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CRM System Administrator's Guide

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Describes how to implement the CRM Technology Foundation (JTT) and use its Web-based interface, the System Administrator Console.

Oracle Applications CRM System Administrator's Guide, Release 11i (11.5.9)

Part No. B10354-01

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Preface

Background

In previous releases, this manual was known as *Oracle CRM System Administrator Console Concepts and Procedures* and *Oracle CRM Technology Foundation Concepts and Procedures*. Starting with release 11.5.9, this manual has been retitled *Oracle Applications CRM System Administrator's Guide*. Despite this name change, it still describes how to work successfully with the System Administrator Console, which is the Web-based user interface to the CRM Technology Foundation (JTT).

Furthermore, beginning with release 11.5.9, this manual also describes requirements and setup procedures for the CRM Technology Foundation. Previously, this information formed the *Oracle CRM Technology Foundation Implementation Guide*. That guide is no longer being maintained.

Intended Audience

This guide is intended for consultants, implementation engineers, and system administrators who are setting up the Oracle CRM Technology Foundation and/or using the System Administrator Console .

Documentation Accessibility

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Structure

This guide is organized into the following chapters:

Chapter 1 Implementing the Oracle CRM Technology Foundation

Describes the requirements of the Oracle CRM Technology Foundation and how to implement the Oracle CRM Technology Foundation.

Chapter 2 Understanding the System Administrator Console

This chapter contains descriptions of concepts and terms that are used in the System Administrator Console.

Chapter 3 Using the Security Subtab

This chapter contains instructions on how to perform tasks in the Security subtab of the System Administrator Console, such as creating permissions and assigning them to roles.

Chapter 4 Using the Site Preferences Subtab

This chapter contains instructions on how to perform tasks in the Site Preferences subtab of the System Administrator Console, such as setting up navigation groups.

Chapter 5 Using the System Subtab

This chapter contains instructions on how to perform tasks in the System subtab of the System Administrator Console, such as viewing the debug log or setting up cookies.

Chapter 6 Using the Deployment Tab

This chapter contains instructions on how to perform tasks in the Deployment tab of the System Administrator Console, such as setting up hosts.

Chapter 7 Using the Diagnostics Framework

This chapter contains instructions on how to perform tasks in the Diagnostics Framework, such as running tests.

Chapter 8 Using the Cache Subtab

This chapter contains instructions on how to perform tasks in the Cache subtab of the System Administrator Console, such as managing cache policies.

Chapter 9 Using the Declarative Page Flows Subtab

This chapter contains instructions on how to perform tasks in the Declarative Page Flows subtab of the System Administrator Console, such as creating business flows.

Chapter 10 Using the Declarative Components Subtab

This chapter contains instructions on how to perform tasks in the Declarative Components subtab of the System Administrator Console, such as designing customizable graphs and reports.

Chapter 11 Using the Homepage Subtab

This chapter contains instructions on how to configure default homepages through the Homepage subtab of the System Administrator Console.

Chapter 12 Setting Profile Options

This chapter contains instructions on how to set profile options through the Profile button of the System Administrator Console, such as selecting the display language or turning on the Quick Menu feature.

Related Documents

Where to Find User Management Documentation

Please note that the **Users** tab which appears in the System Administrator Console is not documented in this manual. To learn about user management, please refer to the *Oracle Common Application Components Implementation Guide* and the *Oracle Common Application Components User's Guide*.

Where to Find Web Services Documentation

Please note that the **Integration** tab which appears in the System Administrator Console is not documented in this manual. To learn about application integration and Web Services, please refer to the *Oracle Workflow Web Services Guide*.

Implementing the Oracle CRM Technology Foundation

1.1 Introduction

The Oracle CRM Technology Foundation (JTF) provides Java-based infrastructure software that is used to develop e-business solutions such as Sales, Marketing, Service, e-Commerce, Contracts, and Interaction Center applications. It offers a common platform for developing applications with HTML and Java. It also provides user-friendly screens for centralized setup and administration. This Web-based interface is called the System Administrator Console.

This chapter describes how to successfully implement the Oracle CRM Technology Foundation. The rest of this manual describes how to work successfully with the System Administrator Console.

1.2 Requirements

The Oracle CRM Technology Foundation has the following minimum requirements:

- Apache 1.3.9
- Jserv 1.1
- JSDK 2.0
- OracleJSP 1.1.2
- JDK 1.2.2 or above

1.3 Implementation Summary

The implementation process for the Oracle CRM Technology Foundation includes the following tasks:

- [Running Diagnostics on "HTML Platform" and "CRM Foundation"](#)
- [Changing the System Administrator Password](#)
- [\(Optional\) Configuring System Settings](#)
- [\(Optional\) Configuring Display Preferences](#)
- [\(Optional\) Implementing Custom Style Sheets](#)
- [\(Optional\) Setting Branding Size](#)
- [\(Optional\) Configuring Host Names for the Deployment](#)
- [\(Optional\) Enabling Distributed Caching](#)
- [\(Optional\) Configuring the Cache Statistics Thread Interval](#)

1.4 Running Diagnostics on "HTML Platform" and "CRM Foundation"

Oracle ships important diagnostic tests under the application names "HTML Platform" and "CRM Foundation." Navigate to the Oracle Diagnostics user interface and run all test groups for these two applications. For information on how to run diagnostic tests, see [Chapter 7, "Using Diagnostics."](#)

1.5 Changing the System Administrator Password

Upon shipment, the system administrator identity has "sysadmin" as both its user name and its password. We strongly recommend that you change the password immediately after installation is completed. For information on how to change passwords, please see [Section 12.4, "Changing Your Password."](#)

1.6 Configuring System Settings

For information on how to define system-level properties such as sessions, cookies, and logging, please refer to [Chapter 5, "Using the System Subtab"](#).

1.7 Configuring Display Preferences

For information on how to set up display preferences such as language, currency, and time zone, please see [Section 12.2, "Setting Display Preferences."](#)

1.8 Implementing Custom Style Sheets

This is an optional procedure.

