

Compoze Portlets

for BEA WebLogic Portal
version 2.0



User's Guide

cp20ug/0002

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Introduction to Compoze Portlets

The Compoze Portlets is a collection of portlets that provide collaborative functionality to BEA WebLogic Platform 8.1. Compoze Portlets enable users access to personal calendars, address books, task lists and mail all within an Enterprise Portal. Adding this functionality brings personal information to the user, where and when they require.

Compoze Portlets include portlets for native calendar, tasks, address book, discussion forums and Internet Mail (SMTP/IMAP/POP). The following table outlines which portlets are delivered for each application:

Portlets	Description
Calendar and Tasks	Includes portlets for calendar and task list.
Discussion Forums	Includes portlets for discussion forums.
Internet Mail	Include portlets for Internet Mail (SMTP/IMAP/POP) and a personal address book.

This guide shows you how to use the Compoze Portlets from the “Avitek” Sample Portal delivered with the BEA WebLogic Portal.



Working with Compoze Portlets

Once you started your Sample portal (available with the BEA WebLogic 8.1 Platform), you can view and use them from within the “Avitek” Sample Portal. This chapter shows you how to get the “Avitek” Sample Portal started, and how to use each of the Compoze Portlets.

To view the portlets inside the sample portal:

1. If it is not already running, start the BEA WebLogic Portal.
2. To access the Sample Portal, from the Start menu, choose Programs > BEA WebLogic Platform 8.1 > Examples > WebLogic Portal > Launch Examples Portal

or

Open a Web browser and point to:

http://%BEA_SERVER_HOST%:7001/sampleportal/sample.portal

The “Avitek” Sample Portal home page opens. Log in to the portal.

3. Click the My Page tab.

The Compoze Portlets are displayed through this tab.

When you first the Compoze Portlets through your portal, they appear in their normal state. A portlet can be maximized so that you are only looking and working in that portlet, or it can be minimized to make room for other portlets on the screen.

This chapter documents:

- “Using the Calendar Portlet” on page 2-2
- “Using the Address Book Portlet” on page 2-14
- “Using the Mail Portlet” on page 2-21
- “Using the Task Portlet” on page 2-27
- “Using the Discussion Portlets” on page 2-32

Using the Calendar Portlet

The calendar portlet displays information about your personal calendar. The following section describes the different views of the portlet and how to add, edit or delete appointments.

- “Mini-View” on page 2-2
- “Maximized View” on page 2-5
- “Configuring the Calendar Portlet” on page 2-13

Mini-View

The mini-view can display appointments in a day, week or month view. The first time you use the portlet, the mini-view defaults to the day view. You can navigate to the day, week or month mini-view by using the icons in the lower left of the portlet.



You can set which view is displayed each time you open the calendar. Just select day, week or month under "Default Mini-View" in the General Preferences section. For more information, see “Configuring the Calendar Portlet” on page 2-13.

Day View

The day view displays appointments for a specific date (displayed at the top of the day view). You can navigate to the previous or next day by using the arrows on the left and right of the date, or by using the previous/next day links at the bottom of the day view.



The default time range to display on a date is from 8:00am to 5:00pm ("Working Hours"). If your appointment is outside the hours displayed in the day view, a new line will be added to your day view for that time. There is no need to shift the start or end times.

Also, the time interval between each hour is 30 minutes by default. This can be set to 15 minutes, 30 minutes or 1 hour. For more information, see "Configuring the Calendar Portlet" on page 2-13.

Week View

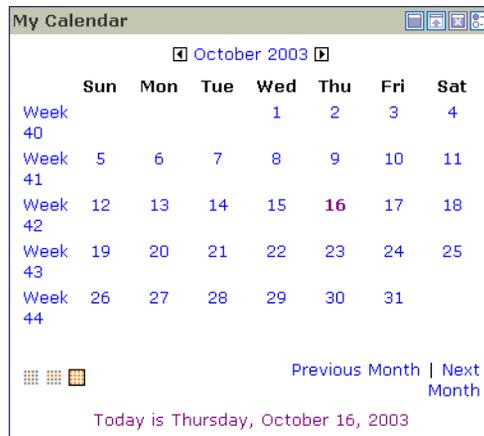
The week view displays appointments for a given week, starting from a specified date. You can navigate to the previous or next week by using the arrows on the left and right of the date, or by using the previous/next week links at the bottom of the week view.



The default starting day for the week is the current day. Seven days (a complete week) are displayed from that date. The default starting-day can be configured to support either the current day or a specific weekday (i.e. Monday, Tuesday, etc.). For more information, see “Configuring the Calendar Portlet” on page 2-13.

Month View

The month view displays appointments for a complete month. Days of the month that have appointments are shown in bold. You can navigate to the previous or next month by using the arrows on the left and right of the date, or by using the previous/next month links at the bottom of the month view.



Maximized View

You can view your calendar by day, week, month, or year within the Maximized view. Use the navigation links in the upper right of your calendar to change views. Additionally, there are appointment listing and search views which allow you to navigate directly to a specific appointment or set of appointments.

You can set which view is displayed each time you open the calendar. Just select day, week, month, or year under "Default View" in the General Preferences section. For more information, see "Configuring the Calendar Portlet" on page 2-13.

Day View

The day view displays appointments for a specific date (displayed at the top of the day view). You can navigate to the previous or next day by using the arrows on the left and right of the date, or by using the previous/next day links at the bottom of the day view.

The day view also presents a mini-month view in the left column to quickly jump to a specific date.

The screenshot shows the 'My Calendar' portlet interface. At the top, there are navigation options: 'Day | Week | Month | Year | Appointment List'. The current view is 'Day', showing 'Thursday, October 16, 2003'. On the left, a mini-month view for October 2003 is displayed, with the 16th highlighted. Below the mini-month is a search bar with a 'Go' button and a 'Search Appointments' link. The main calendar grid shows time slots from 8:00 AM to 5:00 PM. Appointments are listed as follows:

Date	My Calendar
8:00 AM	Customer Conference (Busy) [Delete]
9:00 AM	9:00 AM - 10:00 AM ! (Busy) Conf call with XYZ [Delete]
10:00 AM	
11:00 AM	
12:00 PM	12:00 PM - 12:30 PM (Busy) Lunch [Delete]
1:00 PM	
2:00 PM	
3:00 PM	
4:00 PM	
5:00 PM	

At the bottom right of the calendar grid, there are links for 'Previous Day' and 'Next Day'. At the bottom left, there is a link 'Back to Mini-Day View'.

The Time Interval between each hour is 30 minutes by default. This can be set to 15 minutes, 30 minutes or 1 hour. For more information, see “Configuring the Calendar Portlet” on page 2-13.

Week View

The week view displays appointments for a given week, starting from a specified date. You can navigate to the previous or next week by using the arrows on the left and right of the date, or by using the previous/next week links at the bottom of the week view.

The week view also presents a mini-month view in the left column to quickly jump to a specific date. These links will bring you back to the day view.

My Calendar

[Add Appointment](#) [Day](#) | [Week](#) | [Month](#) | [Year](#) | [Appointment List](#)

October 13 - October 19

Date	My Calendar
Mon 10/13 [Add]	
Tue 10/14 [Add]	
Wed 10/15 [Add]	
Thu 10/16 [Add]	<ul style="list-style-type: none">All Day (Busy)Customer Conferen... [Delete]9:00 AM - 10:00 AM ! (Busy)Conf call with XY... [Delete]12:00 PM - 12:30 PM (Busy)Lunch [Delete]
Fri 10/17 [Add]	
Sat 10/18 [Add]	
Sun 10/19 [Add]	

Today is Thursday, October 16, 2003

Search Appointments:

[Search Appointments](#)

[Previous Week](#) | [Next Week](#)

[Back to Mini-Week View](#)

The default starting day for the week is the current day. Seven days (a complete week) are displayed from that date. The default starting-day can be configured to support either the Current Day or a specific weekday (i.e. Monday, Tuesday, etc.). For more information, see “Configuring the Calendar Portlet” on page 2-13.

Month View

The month view displays appointments for a complete month. You can navigate to the previous or next month by using the arrows on the left and right of the date, or by using the previous/next month links at the bottom of the month view. Days of the month that have appointments show a small section of the appointment subject and the starting time (or 'All Day' if an all day appointment).

The month view displays a list of the months of the year to quickly jump to a specific month.

