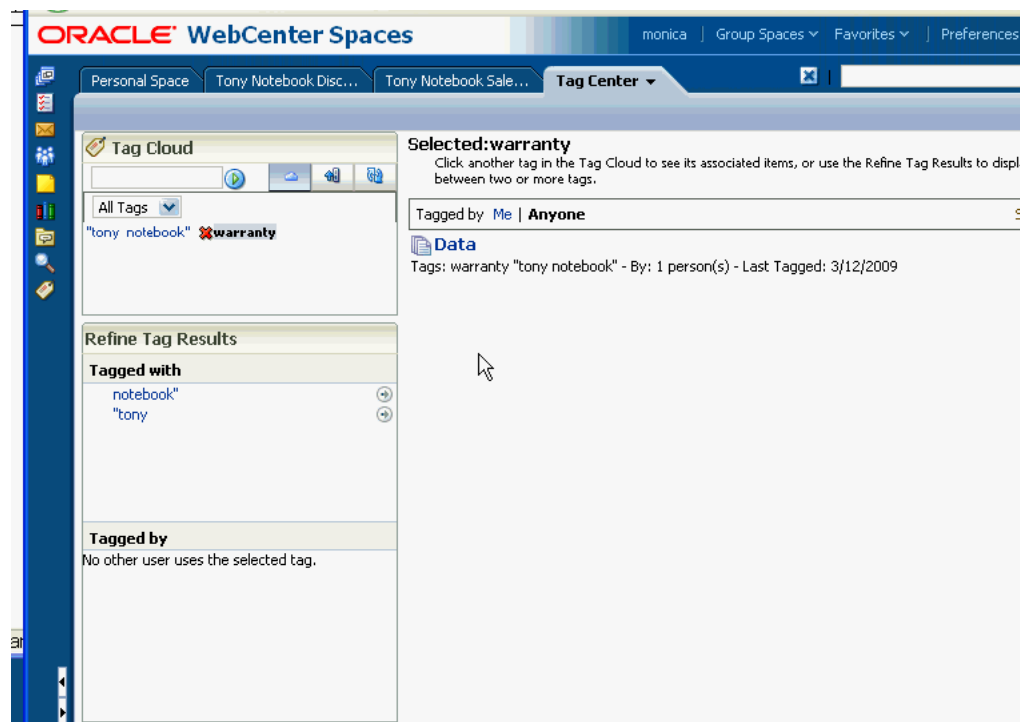


Notice that the results are grouped into three categories: items returned by Oracle Secure Enterprise Search that matched the search criteria, the tag `warranty` and the number of objects that were tagged with this word (1), and the items that were actually tagged with `warranty`, which in this case is the `Data` page.

7. Under **Tags**, click `warranty`.

The Tag Center opens, as shown in Figure 8–11:

Figure 8–11 Tag Center



The Tag Center gives you lots more information about the `warranty` tag and where it appears. You can see a list of all tags in this WebCenter Spaces instance, or just the tags that you created. You also get to see how exactly the `warranty` tag appeared when it was employed on the `Data` page (the term "Tony notebook" was specified as well), as well as a link to the objects tagged with the word `warranty`. The Tag Cloud, in the upper left pane, is a visual depiction of all the tags used within your WebCenter Spaces application, subject to the filter you

apply through the drop-down list. More frequently used tags display in bold fonts and varying font sizes, the larger the font, the more often the tag has been applied to WebCenter Spaces items.

The Tony Notebook problem has been resolved. Now turn the page to examine some ways you can use WebCenter Spaces to communicate with others who share your interests *outside* of work.

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## Creating a Community of Interest

Now that the crisis with Tony Notebooks has been resolved, you can turn your attention to less weighty matters. One of your hobbies, which happens to be tangentially related to your job, is keeping up with the latest advancements in the world of personal electronics. You know that others at Storefront share your passion, so you'd like to set up some kind of forum in which you can communicate with other technophiles about the current hot items in the marketplace—rumors about company mergers, confirmed announcements about upgrades or new products, and so forth. WebCenter Spaces offers just the thing to make this notion a reality: a *community of interest*.