Style Sheet Profile Option

After a user logs in, the style sheet used for the UI is determined by the value of the profile `JTF_PROFILE_DEFAULT_CSS`. This profile can have values at site level, responsibility level or user level. The site level value is set to `jtfucss.css` by default. A system administrator can set values based on site, responsibilities, or users.

Users and Style Sheets

If enabled, users can select a style sheet from the user profile page. Users reach this page by navigating from the **Profile** link to **Display Preferences > Display Style**. The style sheet that a user chooses is saved as a user-level value of the profile `JTF_PROFILE_DEFAULT_CSS`. If a value is set at the user level, that overrides the responsibility or site level value.

To create a list of available style sheets on the user profile page, the system administrator creates a type of **Application Object Library Lookups** named `JTF_STYLE_SHEET_LOOKUP_TYPE` through Oracle JInitiator. The **User Name** of the type can be any name meaningful to the system administrator, but the type must exactly be `JTF_STYLE_SHEET_LOOKUP_TYPE`. The application this type belongs to is usually **CRM Foundation**. This look-up type may have multiple codes.

Each code of this type represents a style sheet. The meaning of the code is displayed in the drop-down list on the user profile page. For example, say a code named `mystyle.css` has the meaning **My Personal Style** as its meaning, and another code named `teamstyle.css` has the meaning **Team Style**. In this case, users will see **My Personal Style** and **Team Style** in the **Display Style** drop-down list. If a certain user selects the style **My Personal Style**, then from that point on the stylesheet `mystyle.css` is used.

Note that setting profile values or lookup data requires you to stop and restart the Java server for changes to take effect. In contrast, making a style sheet choice on the user profile page takes effect immediately.

1.9 Setting Branding Size

Branding refers to the images that appear at the top of Web-based application pages. Branding includes elements such as a corporate logo, an application name, or a product collage image.

There are two size options for branding: medium or regular. Medium branding is more compact in size than regular branding, and the global links in the upper right corner display as text-only hyperlinks rather than round icons.

The system profile **FND: Branding Size** controls branding size. This profile can only be set at site level, and the default value is **Medium**. You can use Oracle JInitiator to change the value. Note that the setting takes effect only after you refresh the profile cache or stop and restart the Java server.

If your installation uses customized style sheets, then you need to create additional style sheets to support the different branding sizes. When naming style sheets, please follow a standard naming convention. For example, if the regular size style sheet is **stylesheet.css**, then create a style sheet named **stylesheet_med.css** to support medium size branding.

Between different style sheets, there can be the following size variations:

- The style **applicationBody** can contain a different size background image.
- Some styles such as **navL0TextDeslct** and **navL0TextSlct** can contain different size fonts.

The default style sheet for medium size branding is **jtfucss_med.css**. If your system uses a customized style sheet and the corresponding medium size style sheet does not exist, then **jtfucss_med.css** is used in its place. In this case, you can either make a copy of **jtfucss_med.css** and customize it, or you can modify your own style sheet to include the size differences mentioned above. Please note that the standard medium size branding background image is **jtf Fulnon_med.gif**.

1.9.1 Questions and Answers

Below are some frequently asked questions about branding:

What is the relationship between FND: Branding Size and JTF_PROFILE_DEFAULT_CSS?

There is no direct connection between **FND: Branding Size** and **JTF_PROFILE_DEFAULT_CSS**. **FND: Branding Size** specifies the size of the branding, while **JTF_PROFILE_DEFAULT_CSS** stores a style sheet name.

If `JTF_PROFILE_DEFAULT_CSS` contains a value `x.css`, then changing the value of `FND: Branding Size` might require the presence of `x_med.css` in the system.

As a developer or customer, what can I do with the branding area?

Besides changing its size by setting the profile, you can change the text:

The Branding screen in the CRM System Administrator Console allows you to set different text for different responsibilities or applications. The default text is "Oracle Applications".

As a customer, do I have to do something to support changing branding size?

Only if you want to support customized style sheets. The style sheets can be customized at different levels, but they are not necessarily for branding. If a site is set at a different branding size, then you might consider customizing the style sheets. For example, medium size branding has no global button icons . You can't make the icons appear with a customized style sheet. However, you could replace the the product logo background, which is defined in the style sheet.

1.10 Configuring Host Names for the Deployment

Please see [Section 6.4, "Setting Up Hosts"](#) for instructions on how to register and update the hosts of your deployment.

1.11 Enabling Distributed Caching

This is an optional procedure. For information, please see *OracleMetaLink* Note 226827.1.

1.12 Configuring the Cache Statistics Thread Interval

This is an optional procedure. For information, please see *OracleMetaLink* Note 226827.1.

Understanding the System Administrator Console

This topic group provides overviews of the System Administrator Console and its components as well as explanations of certain key concepts, features, and functions.

For a general introduction, please see the topic [System Administrator Console Overview](#).

2.1 System Administrator Console Overview

The System Administrator Console is a Web-based user interface that is associated with the system administrator responsibility. It is used during the development, implementation, and maintenance phases of an application or deployment. During the development phase, developers and consultants use the System Administrator Console to seed out-of-the-box capabilities and features. These include, but are not limited to, users, permissions, roles, session parameters, page flows, and diagnostic tests. During the implementation phase, consultants or implementation engineers use the System Administrator Console to configure out-of-the-box capabilities and features to meet the particular needs of each customer deployment. During the maintenance phase, IT professionals use the System Administrator Console to troubleshoot deployment problems, tune deployment performance, and monitor system activity.

The following topics describe some of the key concepts of the System Administrator Console:

[Understanding Security](#)

[Understanding the Interapplication Bar](#)

[Understanding Diagnostics](#)

[Understanding Cache](#)

[Understanding Declarative Page Flows](#)

[Understanding Declarative Components](#)

2.2 Understanding Security

In the **Security** subtab, which is located under the **Settings** tab, you can control access to application resources and view security-related alerts.

This section offers an introduction to Security Framework concepts. For step-by-step instructions on how to use the Security screens, please see the topic [Managing Security](#).