My Calendar

Add Appointment

Day | Week | **Month** | Year | Appointment List

October 2003

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
Week 40				1 [Add]	2 [Add]	3 [Add]	4 [Add]
Week 41	5 [Add]	6 [Add]	7 [Add]	8 [Add]	9 [Add]	10 [Add]	11 [Add]
Week 42	12 [Add]	13 [Add]	14 [Add]	15 [Add]	16 [Add] All day 9:00 AM 12:00 PM Conf ca... Lunch	17 [Add]	18 [Add]
Week 43	19 [Add]	20 [Add]	21 [Add]	22 [Add]	23 [Add]	24 [Add]	25 [Add]
Week 44	26 [Add]	27 [Add] 2:00 AM TestApp...	28 [Add]	29 [Add]	30 [Add]	31 [Add]	

Today is Thursday, October 16, 2003

Search Appointments:

Go

Search Appointments

Back to Mini-Month View

Previous Month | Next Month

Year View

The year view displays all 12 months in a specified year. Days of the month that have appointments are shown in bold. You can jump to the month view of a specific month by

clicking the month name. You can also jump to a specific day by clicking the day. The year view displays the next 2 years to quickly jump to a specific year.

My Calendar ☰ ☱ ☲ ☳ ☴ ☵ ☶ ☷

[Day](#) | [Week](#) | [Month](#) | [Year](#) | [Appointment List](#)

☒ 2003 ☒

January							February							March						
Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat
			1	2	3	4	2	3	4	5	6	7	8	2	3	4	5	6	7	8
5	6	7	8	9	10	11	9	10	11	12	13	14	15	9	10	11	12	13	14	15
12	13	14	15	16	17	18	16	17	18	19	20	21	22	16	17	18	19	20	21	22
19	20	21	22	23	24	25	23	24	25	26	27	28	23	24	25	26	27	28	29	
26	27	28	29	30	31								30	31						

☒ 2003 ☒

April							May							June						
Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat
		1	2	3	4	5				1	2	3	1	2	3	4	5	6	7	
6	7	8	9	10	11	12	4	5	6	7	8	9	10	8	9	10	11	12	13	14
13	14	15	16	17	18	19	11	12	13	14	15	16	17	15	16	17	18	19	20	21
20	21	22	23	24	25	26	18	19	20	21	22	23	24	22	23	24	25	26	27	28
27	28	29	30	25	26	27	28	29	30	31	29	30								

☒ 2003 ☒

July							August							September						
Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat
		1	2	3	4	5					1	2	1	2	3	4	5	6		
6	7	8	9	10	11	12	3	4	5	6	7	8	9	7	8	9	10	11	12	13
13	14	15	16	17	18	19	10	11	12	13	14	15	16	14	15	16	17	18	19	20
20	21	22	23	24	25	26	17	18	19	20	21	22	23	21	22	23	24	25	26	27
27	28	29	30	31	24	25	26	27	28	29	30	28	29	30						

☒ 2003 ☒

October							November							December						
Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat
			1	2	3	4						1	1	2	3	4	5	6		
5	6	7	8	9	10	11	2	3	4	5	6	7	8	7	8	9	10	11	12	13
12	13	14	15	16	17	18	9	10	11	12	13	14	15	14	15	16	17	18	19	20
19	20	21	22	23	24	25	16	17	18	19	20	21	22	21	22	23	24	25	26	27
26	27	28	29	30	31	23	24	25	26	27	28	29	28	29	30	31				

Previous Year | Next Year

Search Appointments:

[Search Appointments](#)

Search Appointments

Included with all views is a place to perform a quick search of your appointments. The search will check all appointment subjects for the search string you enter. The resulting list will present a listing of appointments that is sortable and viewable by page.

My Calendar

Search Results [Day](#) | [Week](#) | [Month](#) | [Year](#) | [Appointment List](#)

Search Words:

showing 1 - 6 of 6 | [First](#) | [Previous](#) | [Next](#) | [Last](#)

<input type="checkbox"/>	Date ^	Time	Subject	
<input type="checkbox"/>	10/16/2003	11:00 AM	TestXYZ ↓ (Out of Office)	Delete
<input type="checkbox"/>	10/27/2003	9:00 AM	TestAppoinement (Busy)	Delete
<input type="checkbox"/>	11/26/2003	4:00 PM	TestRecurringApt ↻ (Busy)	Delete
<input type="checkbox"/>	10/22/2005	11:00 AM	NewTestApt 🟡 ! (Out of Office)	Delete
<input type="checkbox"/>	10/22/2005	11:00 AM	TestAbc ! (Out of Office)	Delete
<input type="checkbox"/>	10/22/2005	11:25 AM	Check the System Tester ! (Out of Office)	Delete

Appointment List

There is a subsequent maximized view that allows you to view your appointments by a direct listing. Included with this view are quick filters for viewing all upcoming and recent appointments. This view is also sortable by a variety of fields.

My Calendar

[Day](#) | [Week](#) | [Month](#) | [Year](#) | **Appointment List**

October 2003

Upcoming Appointments

View: [All](#) | [Upcoming](#) | [Past](#) showing 1 - 4 of 4 | [First](#) | [Previous](#) | [Next](#) | [Last](#)

<input type="checkbox"/>	Date ^	Time	Subject	
<input type="checkbox"/>	10/16/2003	11:00 AM	TestXYZ ↓ (Out of Office)	Delete
<input type="checkbox"/>	10/16/2003	5:00 PM	Conf call with XYZ ! (Busy)	Delete
<input type="checkbox"/>	10/16/2003	8:00 PM	Lunch (Busy)	Delete
<input type="checkbox"/>	10/27/2003	9:00 AM	TestAppoinement (Busy)	Delete

Today is Thursday, October 16, 2003

Search Appointments:

[Search Appointments](#)

Add Appointment

Below displays the main fields that can be set upon the addition of an appointment, including the ability to set the appointment as a repeating appointment.

My Calendar ⊞ ⊞ ⊞ ⊞

Add Appointment

Save Save and Add Another Cancel

Primary Information

Subject:

Date:

Time: This is an **all day** event.
 Starts at:
Ends at:

Location:

Description:

Category:

Show time as:

Priority:

Repeating

Do not repeat this event
 Repeat
 Repeat annual (e.g. yearly)
End Date:
 No end date (e.g. always)
 Until

Save Save and Add Another Cancel

Edit Appointment

Below displays the main fields that can be edited upon clicking into the edit view of an appointment. This also includes the ability to edit the repeating attributes of a recurring appointment.

My Calendar

Edit Appointment

Save Cancel

Primary Information

Subject:

Date:

Time: This is an **all day** event.
 Starts at:
Ends at:

Location:

Description:

Category:
Birthday
Graduation
Holiday
Add...

Show time as:

Importance:

Repeating

Do not repeat this event

Repeat

Repeat annual (e.g. yearly)

End Date:

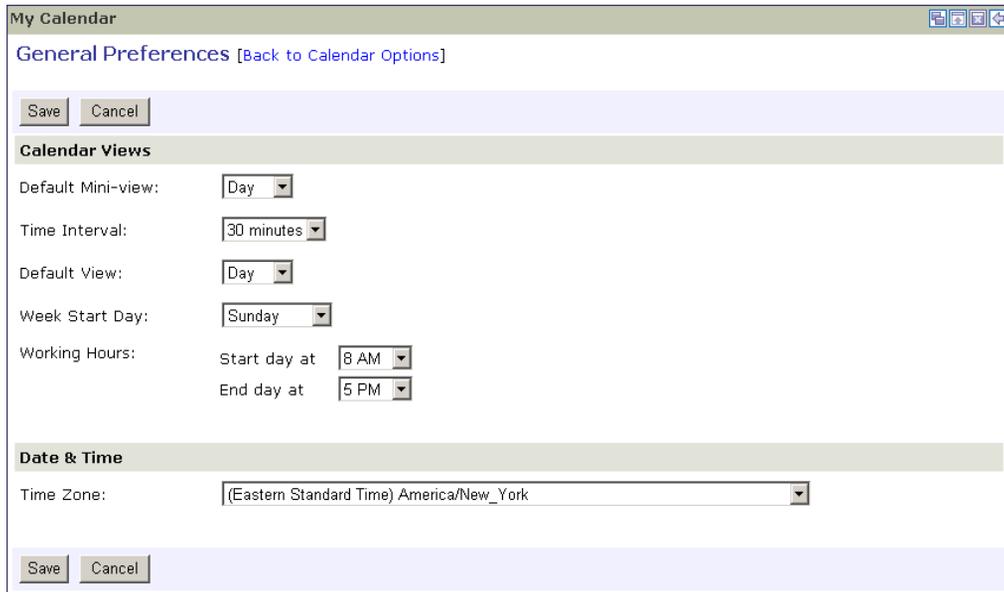
No end date (e.g. always)

Until

Save Cancel

Configuring the Calendar Portlet

By entering the edit mode of the portlet, you can configure the preferences of the calendar portlet.



The screenshot shows the 'My Calendar' portlet configuration interface. At the top, there is a title bar with the text 'My Calendar' and three small icons. Below the title bar, the page is titled 'General Preferences [Back to Calendar Options]'. There are two 'Save' and 'Cancel' buttons at the top and bottom of the form. The form is divided into two main sections: 'Calendar Views' and 'Date & Time'. Under 'Calendar Views', there are five rows of settings: 'Default Mini-view' set to 'Day', 'Time Interval' set to '30 minutes', 'Default View' set to 'Day', 'Week Start Day' set to 'Sunday', and 'Working Hours' with 'Start day at' set to '8 AM' and 'End day at' set to '5 PM'. Under 'Date & Time', there is one row: 'Time Zone' set to '(Eastern Standard Time) America/New_York'.