As you may recall, a *community of interest* supports the needs of people who want to share information on a given topic, as opposed to collaborating to achieve a goal or complete a project. For example, the Community of Interest template automatically gets its own category under the root discussions forum category, which allows you to create multiple discussion forums to support many different simultaneous discussions. The Group Project template, by contrast, is designed to support a single project, and therefore allows you to create just a single discussion forum.

Let's see how you can use a WebCenter Spaces group space template to create your own community.

### 9.1 Step 1: Create a Community of Interest

WebCenter Spaces provides a template that contains everything you need to facilitate communication among a group of people who share a common interest.

1. In the Banner, click **Group Spaces->Create Group Space**.
2. In the **Group Space Name** field, type `Technophiles`.
3. From the **Group Space Template** drop-down, select **Community of Interest**:

Figure 9–1 Creating a Community of Interest

4. You'll need to set the permissions for this group space so that others can participate in it, so click **Let me add members**.
5. Click **Create**.

Let's spend a few moments thinking about how best to manage the membership of a community of interest. Unlike a project group space, in which the members are known and finite, a community of interest group space based on such a general topic may well attract a wide audience of virtually unlimited membership. As the creator and moderator of this group space, you don't have the time or inclination to review and accept every single request for membership. Instead, you'd like to set things up so that 1) other users can find out that the group space exists, and 2) interested parties can grant themselves membership without you ever having to lift a finger.

## 9.2 Step 2: Manage Membership

Let's configure this group space so that it has the accessibility and membership options you want.

1. Within the Technophiles group space, click **Settings->General**:

Figure 9–2 General Tab Under Settings

Looking at the fields on the General tab, you can see that **Allow WebCenter Users to Discover the Group Space** is already selected—in other words, others can see your group space on their My Group Spaces dialog, provided they change the filter to **Show Discoverable**. This is also where you take the group space offline, should you need to work on it for awhile, and where you can close the group space when it has outlived its usefulness.

Now you need to set up the subscription rules for the Technophile group space so that people can become members. You're fine with people joining the group space as **Viewers** or **Participants**, but you do not want anyone other than you to assume the role of **Moderator**.

Subscription rules are set up on the **General** tab, which should still be displayed.

2. Under **Self-Subscription/Change Management**, click **Select Roles Available on Self-Subscription and Change Membership**.

A table opens, in which you can indicate whether approval is required when a user wishes to join as a given role, and whether approval is required if the user subsequently wishes to change his or her role.

**Figure 9–3 Controlling Access by Role**

**Self-Subscription / Change Membership**

Subscription  Do Not Allow Self-Subscription and Change Membership  
 Make All Roles Available on Self-Subscription and Change Membership  
 Moderator Approval Required  
 Select Roles Available on Self-Subscription and Change Membership

Role	Self-Subscription		Change Membership	
	Enable	Approval Required	Enable	Approval Required
Viewer	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Participant	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Moderator	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Unsubscription  Require Moderator Approval to Unsubscribe

Take a moment to study this table. By default, users can subscribe to this group space under any of the three roles: **Viewer**, **Participant**, and **Moderator**. You can tell this because the **Enable** box is checked on all three rows. What's different among the three roles is whether **Moderator** approval is required: it isn't for **Viewers** or **Participants**, but it is for **Moderators**.

3. You don't want anyone to join this group space as a **Moderator**, so click the **Enable** check box on the **Moderator** row to de-select it:

**Figure 9–4 Disallowing the Moderator Role**

**Self-Subscription / Change Membership**

Subscription  Do Not Allow Self-Subscription and Change Membership  
 Make All Roles Available on Self-Subscription and Change Membership  
 Moderator Approval Required  
 Select Roles Available on Self-Subscription and Change Membership

Role	Self-Subscription		Change Membership	
	Enable	Approval Required	Enable	Approval Required
Viewer	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Participant	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Moderator	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Unsubscription  Require Moderator Approval to Unsubscribe

We'll take a look at how this will be represented to users attempting to subscribe to the group space in a moment.