2.2.1 Terminology

The following table explains important Security concepts.

| Term | Definition |
|------------|--|
| Permission | <p>A permission is a unit of privilege that is granted to a user. It usually serves to grant a certain type of access to a resource. Resources are application elements such as JSP pages, objects, or methods of objects. A resource can have unique permissions for each way that it can be accessed. A permission is implemented as a string. If a resource is protected by a permission, then any user accessing the resource must have the permission required to access it. Permission names are case-sensitive.</p> <p>Permissions cannot be directly assigned to users. Instead, permissions are grouped into roles and roles are then assigned to users.</p> <p>In the Security subtab, you can view, create, and delete permissions. You can also specify which permissions are mapped to each role, and vice versa.</p> |

| Term | Definition |
|-------|--|
| Roles | <p>A role is a group of permissions which can be assigned to a user. Like permissions, roles are implemented as strings. Role names are not case-sensitive.</p> <p>For example, let's suppose there is a JSP page "abc.jsp" that requires the permission "PERM_ABC." A user logs in and tries to access abc.jsp, but he or she can't do that unless he or she has permission "PERM_ABC." You want the user to be able to access the page, so you assign the role "ROLE_ABC" (which contains permission "PERM_ABC") to the user. When given the appropriate role, the user is able to access the page.</p> <p>In the Security subtab, you can view, create, and delete roles. You can also specify which roles are mapped to each permission, and vice versa.</p> |

2.3 Understanding the Interapplication Bar

In the **Site Preferences** subtab, which is located under the **Settings** tab, you can set up the Interapplication Bar.

This section offers an introduction to Interapplication Bar concepts. For step-by-step instructions on how to use the Interapplication Bar screens, please see the topic [Setting Up the Interapplication Bar](#).

2.3.1 Terminology

The following table explains important Interapplication Bar concepts.

| Term | Definition |
|----------------------|--|
| Interapplication Bar | <p>The Interapplication Bar (also sometimes referred to as the Application Switcher) allows end users to seamlessly switch between applications within the E-Business Suite. It is a set of customizable links that displays at the top of every page in HTML-based CRM applications. Each customizable link is called a "navigation group."</p> <p>For example, a system administrator might want to create a navigation group called "Sales." In the System Administrator Console, he or she can map sales-related applications such as Sales Online, TeleSales, and Sales Compensation to the navigation group called "Sales." (Similarly, he or she could create a navigation group called "Marketing" and map applications such as Marketing Online, iMarketing, and Campaign Management to it.)</p> <p>When an end user logs in who has responsibilities for sales applications, the end user will see "Sales" as a link in the Interapplication Bar. In the Profile screens, the end user can configure which responsibility he or she wants to associate with the "Sales" navigation group. From then on, when the end user is working in the E-Business Suite, he or she can click the "Sales" link at any time to easily switch to his or her sales responsibility</p> |
| Navigation Group | <p>A navigation group is a customizable group of applications with defined responsibility settings. Each navigation group is represented as a link within the Interapplication Bar.</p> <p>In the Site Preferences subtab, you (as the system administrator) can map CRM applications into navigation groups. Additionally, from the navigation group setup screen, you can create, delete, activate, deactivate, and specify the display order of navigation groups.</p> <p>After you have set up navigation groups for a deployment, based on their granted responsibilities, end users will be able to associate each navigation group with one of their responsibilities.</p> |

2.4 Understanding Diagnostics

When you click the **Diagnostics** tab of the System Administrator Console, you launch the Web-based interface of the Oracle Diagnostics for Applications. These Diagnostics screens are intended to help you identify and resolve problems related to environment, postinstallation setup, customization, or any other functions. In addition, Oracle Diagnostics generates reports which can be sent to Oracle Support for further analysis and troubleshooting, if needed. Note that you must be logged in

as a system administrator (with the permission "JTF_DIAGNOSTICS_ADMIN") in order to view any configuration-related Diagnostics screens.

In the Diagnostics screens, you perform tasks such as registering tests, executing tests, managing test groups, setting default test input values, registering applications with Oracle Diagnostics, and viewing log records.

This section explains important Oracle Diagnostics concepts. For step-by-step instructions on how to use the Diagnostics screens, please see [Using Diagnostics](#).

2.4.1 Terminology

The following table explains important Oracle Diagnostics for Applications concepts.

| Term | Definition |
|---------------|--|
| Test | <p>A test, written in Java or PL/SQL, checks the correct behavior of a particular feature or function.</p> <p>In the Diagnostics screens, you can run, register, delete, and set default input values for tests.</p> |
| Test Group | <p>A test group is a set of related tests. A test group may have other test groups defined as prerequisites.</p> <p>In the Diagnostics screens, you can run, create, modify, and remove test groups.</p> |
| Advanced Mode | <p>When running tests in advanced mode, you can supply specific input values for a diagnostic test.</p> <p>In the Diagnostics screens, you can run tests in either Advanced Mode or Basic Mode.</p> |
| Basic Mode | <p>When running tests in basic mode, you do not supply any input values before the test executes. This is because the test either requires no input values or has a preconfigured set of input values.</p> <p>In the Diagnostics screens, you can run tests in either Advanced Mode or Basic Mode.</p> |

| Term | Definition |
|------------------|---|
| Prerequisite | <p>Prerequisites are a concept that applies to both applications and test groups. Setting prerequisites is sometimes necessary for procedures to execute correctly.</p> <p>For example, the DBConnections test group has the Environment Setup test group set as its prerequisite, because the Environment Setup test group contains the DBC Parameter test which checks the DBC file. If the DBC Parameter test fails, the no tests in the DBConnections test group will be successful.</p> <p>In addition, the CRM Foundation application has the HTML Platform application set as its prerequisite. If some tests for CRM Foundation fail, it is likely due to an error in the HTML Platform. Therefore you can run the HTML Platform tests to trace the problem.</p> <p>In the Diagnostics screens, you can define prerequisites for applications as well as test groups.</p> |
| Diagnostic Role | <p>To secure diagnostic tests which may deal with sensitive information, you can associate user responsibilities with Diagnostic Roles. Currently the Diagnostic Roles available are Super User, Application Super User, and End User. In order to have unrestricted access to all Diagnostic features such as configuration and viewing test details, a user must have the Super User Diagnostic Role. For more details, see the section "Diagnostic Security" below.</p> |
| Test Sensitivity | <p>For security reasons, diagnostic tests are shipped with a test sensitivity of low, medium, or high. Diagnostic Roles (see above) can be configured to allow only certain users to execute tests, based on the test's sensitivity. For more details, see the section "Diagnostic Security" below.</p> |

2.4.2 Diagnostic Security

As diagnostics tests can report on sensitive aspects of an application, such as finance-related modules, it is necessary to limit access to sensitive data to only the users who have been explicitly authorized. In order to address this, test developers can now assign their tests a sensitivity rating of low, medium, or high. Furthermore, Diagnostic Roles are provided to define which operations different types of users can perform within Oracle Diagnostics.