From General Preferences, you can set the default mini-view (day, week or month), the default view (day, week, month or year), the day Time Interval (15 minutes, 30 minutes or 1 hour), the day view start and end times ("Working Hours"), and the week start day (Current Day, Sunday, Monday, etc.).

From Appointment List Options, you can set the number of appointments to display on a single page in the Appointment List view.

Using the Address Book Portlet

The contact portlet allows you to add, edit, and delete members in your personal address book. The following section describes the different views of the portlet and how to add, edit or delete contacts:

- “Mini-View” on page 2-14
- “Maximized View” on page 2-15
- “Configuring the Address Book Portlet” on page 2-20

Mini-View

The Mini-View provides a way to jump to specific contacts by name or search keyword. To view All contacts in your address book, click the All link. You can search for contacts alphabetically by selecting the link for the first letter of the contact's last name.

To search contacts, enter a phrase or word in the text box and press Go.

A “Quick Add” form can be optionally displayed on the Mini-View. This allows you to enter first and last name, email address, nickname, and primary phone number for a contact without having to switch to the Maximized View.

The screenshot shows a web interface titled "My Contacts". At the top, there is a search bar with the text "Search:" followed by an input field and a "Go" button. Below the search bar is a navigation menu consisting of two rows of blue links: "All | A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T" on the first row, and "U | V | W | X | Y | Z" on the second row. Below the navigation menu is a section titled "Quick Add:" with a light green background. This section contains four input fields: "Name (first, last)" (with a first and last name sub-field), "Email", "Phone" (with a dropdown menu currently set to "work"), and "Nickname". An "Add" button is located to the right of the "Nickname" field.

Maximized View

In the Maximized View, you can navigate through pages of contacts, delete, add new contacts, search, or jump to specific names by first letter of the last name.

My Contacts

Add Contact Search [] Go

All [Printable View](#)

All - A B C D E F G H I J K L M N O P Q R S T U V W X Y Z showing 1 - 5 of 5 | First | Previous | Next | Last

<input type="checkbox"/>	First Last	Company	Email	Phone
<input type="checkbox"/>	Incredulous Bulk ("Bulky") [Edit]		Bulky@xyz.com	
<input type="checkbox"/>	Brooke Melissa [Edit]	VideoCompany	BM@zzz.yyy	
<input type="checkbox"/>	Mr. Jim Smith ("Jimmy") [Edit]	Company Inc.	jim.smith@xyz.abc	111-555-5555
<input type="checkbox"/>	Adam Sphynxman [Edit]		a.s@xyz.abc	
<input type="checkbox"/>	X Y Z ("nickname") [Edit]	Company Name	email	biz number

Delete

[Back to Mini-View](#)

The number of contacts displayed on each page can be set in the General Preferences section of the portlet edit view. For more information, see “Configuring the Address Book Portlet” on page 2-20.

Contact Details

By clicking on a contact name, the contact details are displayed. The details include all contact fields that are currently set, with the associated values.

My Contacts ⌵ ⌵ ⌵

X Y Z ("nickname") [[Back to Contacts](#)]

Nickname: nickname
Email: email
Mailing Address: Business

Phone Numbers

Home: home number
Mobile: mobile number
Pager: pager number
Business Phone: biz number
Business Fax: biz fax
Other 1: other 1
Other 2: other 2

Business Information

Company: Company Name
Title: Job Title
Business Address: Biz Street
Bizcity, bizstate bizzip bizcountry
Website: www.bea.com
Manager: manager
Assistant: assistant
Department: department
Office: office
Profession: profession

Personal Information

Home Address: homestreet
homecity, homestate homezip homecountry
Spouse: spouse
Alt. Email 1: altemail2
Alt. Email 2: altemail3
Birthday: Oct 15, 1935
Anniversary: Oct 6, 1955
Comments: comments

Other Information

Other Address: otherstreet
othercity, otherstate otherzip othercountry

Add Contact

When “add” contact button or link is selected, it will take you to a screen that appears as the following. This displays all of the fields that can be set upon adding a contact.

The screenshot shows the 'Add Contact' form within a 'My Contacts' portlet. The form is organized into several sections, each with a header and a set of input fields:

- Primary Information:** Includes fields for Name (First, Middle, Last), Email, Nickname, and Mailing Address (with a dropdown menu set to 'Business').
- Phone Numbers:** Includes fields for Personal (Home, Pager, Mobile), Business (Phone, Fax), and Misc (Other 1, Other 2).
- Business Information:** Includes fields for Company (Name, Title/position), Business Address (Street, City, State, Zip/Postal, Country), Website (with a note: e.g. http://www.compoze.com), Associates (Manager, Assistant), and Misc (Department, Office, Profession).
- Personal Information:** Includes fields for Home Address (Street, City, State, Zip/Postal, Country), Spouse, alt. Emails, Important Dates (Birthday (mm/dd/yyyy) and Anniversary (mm/dd/yyyy)), and Comments.
- Other Information:** Includes fields for Other Address (Street, City, State, Zip/Postal, Country).

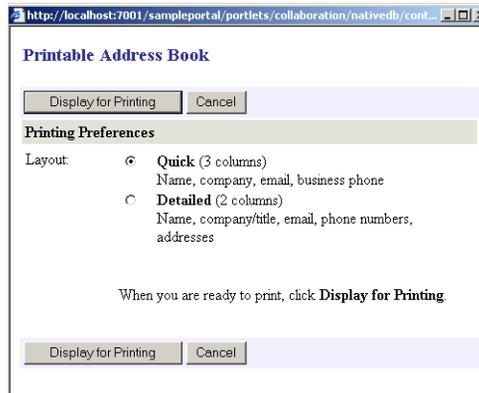
At the top of the form, there are buttons for 'Save', 'Save and Add Another', and 'Cancel'. A similar set of buttons is located at the bottom of the form.

Edit Contact

When a contact is selected for editing, it will take you to a screen that appears as the “Add Contact” view, however, the fields will be pre-populated with the existing values for the particular contact. In this view, all of the fields of the contacts information can be updated.

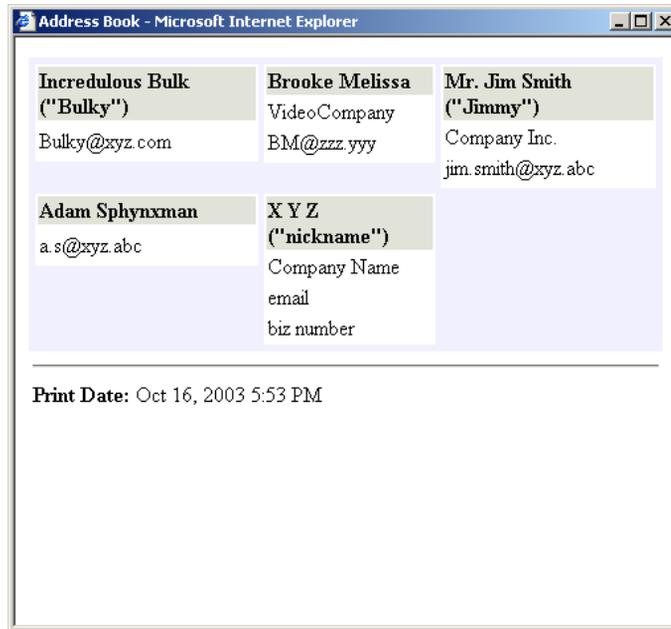
Printable View

This view allows you to generate a view for printing out your address book. By selecting the Printable View link, you are prompted to select a layout mode:

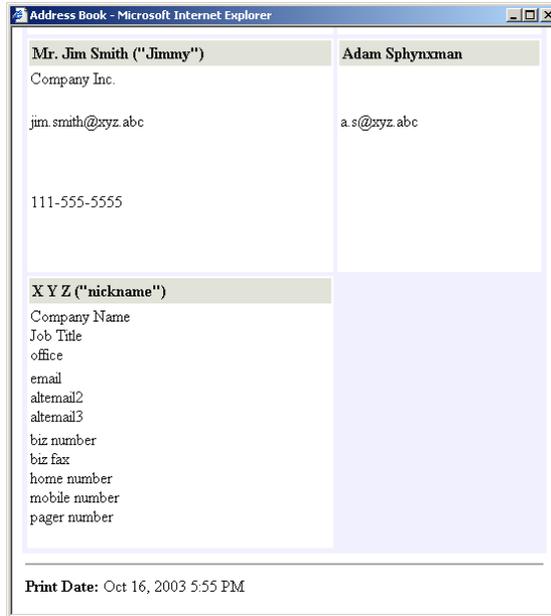


Layout Mode	Description
Quick	Creates a 3-column view of core contact information (name, company, email and phone)
Detailed	Creates a 2-column view of all contact information (name, company information, personal information, email addresses and phone numbers)

Below demonstrates a printable view of contacts with the “Quick” version selected.