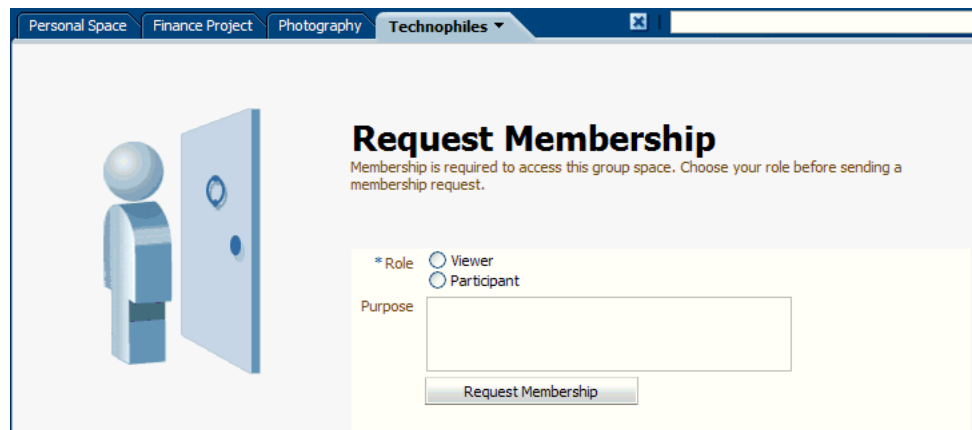
4. You don't necessarily need to know about it when someone wants to unsubscribe from this group space, so click **Require Moderator Approval to Unsubscribe** to take yourself out of the loop.
5. Click **Apply** to commit your changes.

Now people can join the group space as *Viewers* or *Participants*, change their role from one to another, and unsubscribe to the group space, all without your involvement.

Let's quickly take a look at the page users will see when they request membership to this group space.

6. Under **Group Space Pages**, click **View** beside **Self-Subscription Page**:

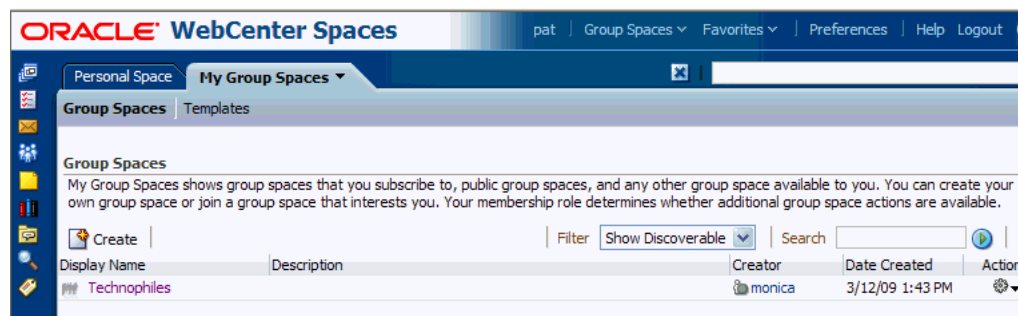
**Figure 9-5 Editing the Self-Subscription Page**



As you can see, the option of becoming a *Moderator* is not even presented to prospective members.

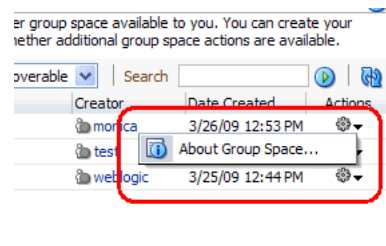
When a WebCenter Spaces user (let's say, Pat) goes to My Group Spaces and changes the filter to **Show Discoverable**, Pat will see the Technophiles group space, as shown in this example:

**Figure 9-6 Pat's My Group Spaces**

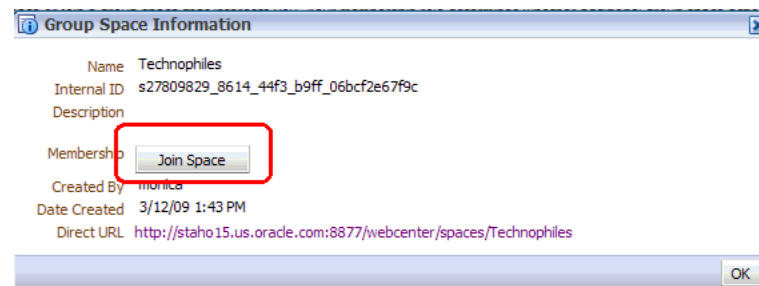


To join Technophiles, Pat clicks **Actions** to display the following menu:



**Figure 9-7 Group Space Actions Menu**

When Pat clicks **About Group Space**, the pop-up shown in [Figure 9-8](#) displays:

**Figure 9-8 Joining Technophiles**

Upon clicking Join Space, Pat sees the page shown in [Figure 9-5](#) and can select the role under which to request membership.