The Diagnostic Roles are defined as follows:

Diagnostics Super User

Has unrestricted and global privileges for all Diagnostics operations. A user with this role can execute, configure, view reports, and set up security for all test groups and all applications. Prior to shipment, this role has been granted to the **CRM Foundation** application responsibility **CRM HTML Administration**, which has been assigned to the user **sysadmin**. If you are performing security setup or other configuration tasks, you must log on as a user who has the **CRM HTML Administration** responsibility.

Application Super User

For the application associated with this user's responsibility, he or she can execute, configure, view reports, and set up security for the test groups in his or her own application. Additionally, the user can execute tests and configure test inputs for test groups of other applications which are of low or medium sensitivity.

End User

The only operations this user can perform are executing and configuring inputs for for low-sensitivity test groups. He or she cannot view detailed test reports.

Anonymous User

This role is not explicitly defined, but in the case that none of a user's responsibilities have an association with any of the above Diagnostic Roles, then the user is considered an anonymous user. Such users can only access the pseudo-application **HTML Platform**. They cannot work with the test groups of any other applications.

Note: Through the Diagnostics screens, you can explicitly grant any responsibility the ability to access a particular test group. In such cases, the user can then execute and configure inputs for tests belonging to that test group, as well as view detailed reports.

The following table lists the different abilities of the four Diagnostic Roles.

| Task | Diagnostic Super User | Application Super User | End User | Anonymous User |
|-------------------|-----------------------|------------------------|----------|----------------|
| Use LogViewer tab | Yes | Yes | No | No |

| Task | Diagnostic Super User | Application Super User | End User | Anonymous User |
|--|-----------------------|---|-----------------------------|--------------------|
| Perform security configuration | Yes | For test groups of own application | No | No |
| Configure applications | Yes | For own application | No | No |
| View detailed reports | Yes | Yes | No | No |
| Configure test inputs | Yes | For own application and low or medium sensitivity test groups of other applications | Low sensitivity test groups | HTML Platform only |
| Send e-mail and print detailed reports | Yes | Yes | Summarized reports | HTML Platform only |
| HTML Platform | Yes | Yes | Yes | Yes |

2.4.3 Alternative Launchpads

The System Administrator Console is one of several places where you can access the Diagnostics screens. The other "launchpads" are described below.

URLs

The following URL can be used to access the Diagnostics screens. It is particularly useful if a deployment is experiencing startup problems:

`http://<hostname>:<portnumber>/OA_HTML/jtfqalgn.htm`

Oracle Applications Manager

As of release 11.5.9, you can access Diagnostics screens through Oracle Applications Manager. Clicking the **Diagnostics** dashboard subtab in Oracle Applications Manager displays summaries of diagnostic test statistics and log data. To launch the Diagnostics screens, click **Launch Diagnostics**.

2.4.4 Database Failover

If the database is down (that is, cannot be read from or written to), then report entries are stored locally on the file system. All test results for that diagnostic session go to the file system, even if the database comes up at some point in the

session. If the database stays up, then the log entries will go to the database the next time a session is started.

Report files are only created if the database is down. In this case, they are generated in the directory specified by the following `-D` parameter to the JServ:

```
-Dframework.Logging.system.filename=<some writeable directory>
```

This directory must be writable. When the database is down, there will be one file per diagnostic session.

2.4.5 Command-Line Console

The Web-based Diagnostics screens are not the only interface to Oracle Diagnostics; there is also the Command-Line Console. The Command-Line Console uses a guest user login at a UNIX or Windows prompt. It is typically used during development or during installation when you need to run regression tests to verify if different aspects of the system are still functioning after a patch has been installed.

Naturally, you will not be permitted to access any configuration-related functionality over the Command-Line Console, since you are implicitly authenticated as a guest user. This is necessary to keep the data registered with the framework secure.

You can launch the Command-Line Console by using the command below:

```
java -DJTFDBCFILE=<dbc file> -Dframework.Logging.system.filename=<framework  
logfile>  
-Dservice.Logging.common.filename=<service logfile>  
oracle.apps.jtf.regress.qatool.QAConsole
```

You need to do the following in this command:

- Specify the dbc file.
- Specify the locations of the framework and service log files.
- Ensure that the classpath being used has `apps.zip`, `jdbc12.zip`, and `jsdk.jar`.

2.5 Understanding Cache

In the **Cache** subtab, which is located under the **Performance** tab, you can manage cache-related settings. This section offers an introduction to Cache concepts. For step-by-step instructions on how to use the cache screens, please see [Using Cache](#).

2.5.1 Terminology

The following table explains important Cache concepts.

| Term | Definition |
|-----------------|--|
| Cache | <p>A data structure that holds frequently used Java objects. It is composed of component caches. A component cache holds all the Java objects belonging to an application component. An application component pertains to specific application functionality.</p> <p>In the Cache subtab, you can manage cache policies, manage cache filters, manage component caches, and view cache statistics. Elsewhere in the Resource Settings subtab, you can set the maximum size of the cache.</p> |
| Policy | <p>A setting that applies to an application running on a host. The policy types are Cache Only, Cache and Priming, Disabled, and Custom.</p> <p>In the Cache subtab, you can set up cache policies.</p> |
| Filter | <p>An application-specific component that indicates what responsibility IDs and language codes to prime for.</p> |
| Component Cache | <p>A data structure that holds the Java objects of an application module pertaining to a specific application functionality. For example, Catalog and MenuRenderer are components that have component caches.</p> <p>In the Cache subtab, you can view, create, modify, and remove component caches.</p> |
| Statistics | <p>A dedicated screen under the Cache subtab offers a display of component cache performance metrics.</p> |

2.6 Understanding Declarative Page Flows

In the **Declarative Page Flow** subtab, which is located under the **Design** tab, you can set up and manage the components of the Declarative Page Flows Framework: Physical Pages, Logical Pages, Rules, and Business Flows.