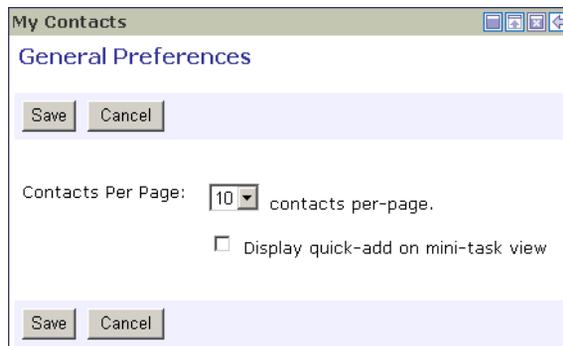


Below demonstrates a printable view of contacts with the “Detailed” version selected.



Configuring the Address Book Portlet

By entering the edit mode of the portlet, you can configure the preferences of the address book portlet.



From General Preferences, you can set the number of contacts to display on a single page in the Maximized view. You can also select whether to display the Quick Add form on the Mini-View.

Using the Mail Portlet

The mail portlet allows you to send, receive and manage your email. The following section describes the different views of the portlet and how to perform the basic functions:

- “Mini-View” on page 2-21
- “Maximized View” on page 2-22
- “Configuring the Mail Portlet” on page 2-27

Mini-View

Upon initially viewing this portlet, configuration to an imap or pop3 account is required. The following screen guides the user to what information they need enter to establish the connection. This information includes, email address, mailbox alias, password, incoming/outgoing servers. Additionally, a user will have to supply information for the names of special reserved mail folders such as “Drafts”, “Sent” and “Deleted”.

My Mail

Please configure your email account settings, contact your system administrator if you need further details.

Save

Internet E-mail Address

Email Address:

For example: someone@compoze.com

E-mail Server Names

My incoming mail server is:

Incoming mail(POP3 or IMAP) server:

An SMTP server is the server that is used for your outgoing e-mail.

Outgoing mail(SMTP) server:

Internet Mail Logon

Type the account name and password your Internet service provider has given you.

Account name:

Password:

Folder Settings

Please select the appropriate main folders for your account.

Deleted Folder:

Drafts Folder:

Sent Folder:

Save

The Mini-View provides an overview of your mail **Inbox**. This view shows a number (by default, 5) of the latest email messages. You can navigate through the messages, check for new mail, and jump to the **Inbox** or any other folder in your mailbox.



The Mini-View can be customized to configure the number of messages to display and specify a filter to only show messages from certain people. For more information, see “Configuring the Mail Portlet” on page 2-27.

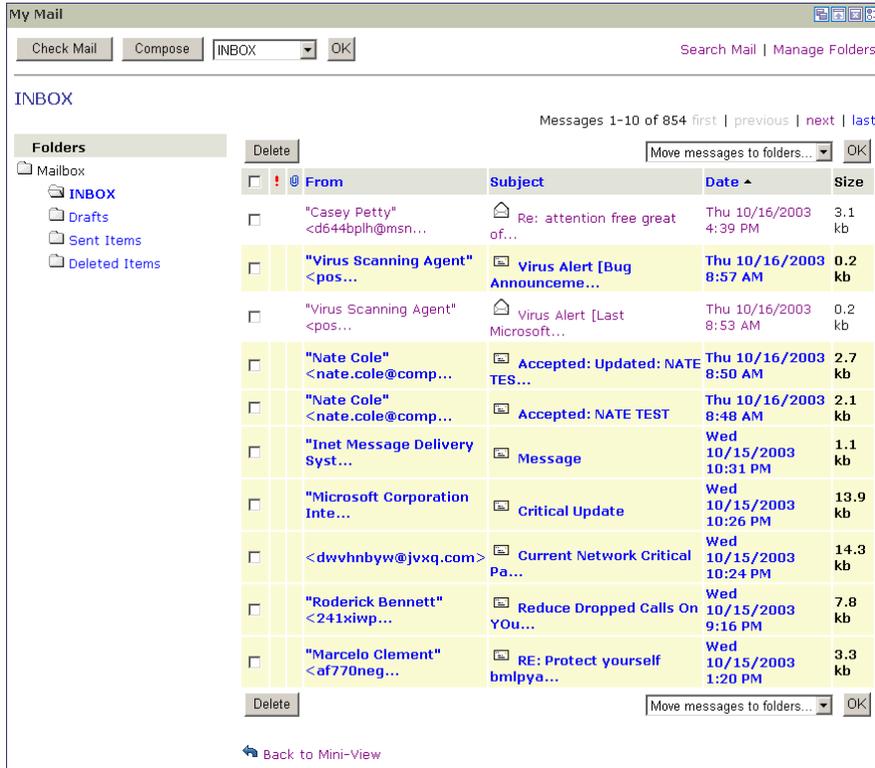
Maximized View

In the Maximized View, you can navigate through messages in your folders. You can move and delete, view the subject, sent date, from, priority and attachment status of messages.

In the default Maximized View, messages can be displayed in two possible ways: Messages and Folders or Messages only. This setting can be configured in the General Preferences section of the portlet edit view. For more information, see “Configuring the Mail Portlet” on page 2-27.

Messages and Folders

This view displays folders on the left to navigate through and message on the right. Additionally, this view is sortable by a variety of fields. The top of this view also gives buttons and links to functions, such as “Compose” a new message, within the mail portlet.



The number of messages displayed on each page can be set in the General Preferences section of the portlet edit view. For more information, see “Configuring the Mail Portlet” on page 2-27.

Messages only

This view displays only messages. You can use the “Go to folder...” drop-down to navigate to a specific folder.

The screenshot shows the 'My Mail' portlet interface. At the top, there are buttons for 'Check Mail', 'Compose', and a dropdown menu set to 'INBOX' with an 'OK' button. To the right, there are links for 'Search Mail' and 'Manage Folders'. Below this is the 'INBOX' header, followed by a status bar indicating 'Messages 1-10 of 859' and navigation links for 'first', 'previous', 'next', and 'last'. There are two 'Delete' buttons and a 'Move messages to folders...' dropdown with an 'OK' button. The main area contains a table of messages with columns for 'From', 'Subject', 'Date', and 'Size'. The messages are listed as follows:

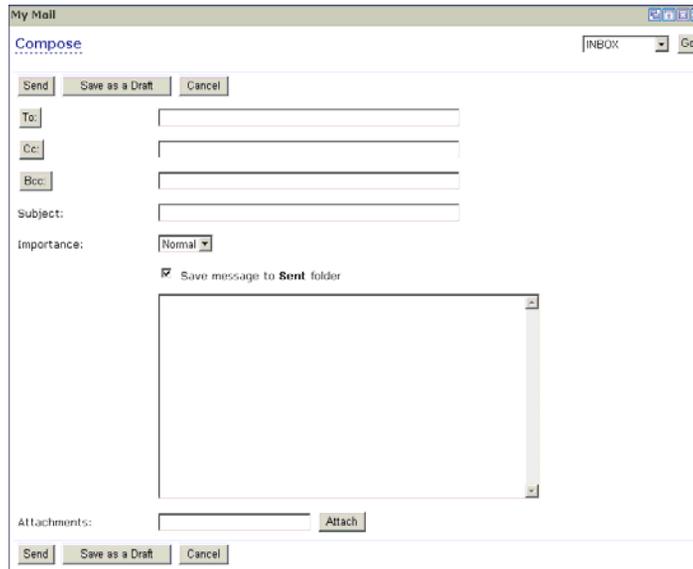
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	From	Subject	Date	Size
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	"Casey Petty" <d644bplh@msn...>	Re: attention free great of...	Thu 10/16/2003 4:39 PM	3.1 kb
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	"Virus Scanning Agent" <pos...>	Virus Alert [Bug Announceme...	Thu 10/16/2003 8:57 AM	0.2 kb
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	"Virus Scanning Agent" <pos...>	Virus Alert [Last Microsoft...	Thu 10/16/2003 8:53 AM	0.2 kb
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	"Nate Cole" <nate.cole@comp...>	Accepted: Updated: NATE TES...	Thu 10/16/2003 8:50 AM	2.7 kb
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	"Nate Cole" <nate.cole@comp...>	Accepted: NATE TEST	Thu 10/16/2003 8:48 AM	2.1 kb
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	"Warren Reid" <axfsq51@yaho...>	Get NATE TEST	Thu 10/16/2003 8:38 AM	1.4 kb
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	"Emma Carr" <nijznjp3@yahoo...>	fwd: save gass yv qri	Thu 10/16/2003 2:52 AM	0.7 kb
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	"Ina Hastings" <wt4msj@pron...>	Alliances, Need your medica...	Thu 10/16/2003 1:23 AM	7.4 kb
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	"Microsoft Corporation Cust...	{Virus?} Last Critical Pack	Wed 10/15/2003 11:50 PM	15.1 kb
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	"Microsoft Internet Mail De...	Bug Message	Wed 10/15/2003 11:32 PM	1.7 kb

At the bottom left, there is a 'Back to Mini-View' link. At the bottom right, there is another 'Delete' button and a 'Move messages to folders...' dropdown with an 'OK' button.