### 9.3 Step 3: Think About Content

Let's take another look at the structure of Technophiles. The Community of Interest template contains three pages that are exposed by default, Home, Events, and Lists, as well as Settings, which you need to manage things like membership, available services, and so forth. (Recall that you can also click **Page Actions->Manage Pages** at the far right to find out if there are any other pages that are currently hidden.)

Looking at the content of the Home page (you may want to click that page now), you realize you already know how to use the Announcements and RSS components because you used them earlier in this tutorial. You also know how to use the group calendar that appears on the Events page, since you used it to schedule the Tony Notebook Sales kickoff meeting (when you were working as Monica). What other kinds of content might be useful for this type of Group Space? Consider this list:

- Links to important documents in the body of the home page.
- Links to important pages within the group space, once it becomes better populated.
- The Discussions page. A group space of this nature, where people are likely to want to trade information on industry rumors, could definitely benefit from exposing the Discussions page, which you can do through the Page Manager. In fact, you might want to set up forums within the Discussions page for discrete product areas like MP3 players, laptops, and other products you think people will want to talk about.
- An RSS feed to CNET's Must Have Gadgets, or another feed of interest.

- A Web Clipping, which you can use to literally copy a live area of a hot Web site to a page within your group space.

Although we're not going to do any of these things in the context of this tutorial, this list of possible content should help give you an idea of how you might use the Community of Interest template to engage your membership base in meaningful interactions and deepen everyone's understanding of the primary topic.

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## Conclusion

Working together, Monica and her team uncovered the source of the dip in Tony Notebook sales. By assuming the identities of these typical business users, you were able to get a first-hand view of how WebCenter Spaces combines commonly used tools and applications into a single, elegant interface. What's more, you had an opportunity to experiment with project group spaces, which provide all the necessary services to facilitate collaboration and communication of all types, and you had a brief look at how communities of interest allow you to organize people around a common interest or theme. Specifically, you learned how to:

- Work within your personal space. Through this tutorial, you touched upon many services that you will no doubt use on a daily basis when WebCenter Spaces is introduced to your enterprise. Things like email, online chats, and scheduling meetings are indispensable to any work environment, of course, but WebCenter Spaces provides much more: the ability to create personal notes for yourself, make your pages available to others in their personal spaces, keep tabs on activity outside your personal space, create quick links (favorites), add RSS feeds to outside services, and many other services that weren't explored in this tutorial.
- Create a project group space. As Monica, you saw how easy it is to create a project group space to help concentrate the efforts of a team on solving a concrete problem, as well as how to control membership for the group. Zeba created a customized list as a means of reporting her findings on the most frequently asked customer questions.
- Create a page. Not only did you learn how to create pages within your own personal space, but you learned how business role pages are an easy way to push content to people who have been assigned to a specific role. You also experimented with populating your page with content, in this case through a spreadsheet presented an OmniPortlet, and by creating your own customized text. And when you tagged the Data page, you made it easy for others to locate that page even if they didn't know it was relevant to what they were looking for.
- Work with documents. The Documents service provides a powerful interface that brings even far-flung content right to your fingertips. You saw how each group space has its own folder in the Document service tree structure, as well as how your personal documents are available on the Documents page in your personal space. You also quickly uploaded a document from your file system to your Public folder, thus making it eligible to share with your fellow group space members
- Create a community of interest. Although we didn't delve too deeply into the power afforded by community of interest group spaces, you nevertheless were provided insight into their potential for bringing together people united by a common interest. You set up membership to control exactly how interested people

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should join this type of group space, and considered the different types of content you might provide to maximize its full potential.

You should now have a basic working knowledge of the advantages provided by WebCenter Spaces. If you want to learn more, *Oracle Fusion Middleware User's Guide for Oracle WebCenter* contains comprehensive instructions for both using and administering WebCenter Spaces. In addition, *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter* tells you how to build custom applications like WebCenter Spaces using Oracle WebCenter Framework, which provides you with a set of features that simplify the process of building a WebCenter application with Oracle ADF and deploying it.

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