This section offers an introduction to Declarative Page Flow concepts. For step-by-step instructions on how to use the Declarative Page Flows screens, please see [Using Declarative Page Flows](#).

2.6.1 Overview

The Declarative Page Flows Framework enables you to customize, upgrade, and troubleshoot the content and flow of JSPs within an application without making any modifications to actual code. The Declarative Page Flows Framework is based on the abstraction of JSPs into named logical entities. Consequently, you can achieve efficient management of content and flows by utilizing the screens provided in the System Administrator Console.

2.6.2 Terminology

The following table explains important Declarative Page Flow concepts.

| Term | Definition |
|---------------|---|
| Physical Page | <p>The name of a JavaServer Page (JSP).</p> <p>In the Declarative Flows subtab, you can view, register, and modify Physical Pages.</p> |
| Logical Page | <p>A named logical entity that has one or more Physical Pages mapped to it. Usually, each Logical Page represents a node within a Business Flow.</p> <p>In the Declarative Flows subtab, you can view, create, and modify Logical Pages.</p> |
| Rule | <p>A rule is defined by parameters and conditions and determines which Physical Page needs to be rendered or which Logical Page needs to display next. Rules evaluate to true when all of their conditions evaluate to true. You can utilize Rules to customize the page-to-page behavior of a Business Flow.</p> <p>In the Declarative Flows subtab, you can view, create, and modify Rules.</p> |
| Business Flow | <p>A sequential set of linked Logical Pages that usually corresponds to a business task. Business Flows can be linear or nonlinear, depending on whether or not there are context-sensitive conditions. Branching conditions are evaluated at each node.</p> <p>In the Declarative Flows subtab, you can view, create, modify, clone, and preview Business Flows.</p> |

| Term | Definition |
|---------------|---|
| Flow Cloning | <p>In order to facilitate the easy upgrade of business flows which have been customized by a customer, a business flow can be cloned, thus creating a Flow Family of related business flows.</p> <p>In the Declarative Flows subtab, the Clone Flow screen allows you to generate duplicates of a given flow.</p> |
| Flow Families | <p>A flow family consists of an original business flow, a clone of the original business flow, and any customized clones which have been made.</p> <p>In the Declarative Flows subtab, the Flow Families screen allows you to view the contents of a Flow Family and select which flow is active.</p> |

2.7 Understanding Declarative Components

In the Declarative Components subtab, which is located under the Design tab, you can create and manage declarative UI components (Bins, Graphs, Reports, Graph/Report combinations, and LOVs) and their security settings.

This section offers an introduction to Declarative Components concepts. For step-by-step instructions on how to use the Declarative Components screens, please see [Using Declarative Components](#).

2.7.1 Overview

The Declarative Components Framework allows you to quickly build UI components that display application-specific data in personalizable Bins, Graphs, Reports, Graph/Reports, or LOVs. The coding requirements are minimal to nonexistent and the components can be published on Oracle applications.

2.7.2 Terminology

The following table explains important Declarative Components concepts.

| Term | Definition |
|----------|---|
| Metadata | <p>The Declarative Components Framework relies on the accurate definition of metadata. The framework uses the metadata to capture information about component headers, footers, columns, and other attributes.</p> <p>In the Declarative Components subtab, you can define the metadata for bins, reports, graphs, graph/report combinations, LOVs, and parameters.</p> |
| Bin | <p>Bins are small reports which display high level summary information in a tabular format. They generally display information regarding a single metric, such as "time period." If enabled and the appropriate security features are assigned, you can choose which bins to display on the home page and also choose the order in which multiple bins are displayed.</p> <p>In the Declarative Components subtab, you can view, create, modify, and remove Bins.</p> |
| Report | <p>Reports are similar to bins. They display information in a tabular format.</p> <p>In the Declarative Components subtab, you can view, create, modify, and remove Reports. Optionally, you can do the same for Graph/Report combinations.</p> |
| Graph | <p>A graph is a diagram that represents data pictorially.</p> <p>In the Declarative Components subtab, you can view, create, modify, and remove Graphs. Optionally, you can do the same for Graph/Report combinations.</p> |
| LOV | <p>The LOVs that you create can be used across applications.</p> <p>LOV means "list of values." It is a UI component that facilitates the completion of a text entry field when there are numerous values that may be assigned. LOVs are a useful alternative to drop-down lists, particularly in cases where displaying a long list of selections in a drop-down list would require excessive scrolling.</p> <p>In short, when using a LOV to complete a text entry field, you type a query into the field and then click a button labeled "Go." This opens a screen where you view a list of values that match the query you submitted. You can then select the value that you desire and return to the original screen, where what you selected will populate the original text entry field.</p> <p>In the Declarative Components subtab, you can view, create, modify, and remove LOVs.</p> |

Using the Security Subtab

3.1 Managing Security

You can perform the following tasks from the **Security** subtab:

- [Viewing Security Alerts](#)
- [Managing Permissions](#)
 - [Creating Permissions](#)
 - [Assigning a Permission to Roles](#)
- [Managing Roles](#)
 - [Creating Roles](#)
 - [Mapping Permissions to a Role](#)

For an introduction to Security concepts, please see [Understanding Security](#).

3.2 Managing Permissions

Use this procedure to manage permissions. A permission has a name and a description. For an introduction to permissions and roles, please see [Understanding Security](#).

WARNING! Do not remove the predefined permissions that are built into the System Administrator Console. These predefined permissions are essential for stable and reliable performance of all Oracle CRM modules. Removal of these permissions could cause serious or fatal performance problems.