The number of messages displayed on each page can be set in the General Preferences section of the portlet edit view. For more information, see “Configuring the Mail Portlet” on page 2-27.

Compose Message

You can create a new message by setting the to, cc, bcc, subject and message body. The message can be sent or saved as a draft. You can identify recipients by using the address book by clicking on the “To”, “Cc”, or “Bcc” buttons.



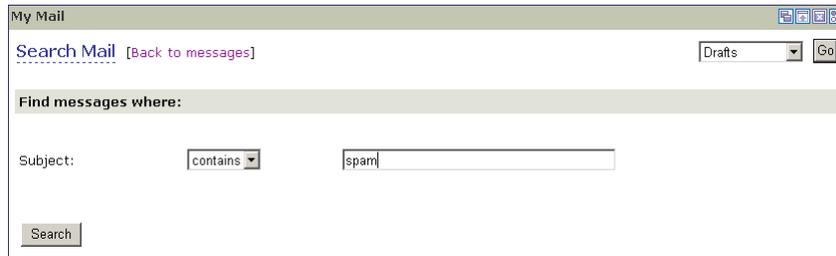
Manage Folders

The “Folders” view of the mail portlet allows you to manage the mail folders within an account by creating, deleting, moving, copying and renaming the folders.

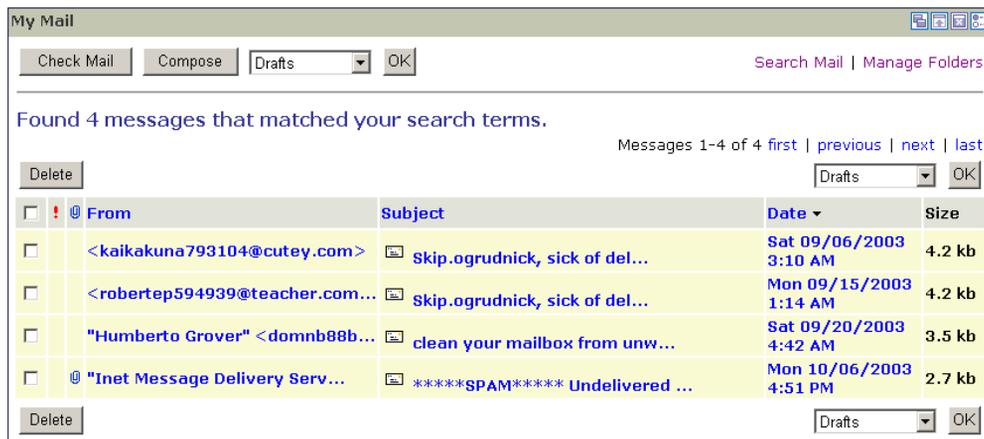


Search Mail

The interface for searching mail, simply gives you an area to search on the subject of a mail message within the current active mail account and allows to test if it is exactly matching or simply contained within the subject field of an email message.



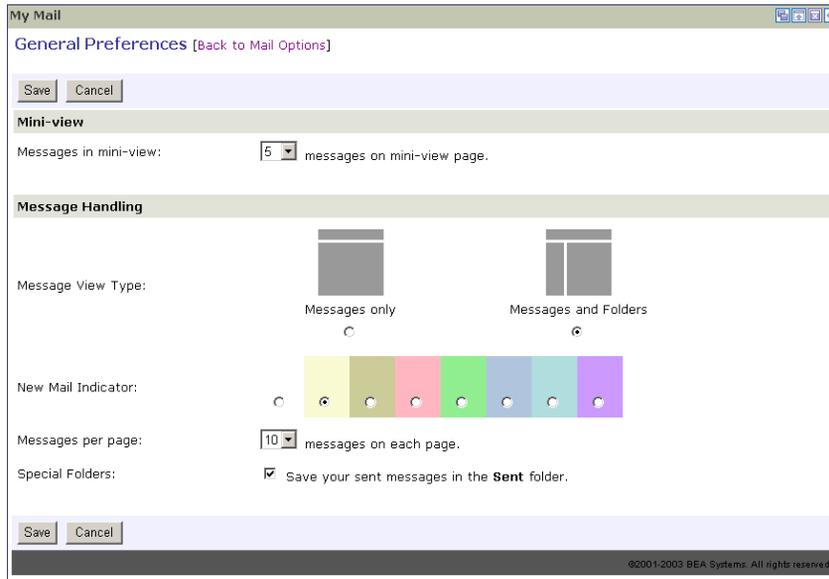
The results of the email search on subject are displayed in a fashion below, similar to that of the maximized view with messages only.



| <input type="checkbox"/> |
|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| <input type="checkbox"/> |

Configuring the Mail Portlet

By entering the edit mode of the portlet, you can configure its preferences.



From General Preferences, you can set two areas of information. First, you can configure the Mini-View. You can select how many messages to display (5, 10, 15).

For the Messages views, you can configure the new mail indicator highlight color (Not available with Lotus Domino Mail Portlet), whether to display Messages Only or Messages and Folders in the Maximized View, the number of messages to display on a single page, and whether to save new messages to the **Sent** folder, by default.

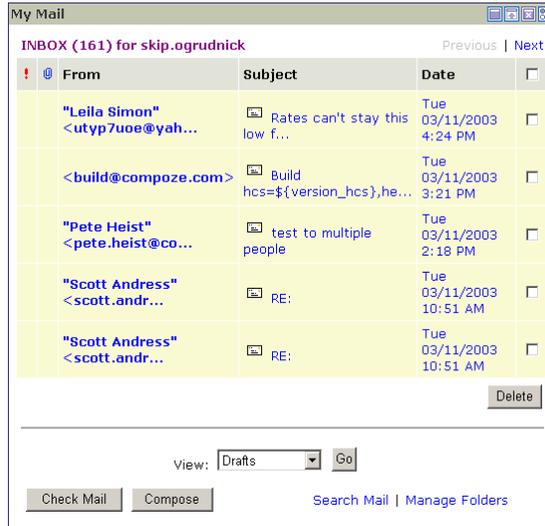
Using the Task Portlet

The task portlet allows you to add, edit, and delete personal tasks. The following section describes the different views of the portlet and how to add, edit or delete tasks:

- “Mini-View” on page 2-28
- “Maximized View” on page 2-28
- “Configuring the Task Portlet” on page 2-31

Mini-View

The Mini-View provides an overview of your current tasks.



By default, the Mini-View displays five tasks. The number of tasks and specific task status can be set in the General Preferences section of the portlet edit view. For more information, see “Configuring the Task Portlet” on page 2-31.

Maximized View

In the Maximized View, you can navigate through pages of tasks, edit, delete, add new tasks, search, or quick filter by complete/not complete status.



The number of tasks displayed on each page can be set in the General Preferences section of the portlet edit view. For more information, see “Configuring the Task Portlet” on page 2-31.

Add Task

When adding a task, all fields can be selected for setting including primary information, such as the start date, end date, subject and status. Additionally, detailed information can be set on this task including, date completed, mileage and billing information.

The screenshot shows a web form titled "My Task List" with a sub-header "Add Task". At the top, there are three buttons: "Save", "Save and Add Another", and "Cancel". The form is organized into two main sections: "Primary Information" and "Details".

Primary Information:

- Subject:** A text input field.
- Due Date:** A radio button for "No due date selected" (selected) and a date picker for "....." (unselected).
- Start Date:** A radio button for "No start date selected" (selected) and a date picker for "....." (unselected).
- Status:** A dropdown menu set to "In-Process".
- Priority:** A dropdown menu set to "Medium".
- % Complete:** A dropdown menu set to "0".
- Description:** A large text area with a vertical scrollbar.

Details:

- Date Completed:** A radio button for "No completed date selected" (selected) and a date picker for "....." (unselected).
- Mileage:** A text input field.
- Billing Information:** A text input field.

At the bottom of the form, there are three buttons: "Save", "Save and Add Another", and "Cancel".

Edit Task

Upon editing a task, all fields that can be set on add of the task, can be modified, as seen below.

My Task List ⌵ ⌵ ⌵ ⌵

Edit Task

Primary Information

Subject:

Due Date: No due date selected

Start Date: No start date selected

Status:

Priority: % Complete:

Description:

Details

Date Completed: No completed date selected

Mileage:

Billing Information:

Task Details

The view below displays a tasks details, once it has been added to the task list.