Steps

1. In the **Settings** tab, navigate to **Security > Access Controls > Permissions**.
2. If you want to create a new permission, then click **Create**. This opens the page where you edit the details of a new permission.
3. If you want to search for a permission, then:
 - a. Type a search phrase into the **Find Permission** field.
 - b. Click **Go** to display the search results.
4. To change which rows display in the table, you have the following options:
 - a. Click the **Previous** or **Next** buttons.
 - b. Choose an entry range from the drop-down list.
5. If you want to assign a permission to roles, then click the name of a permission in the table. This opens the page where you assign a permission to roles.
6. If you want to delete a permission, then:
 - a. Select the appropriate check box in the **Remove** column of the table.
 - b. Click **Update** to save. The permission is removed.

Related Procedures

[Creating Permissions](#)

[Assigning a Permission to Roles](#)

[Managing Security](#)

3.3 Creating Permissions

Use this procedure to create a new permission. For an introduction to permissions and roles, please see [Understanding Security](#).

Steps

1. In the **Settings** tab, navigate to **Security > Access Controls > Permissions**, then click **Create**.
2. Type a new permission name into the **Name** field. The first two or three letters of a permission name correspond to the module shortcode. Permission names must be unique.

3. Type a description of the permission into the **Description** field.
4. Click **Create** to save your work. The new permission is filed in alphabetical order.

Related Procedures

[Managing Permissions](#)

[Assigning a Permission to Roles](#)

[Managing Security](#)

3.4 Assigning a Permission to Roles

Use this procedure to assign a permission to one or more roles. For an introduction to permissions and roles, please see [Understanding Security](#).

Steps

1. In the **Settings** tab, navigate to **Security > Access Controls > Permissions**, then click the name of a permission in the table.
2. Choose the name of a role in one list and click **>** or **<** to move it to the other list.
3. Repeat step 2 as desired.
4. If you want to move all items from the **Available Roles** list to the **Assigned Roles** list, then click **>>**. This assigns the permission to all roles.
5. If you want to move all items from the **Assigned Roles** list to the **Available Roles** list, then click **<<**. This removes the permission from all roles.
6. Optionally, click **Restore** to reset the fields to their original values.
7. Click **Update** to save. The permission will be assigned to the roles specified in the **Assigned Roles** list.

Related Procedures

[Creating Permissions](#)

[Managing Permissions](#)

[Managing Security](#)

3.5 Managing Roles

Use this procedure to manage roles. A role is a grouping of one or more permissions. For an introduction to permissions and roles, please see [Understanding Security](#).

Steps

1. In the **Settings** tab, navigate to **Security > Access Controls > Roles**.
2. If you want to create a new role, then click **Create**. This opens the page where you edit the details of a new role.
3. If you want to search for a role, then:
 - a. Type a search phrase into the **Find Role** field.
 - b. Click **Go** to display the search results.
4. To change which rows display in the table, you have the following options:
 - a. Click the **Previous** or **Next** buttons.
 - b. Choose an entry range from the drop-down list.
5. If you want to map permissions to a particular role, then click an entry in the **Name** column of the table. This opens the page where you map permissions to a role.
6. If you want to delete a role, then:
 - a. Select the appropriate check box in the **Remove** column of the table. If the check box is disabled, then you cannot remove the role. For example, seeded roles are not deleteable.
 - b. Click **Update** to save.
 - c. You will be asked to confirm that you want to delete the role. To cancel, click **Cancel**. To delete the role, click **Update**.

The role is removed and revoked from all users who are assigned to the role.

Related Procedures

[Creating Roles](#)

[Mapping Permissions to a Role](#)

[Managing Security](#)

3.6 Creating Roles

Use this procedure to create a new role. For an introduction to permissions and roles, please see [Understanding Security](#).

Steps

1. In the **Settings** tab, navigate to **Security > Access Controls > Roles**, then click **Create**.
2. Type a new role name into the **Name** field.
The first two or three letters of a role name correspond to the module shortcode. Role names must be unique.
3. Type a description of the role into the **Description** field.
4. Click **Create** to save. The new role is filed in alphabetical order.

Related Procedures

[Mapping Permissions to a Role](#)

[Managing Roles](#)

[Managing Security](#)

3.7 Mapping Permissions to a Role

Use this procedure to map permissions to a role. A role is a grouping of one or more permissions. For an introduction to permissions and roles, please see [Understanding Security](#).

Steps

1. In the **Settings** tab, navigate to **Security > Access Controls > Roles**, then click the name of a role in the table.
2. Choose the name of a permission in one list and click > or < to move it to the other list.
3. Repeat step 2 as desired.
4. If you want to move all items in the **Available Permissions** list to the **Assigned Permissions** list, then click >>. This assigns the role to all permissions.
5. If you want to move all items in the **Assigned Permissions** list to the **Available Permissions** list, then click <<. This removes the role from all permissions.

6. Click **Update** to save.

Related Procedures

[Creating Roles](#)

[Managing Roles](#)

[Managing Security.](#)

Using the Site Preferences Subtab

4.1 Setting Up the Interapplication Bar

You can perform the following tasks from the Site Preferences subtab:

- [Setting Up Navigation Groups](#)
- [Editing Navigation Group Details](#)

For an introduction to the Interapplication Bar, please see the topic [Understanding the Interapplication Bar](#).

4.2 Setting Up Navigation Groups

Use the following procedure to set up navigation groups, which represent customizable sets of applications with defined responsibility settings. They act as links in the Interapplication Bar. The Interapplication Bar is the set of navigation groups that displays at the top of every page in HTML-based CRM applications. For an introduction to the Interapplication Bar, please see the topic [Understanding the Interapplication Bar](#).

Steps

1. In the **Settings** tab, navigate to **Site Preferences > Interapplication Bar > Navigation Group Setup**.
2. To create a new navigation group, do the following:
 - a. Type a name and description into an empty row in the table.
 - b. In the **Status** column, choose **Active** from the drop-down list if you want the navigation group to display in the Interapplication Bar. Choose **Inactive** if you do not want it to display.

- c. In the **Display Order** column, use the drop-down list to select the navigation group's placement in the Interapplication Bar.

If a navigation group called "Sales" is has a display order of **0**, one called "Marketing" has a display order of **1**, and another called "Service" has a display order of **2**, then the Interapplication Bar will look like the following: **Sales Marketing Service**, provided the end user has responsibilities within all three navigation groups. (For example, if the end user does not have any responsibilities for service applications, then he or she will not see **Service**.) (Note that if your deployment is in a language that reads from right to left, then **0** will set the navigation group at the far right hand side of the screen, and so on.)

- d. Click **Update** to save your work.
 - e. Click the icon in the **Detail** column to map CRM applications to this navigation group.
3. To edit an existing navigation group, please see steps 2b - 2e.
 4. To delete a navigation group from the table, do the following:
 - a. Select the check box in the **Remove** column that corresponds to the navigation group that you want to delete.
 - a. Click **Update**.

Related Procedures

[Editing Navigation Group Details](#)

4.3 Editing Navigation Group Details

Use this procedure to map CRM applications to navigation groups. A navigation group is a customizable set of applications with defined responsibility settings that is launched when you click its link in the Interapplication Bar. The Interapplication Bar displays at the top of every page in HTML-based CRM applications. For an introduction to the Interapplication Bar, please see the topic [Understanding the Interapplication Bar](#).

Steps

1. There are two ways to access this page:
 - In the **Settings** tab, navigate to **Site Preferences > Interapplication Bar > Navigation Group Details**.

- In the **Settings** tab, navigate to **Site Preferences > Interapplication Bar > Navigation Group Setup**, then click the icon in the **Detail** column that corresponds to the navigation group you are working with.
2. If you came to this page by way of the first method above, then you will need to choose a navigation group from the drop-down list before you can begin selecting applications.
3. Choose the name of an application in one list and click > or < to move it to the other list.
4. Repeat step 3 as desired.
5. If you want to move all **Available Applications** to the **Selected Applications** list, then click >>.
6. If you want to move all **Assigned Applications** to the **Selected Applications** list, then click <<.
7. Click **Update** to save.

Related Procedures

[Setting Up Navigation Groups](#)

Using the System Subtab

5.1 Using the System Subtab

In the System subtab, you can define the system level properties that you need to set up during deployment. You can reconfigure the properties later as necessary.

You can perform the following tasks from the System subtab:

- [Setting Up Sessions](#)
- [Setting Up Cookies](#)
- [Setting Up Branding](#)
- [Setting Up the Self Service User](#)
- [Setting Up Property Categories](#)
- [Managing Properties](#)
- [Editing the Details of Keys](#)
- [Setting Up Debug Logging](#)
- [Viewing the Debug Log](#)
- [Setting Up Page Flow Logging](#)
- [Viewing Page Flow Logging Reports](#)

5.2 Setting Up Sessions

Use this procedure to set up sessions. Sessions are a system property that carries user identity and credentials throughout the duration of a user's activity. For security purposes, user sessions can be set to expire according to three rules:

- A specified number of hours has passed since the session began.
- A specified number of minutes has passed since the user's last activity, such as clicking a button. This setting is intended to prevent unauthorized users from taking advantage of an unattended session.
- A specified number of "hits" have occurred during the session. A hit means a user action such as submitting a query or clicking a link. This setting is also intended to limit damage in case of an intrusion.

Sticky Sessions are a special kind of session. When using Sticky Sessions, all requests from the same user session will attempt to go to the same JVM, regardless of whether the application is in stateless mode or stateful mode. Sticky Sessions allow for several performance enhancements. In particular, the hit ratio of middle tier caching is improved because all cached data for a particular user resides on a single JVM rather than being scattered across different JVM instances. In addition, session attributes and resources will not have to be recreated and duplicated across different JVMs, but can be reused in the JVM associated with the session.

Connection Reuse refers to the sticky connection that is remembered in the sticky session. Turning on connection reuse means that if the JVM finds an open connection in the connection pool, then it can reuse the connection.

Saved Cursor Idle Time refers to the maximum time an active open cursor can be idle before the cursor connection is closed.

Steps

1. In the **Settings** tab, navigate to **System > Properties > Sessions**.
2. In the **User Sessions** area, you can specify how many hours pass before an active session expires, how many minutes pass before an idle session expires, and the maximum number of hits allowed per session.
3. In the **Sticky Sessions** area, you can turn Sticky Sessions on or off, specify how many minutes pass before a session expires, turn Connection Reuse on or off, and specify the saved cursor idle time.
4. Click **Update** to save your work.

Related Procedures

[Using the System Subtab](#)

5.3 Setting Up Cookies

Use this procedure to set up cookies. Cookies are a system property that stores session information about users and systems.

Steps

1. In the **Settings** tab, navigate to **System > Properties > Cookies**.
2. Use the drop-down list labeled **Mode** to set whether a browser cookie or URL rewriting is used.

Browser cookies are the recommended setting, for the following reasons:

- A cookie stores up to 4K of data, while a URL can only store 2K of data.
 - Using URL rewriting prohibits any customizations that rely on cookies. For example, some customized pages in the iStore application rely upon a cookie.
3. Type the encryption key into the **Encryption Key** field. Encryption keys are a means to protect the information stored in cookies. A key is usually an alphanumeric string of twenty to thirty characters.
 4. Type a number into the **Expiration Time** field. This is the number of expiration units (time intervals) that pass before the cookie expires. Set the expiration unit below.
 5. Choose **Day(s)**, **Hour(s)**, or **Minute(s)** from the **Expiration Unit** drop-down list.
 6. Click **Update** to save.

Related Procedures

[Using the System Subtab](#)

5.4 Setting Up Branding

Branding refers to the images that appear at the top of Web-based application pages. Branding includes elements such as a corporate logo, an application name, or a product collage image.