The screenshot shows a web browser window titled "My Task List". At the top, there is a header bar with a title "Sales call for XYZ" and a link "[Back To Tasks]". To the right of the header is a "Printable View" icon. Below the header is a light blue bar containing three buttons: "Done", "Edit", and "Delete". The main content area displays the following task details:

- Due Date:
- Start Date:
- Status: Cancelled
- Priority: Medium
- % Complete: 0%

Below this is a section titled "Detailed Information" with a light green background. It contains the following details:

- Date Completed:
- Description: This call has gotten pushed to next week.
- Mileage: 150
- Billing Information: 1258.00

At the bottom of the "Detailed Information" section is another light blue bar with three buttons: "Done", "Edit", and "Delete".

Configuring the Task Portlet

By entering the edit mode of the portlet, you can configure the preferences of the task portlet.

The screenshot shows the "My Task List" portlet in its "General Preferences" edit mode. The title bar says "My Task List" and "General Preferences". Below the title bar is a light blue bar with two buttons: "Save" and "Cancel". The main content area contains the following configuration options:

- Mini-View Tasks: A dropdown menu set to "5" tasks per-page.
- Mini-View Show: Two radio buttons, "All Tasks" (unselected) and "Today's Tasks" (selected).
- Tasks Per Page: A dropdown menu set to "10" tasks per-page.

At the bottom of the configuration area is another light blue bar with two buttons: "Save" and "Cancel".

From General Preferences, you can set the number of tasks to display in the mini-view or on a single page in the Maximized view. For the mini-view, you can select whether to only show tasks with from either today or all days.

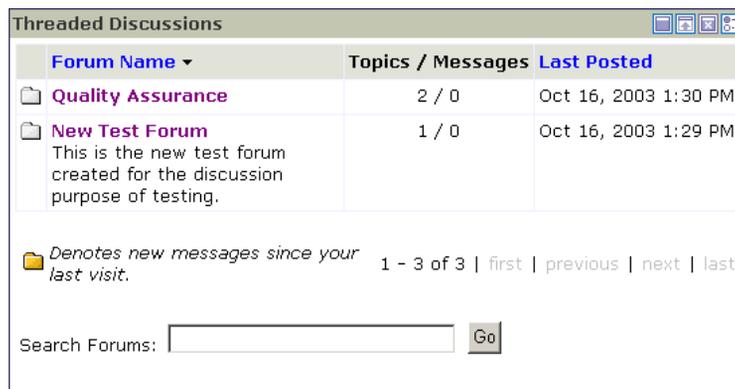
Using the Discussion Portlets

The discussion portlets provide functionality within the portal for threaded discussion forums. There are two portlets that make up discussion, the administrative discussion portlet and the user discussion portlet. The administrative discussion portlet allows an administrator to create, edit and modify permissions on forums and topics within a portal users discussion group. The user discussion portlet, allows a portal user to create and view responses to forum topics and messages in a multi-threaded fashion.

- “Mini-View” on page 2-32
- “Maximized View” on page 2-32
- “Configuring the Discussion Portlet” on page 2-40

Mini-View

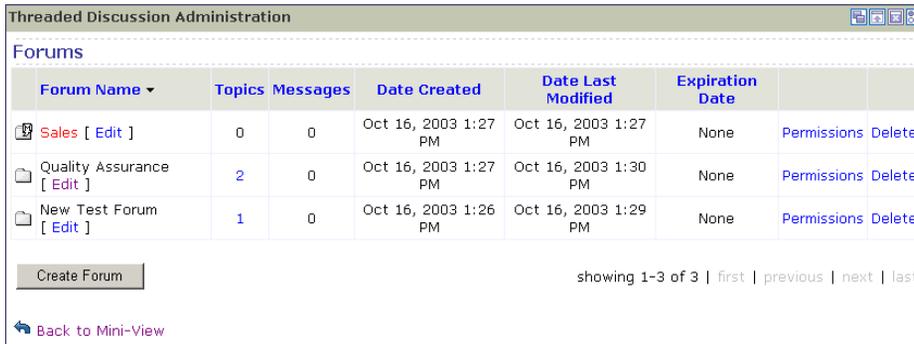
The Mini-View for the administrative portlet basically provides a link to the maximized administrative interface, while the mini view for the user threaded discussion portlet lists the current Forums within the discussion that they may view and post to. The following displays the Mini-View for the user discussion portlet.



Maximized View

The maximized view of the administrative discussion portlet displays a comprehensive listing of the forums, how many topics are within each as well as links to edit the forums, top-

ics and permissions. Additionally, it provides information as to the creation date, last modified date and expiration dates for each forum.

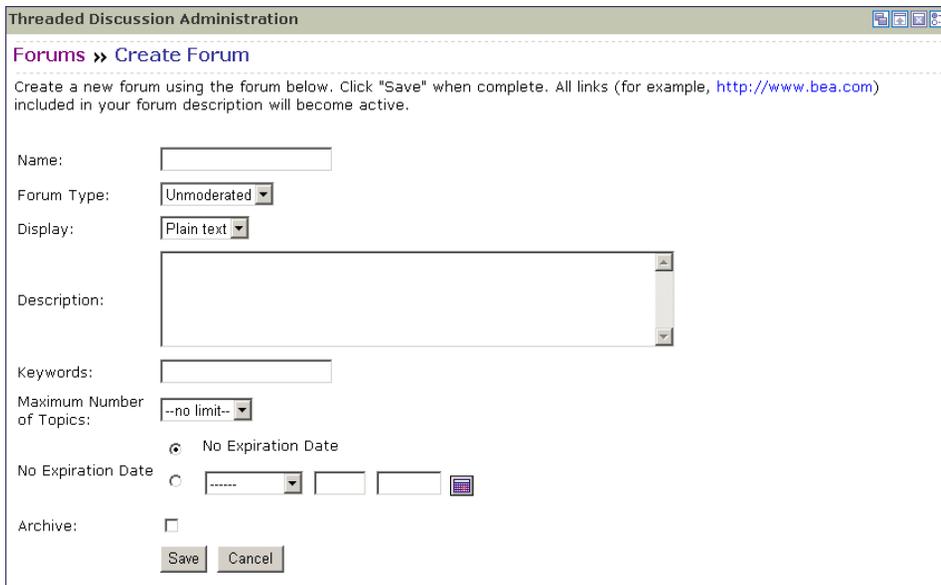


The screenshot shows a web interface titled "Threaded Discussion Administration" with a sub-header "Forums". It contains a table with columns: Forum Name, Topics, Messages, Date Created, Date Last Modified, Expiration Date, and two empty columns. The table lists three forums: "Sales", "Quality Assurance", and "New Test Forum". Each row includes "Permissions" and "Delete" links. Below the table is a "Create Forum" button and pagination information: "showing 1-3 of 3 | first | previous | next | last". A "Back to Mini-View" link is at the bottom left.

Forum Name	Topics	Messages	Date Created	Date Last Modified	Expiration Date		
Sales [Edit]	0	0	Oct 16, 2003 1:27 PM	Oct 16, 2003 1:27 PM	None	Permissions	Delete
Quality Assurance [Edit]	2	0	Oct 16, 2003 1:27 PM	Oct 16, 2003 1:30 PM	None	Permissions	Delete
New Test Forum [Edit]	1	0	Oct 16, 2003 1:26 PM	Oct 16, 2003 1:29 PM	None	Permissions	Delete

Administrative Add Forum

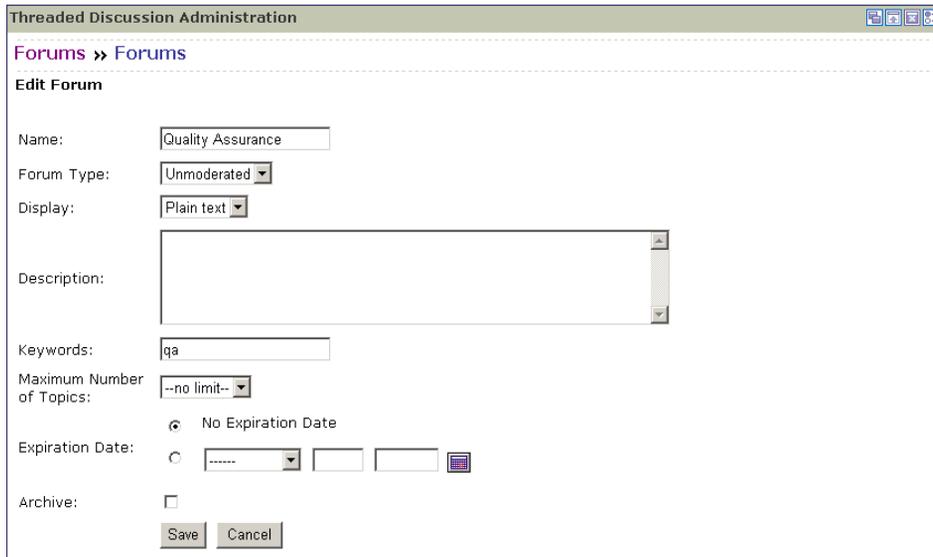
When adding a forum through the administrative interface, the name, forum type (moderated or unmoderated), display, description, keywords (used to help search for the forum), expiration date, and other fields to create a forum for users to interact with can be set.



The screenshot shows the "Create Forum" form in the "Threaded Discussion Administration" interface. The form includes fields for Name, Forum Type (set to "Unmoderated"), Display (set to "Plain text"), Description, Keywords, Maximum Number of Topics (set to "--no limit--"), No Expiration Date (checked), Archive (unchecked), and "Save" and "Cancel" buttons.

Administrative Edit Forum

When editing a forum through the administrative interface all of the fields that may be set upon the add of the forum become selectable for updating.



The screenshot displays the 'Threaded Discussion Administration' window. At the top, it shows 'Forums >> Forums'. Below this is the 'Edit Forum' section. The form includes the following fields and options:

- Name:** A text input field containing 'Quality Assurance'.
- Forum Type:** A dropdown menu set to 'Unmoderated'.
- Display:** A dropdown menu set to 'Plain text'.
- Description:** A large, empty text area.
- Keywords:** A text input field containing 'qa'.
- Maximum Number of Topics:** A dropdown menu set to '--no limit--'.
- Expiration Date:** A radio button labeled 'No Expiration Date' is selected. Below it are two empty date input fields and a calendar icon.
- Archive:** An unchecked checkbox.
- Buttons:** 'Save' and 'Cancel' buttons at the bottom.

Administrative Edit Permissions

Each forum has permissions associated with it so that specific discussion users may be configured to read, edit, delete and other permissions assigned to specific users or groups.

Threaded Discussion Administration 🔍 📄 🗑️

Forums » [Permissions](#)

Topics	Messages	Date Created	Date Last Modified
2	0	Oct 16, 2003 1:27 PM	Oct 16, 2003 1:30 PM

Permission	Principals
READ	<ul style="list-style-type: none"> jrudnick All Discussion Forum Administrators All Discussion Forum Users
DELETE	<ul style="list-style-type: none"> jrudnick All Discussion Forum Administrators
EDIT	<ul style="list-style-type: none"> jrudnick All Discussion Forum Administrators
ADD_TOPIC	<ul style="list-style-type: none"> jrudnick All Discussion Forum Administrators All Discussion Forum Users
MODERATOR	

Modify Permissions

Action	Principal	Permission
<input type="checkbox"/> GRANT <input type="checkbox"/> REVOKE <input type="checkbox"/> DENY	<input checked="" type="radio"/> All Discussion Forum Users <input type="radio"/> All Discussion Forum Administrators <input type="radio"/> User <input style="width: 100px;" type="text"/> <input type="radio"/> Group <input style="width: 100px;" type="text"/>	<input type="checkbox"/> READ <input type="checkbox"/> DELETE <input type="checkbox"/> EDIT <input type="checkbox"/> ADD_TOPIC <input type="checkbox"/> MODERATOR
<input type="button" value="Commit"/>		

[← Back to Forum List](#)

In the above view, the “Modify Permission” section will allow an administrator to assign access rights (GRANT, REVOKE, or DENY) to a specific user or set of users on a specified permission (E.g. Read, Delete, Edit, Add_topic)

Administrative Edit Topic

The administrative interface allows the administrator to edit a topic and all of its fields.

The screenshot shows a web browser window titled "Threaded Discussion Administration". The breadcrumb navigation is "Forums » Quality Assurance » Edit Topic". Below this is a table with columns "Topics", "Messages", "Date Created", and "Date Last Modified". The first row shows "2", "0", "Oct 16, 2003 1:27 PM", and "Oct 16, 2003 1:30 PM".

Below the table is a text area for editing the topic. The instructions state: "Edit an existing topic using the form below. Click 'Save' when complete. All links (for example, <http://www.bea.com>) included in your topic description will become active."

The form fields are:

- Subject:
- Display:
- Message:
- Keywords:
- Expiration Date: No Expiration Date,
- Attachments:

At the bottom are and buttons.

Administrative Edit Message

The administrative interface allows the administrator to edit a message and its fields.

The screenshot shows a web browser window titled "Threaded Discussion Administration". The breadcrumb navigation is "Forums » Quality Assurance » Development QA » Edit Message". Below this is a table with columns "Messages", "Date Created", and "Date Last Modified". The first row shows "1", "Oct 16, 2003 1:27 PM", and "Oct 16, 2003 1:40 PM".

Below the table is a text area for editing the message. The instructions state: "Edit an existing message using the form below. Click 'Save' when complete. All links (for example, <http://www.bea.com>) included in your message description will become active."

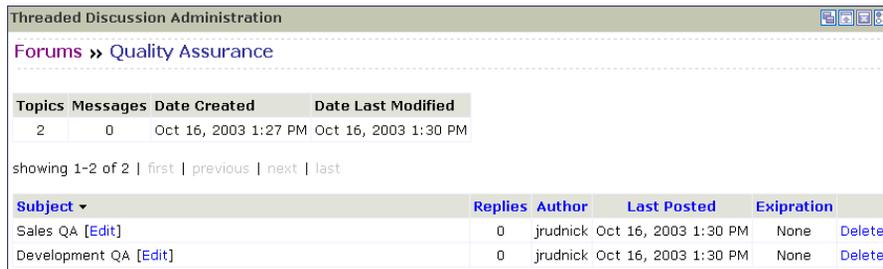
The form fields are:

- Subject:
- Display:
- Message:
- Keywords:
- Attachments:

At the bottom are and buttons.

Administrative Topic Listing

The topic listing allows the administrator to view and navigate the topics within a given forum. The top portion of the display shows the forum details with a topic list below.



The screenshot shows the 'Threaded Discussion Administration' portlet. At the top, it says 'Forums >> Quality Assurance'. Below this is a table with columns: Topics, Messages, Date Created, and Date Last Modified. The table contains one row: 2 Topics, 0 Messages, Oct 16, 2003 1:27 PM Date Created, and Oct 16, 2003 1:30 PM Date Last Modified. Below the table, it says 'showing 1-2 of 2 | first | previous | next | last'. At the bottom, there is another table with columns: Subject, Replies, Author, Last Posted, and Expiration. The table contains two rows: 'Sales QA [Edit]' with 0 replies by jrudnick on Oct 16, 2003 1:30 PM, and 'Development QA [Edit]' with 0 replies by jrudnick on Oct 16, 2003 1:30 PM. Both rows have a 'Delete' link.

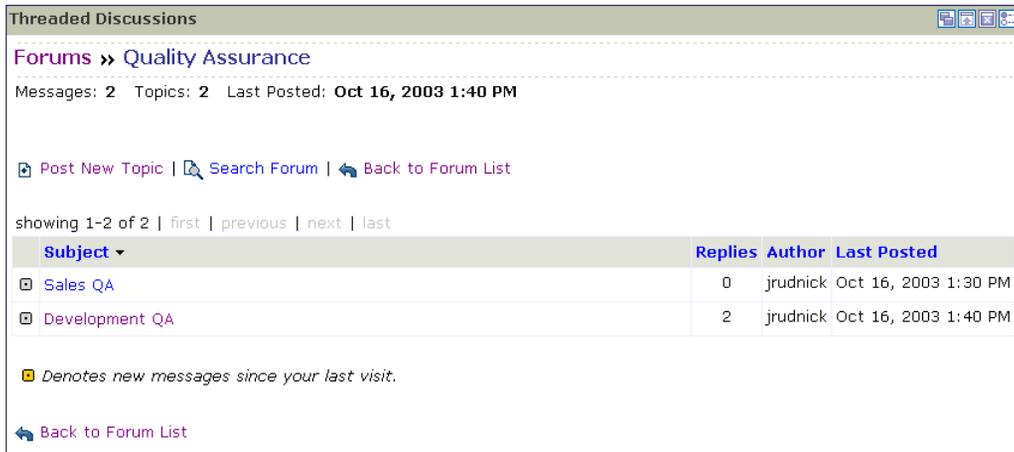
Topics	Messages	Date Created	Date Last Modified
2	0	Oct 16, 2003 1:27 PM	Oct 16, 2003 1:30 PM

showing 1-2 of 2 | first | previous | next | last

Subject	Replies	Author	Last Posted	Expiration
Sales QA [Edit]	0	jrudnick	Oct 16, 2003 1:30 PM	None Delete
Development QA [Edit]	0	jrudnick	Oct 16, 2003 1:30 PM	None Delete

User Forum Details

Within the user discussion portlet, there is the ability to view the forum details, including a listing of the topics within the forum that may be replied to.



The screenshot shows the 'Threaded Discussions' portlet. At the top, it says 'Forums >> Quality Assurance'. Below this, it says 'Messages: 2 Topics: 2 Last Posted: Oct 16, 2003 1:40 PM'. There are links for 'Post New Topic', 'Search Forum', and 'Back to Forum List'. Below this, it says 'showing 1-2 of 2 | first | previous | next | last'. At the bottom, there is a table with columns: Subject, Replies, Author, and Last Posted. The table contains two rows: 'Sales QA' with 0 replies by jrudnick on Oct 16, 2003 1:30 PM, and 'Development QA' with 2 replies by jrudnick on Oct 16, 2003 1:40 PM. Below the table, there is a note: 'Denotes new messages since your last visit.' and a link for 'Back to Forum List'.

Messages: 2 Topics: 2 Last Posted: Oct 16, 2003 1:40 PM

[Post New Topic](#) | [Search Forum](#) | [Back to Forum List](#)

showing 1-2 of 2 | first | previous | next | last

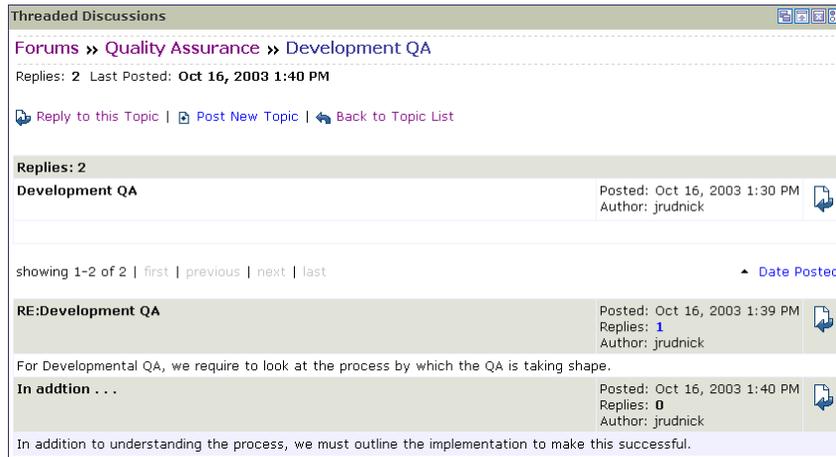
Subject	Replies	Author	Last Posted
<input type="checkbox"/> Sales QA	0	jrudnick	Oct 16, 2003 1:30 PM
<input type="checkbox"/> Development QA	2	jrudnick	Oct 16, 2003 1:40 PM

Denotes new messages since your last visit.

[Back to Forum List](#)

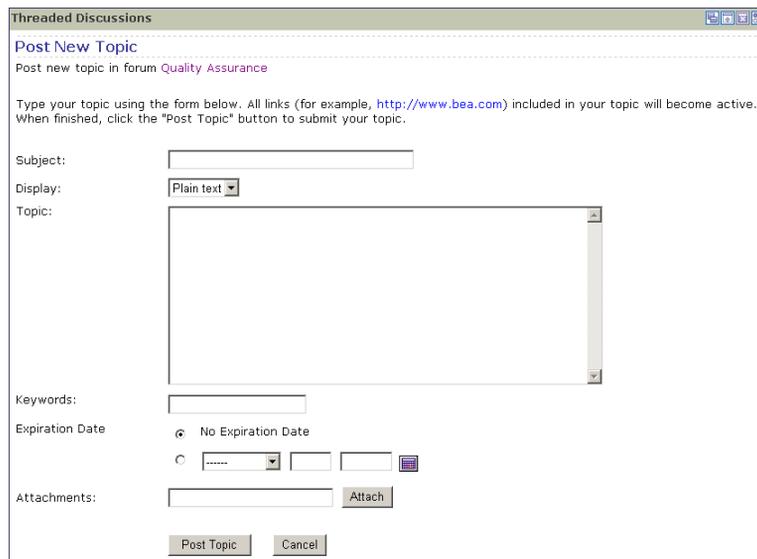
User Topic Details

Within the user discussion portlet, there is the ability to view the topic details, including a multi-threaded view listing the messages within the topic.



User Create Topic

Below demonstrates how one would create a new topic within the user discussion portlet that is attached to a specified forum.



User Create Message

Below demonstrates the form for creation of a new message in response to an existing message or topic within the user discussion portlet.

The screenshot shows a web interface titled "Threaded Discussions" with a sub-header "Post Message". Below the header, there is a message: "Post reply in forum Quality Assurance to message Development QA." and a note: "Type your message using the form below. All links (for example, http://www.bea.com) included in your message will become active. When finished, click the 'Post Message' button to submit your message." The form includes a "Subject:" field with the text "RE Development QA", a "Display:" dropdown menu set to "Plain text", and a large text area for "Your Reply:". Below the text area are "Keywords:" and "Attachments:" fields, each with an "Attach" button. At the bottom of the form are "Post Message" and "Cancel" buttons. Below the form, there is a section for the "Original Message" which shows "Replies: 2", "Development QA", "Posted: Oct 16, 2003 1:30 PM", and "Author: jrudnick".

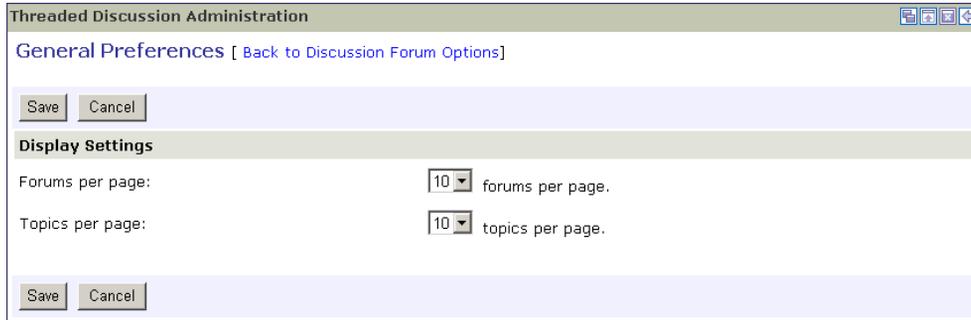
User Discussion Search

For the user portlet, a search is provided so that users may easily find a message that directly relates to what they wish to view.

The screenshot shows a web interface titled "Threaded Discussions" with a sub-header "Search Forums". Below the header, there is a link: "Back to ForumList". The search form includes a "Search Terms:" field with the text "q", a "Forum:" dropdown menu set to "All Forums", and "Date Range:" fields for "Start" and "End" with dropdown menus and input boxes. Below the date range fields is a "Results per Page:" dropdown menu set to "10". At the bottom of the form is a "Search" button. Below the form, there is a section for "Search Results: 1" which shows a link: "RE:Development QA", "Posted on Oct 16, 2003 1:39 PM by jrudnick", and a pagination link: "showing 1-1 of 1 | first | previous | next | last".

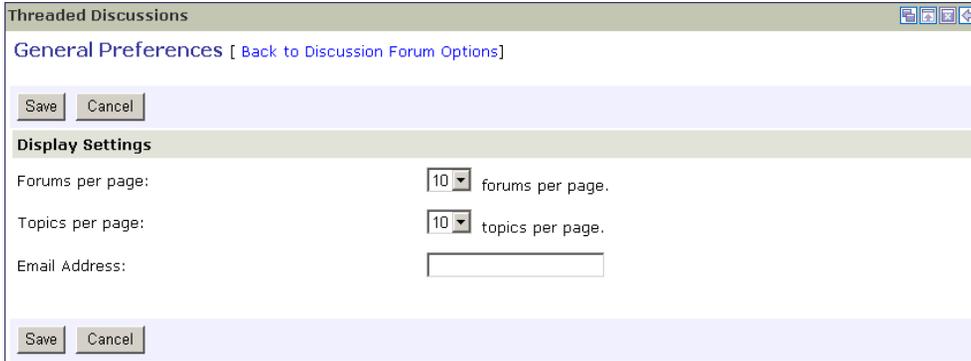
Configuring the Discussion Portlet

By entering the edit mode of the administrative discussion portlet, you can configure the preferences for this administration portlet. Within this area, the number of items per page can be set.



The screenshot shows a web interface titled "Threaded Discussion Administration". At the top, there are navigation icons and a link: "General Preferences [[Back to Discussion Forum Options](#)]". Below this is a "Save" button and a "Cancel" button. A section titled "Display Settings" contains two rows: "Forums per page:" with a dropdown menu set to "10" and the text "forums per page.", and "Topics per page:" with a dropdown menu set to "10" and the text "topics per page.". At the bottom of the section are another "Save" and "Cancel" buttons.

By entering the edit mode of the user discussion portlet, you can configure the preferences for this user portlet. Within this area, the number of items per page can be set, as well as a default email address for use when responding to an discussion forum message...



The screenshot shows a web interface titled "Threaded Discussions". At the top, there are navigation icons and a link: "General Preferences [[Back to Discussion Forum Options](#)]". Below this is a "Save" button and a "Cancel" button. A section titled "Display Settings" contains three rows: "Forums per page:" with a dropdown menu set to "10" and the text "forums per page.", "Topics per page:" with a dropdown menu set to "10" and the text "topics per page.", and "Email Address:" with an empty text input field. At the bottom of the section are another "Save" and "Cancel" buttons.