Branding Size

There are three size options for branding: regular, medium, and small. Regular branding is larger than the other two options, and in regular branding the global links display as round icons rather than text-only hyperlinks. Medium branding is

more compressed in size than regular branding, and small branding is even more compact. For information on how to set branding size, please see <FIXME> Section X.X, "Topic Heading."

Branding Text

Optionally, you can customize the branding text once the application has been deployed at a customer site. The branding text can be defined at both application level and responsibility level. A responsibility can only belong to one application, and an application can have multiple responsibilities. If the branding text for a particular responsibility is not set, then the branding text for all responsibilities within the application will be used. If the branding text for a particular responsibility is set, then that branding text will take precedence and override the branding text that is set at application level.

For example, for the application CRM Foundation, you could set the branding text to "Admin Console" at application level (the default for all responsibilities). Given two CRM Foundation users, one with the CRM Administrator responsibility and the other with the HTML Foundation User responsibility, when they log in, both will see "Admin Console."

However, if you customize the branding text for the HTML Foundation User responsibility to "HTML User," then when those users log in they will see "HTML User." Users having the responsibility CRM Administrator will still see "Admin Console."

Steps

1. In the **Settings** tab, navigate to **System > Properties > Branding**.
2. Choose an application from the **Application Name** drop-down list.
3. Choose which responsibility applies to the branding from the **Responsibility Name** drop-down list. In some cases, you may only have one option, **Default Branding for this Application**.
4. Type into the **Branding Name** field to set the branding.
5. Click **Update** to save.

The page refreshes to display a preview of the new branding.

Related Procedures

[Using the System Subtab](#)

5.5 Setting Up the Self Service User

Use this procedure to set up the self service user. You must set up the self service user after deploying applications. The self service user is also known as the "guest user." It represents an internal user who is granted certain responsibilities and permissions so that new users can be given the appropriate responsibilities and permissions during the self-registration process.

Steps

1. In the **Settings** tab, navigate to **System > Properties > Self Service User**.
2. Enter a name for the self service user and set a password. All three fields are required.
3. Click **Update** to save.

Related Procedures

[Using the System Subtab](#)

5.6 Setting Up Property Categories

Use this procedure to set up applications in the system properties framework. In this procedure, you will assign roles to have either read or update permission for a given application (AKA category). For an introduction to permissions and roles, please see [Understanding Security](#).

Steps

1. In the **Settings** tab, navigate to **System > Properties > Category**.
2. Choose an application from the **Application Name** drop-down list.

Note: This list displays the full names of applications (for example, "Oracle Enterprise Asset Management"). However, in the Properties screen where you manage properties, the drop-down list displays only the abbreviated application shortname (such as "EAM")

3. Choose **Read** or **Update** from the **READ/UPDATE** drop-down list, depending on what type of permission you will be granting.
4. Click **Next**. This opens the page where you can map the permission to one or more roles.

Related Procedures

[Assigning a Permission to Roles](#)

[Using the System Subtab](#)

5.7 Setting Up Password Expiration

Note: This page no longer controls password expiration.

5.8 Managing Properties

Use this procedure to manage properties. A property is a key/value pair that is application-specific. A key is what is used by an application to retrieve data. Keys are unique, but can have multiple values. Values are the content or data that binds to a particular key. You can view, create, modify, delete, and copy properties.

Steps

1. In the **Settings** tab, navigate to **System > Properties > Advanced**.
2. Choose an application shortname from the **View** drop-down list. The page will refresh to display the properties registered for that module.

If your desired application shortname does not appear in the drop-down list, you will need to do the procedure [Setting Up Property Categories](#).
3. If you want to create a key, then click **Create**. This opens the page where you specify the details of a new key.
4. If you want to view or modify the details of a key, then click a key name in the table. This opens the page where you view or edit the details of an existing key.
5. If you want to remove a key, then:
 - a. Select the appropriate check box in the **Remove** column of the table.
 - b. Click **Update** to save.

Related Procedures[Editing the Details of Keys](#)[Using the System Subtab](#)

5.9 Editing the Details of Keys

Use this procedure to edit the details of new or existing keys. A property is a key/value pair that is application-specific. A key is what is used by an application to retrieve data. Keys are unique, but can have multiple values. Values are the content or data that binds to a particular key.

Steps

1. In the **Settings** tab, navigate to **System > Properties > Advanced**, then either click **Create** or click the name of a key in the table.
2. Type a key name into the **Key** field.
3. Edit the table.
 - a. Type values into the **Value** fields as desired.
 - b. Type sequence numbers into the **Sequence** fields as desired.
 - c. If you want to remove a value, then select the appropriate check box in the **Remove** column.
 - d. Optionally, click **More Rows** to add empty rows to the table.
4. If you want to resequence the key, then click **Resequence**.
5. If you want to copy the key, then click **Copy Key**.
6. If you are creating a new key and want to clear the fields, then click **Clear**.
7. If you are editing an existing key and want to restore the fields to their original settings, then click **Restore**.
8. Click **Update** to save.

Related Procedures[Managing Properties](#)[Using the System Subtab](#)

5.10 Setting Up Debug Logging

Use this procedure to set up debug logging. Debug logging allows messages to be logged to a central repository at runtime. The logged messages can be viewed for troubleshooting purposes. The repository is shared by both the database and the middle-tier servers.

Please note that this UI screen sets up logging at the site level only. If desired, you can configure more specific logging at the application, responsibility, or user levels in the Forms Profiles UI.

Steps

1. In the **Settings** tab, navigate to **System > Properties > Debug Logging > Configuration**.
2. In the **Enabled** field, you can turn debug logging on or off.
3. In the **Level** field, you select what severity of messages will be logged. Only messages with a level equal to or greater than the specified level will be logged. Level 1 messages have low severity, such as "Obtained Connection From Pool." Level 2 messages occur upon entry and/or exit from a method, such as "Leaving MyClass.myMethod()." Level 3 messages are significant in the normal execution path of an application, such as "Retrieved User Preferences Successfully." Level 4 messages occur when a lower level API is returning a failure code or exception, but the error does not necessarily indicate a problem at the level of the calling code. For example, "Profile not found." Level 5 messages are error messages to users, such as "Invalid username or password." Level 6 messages occur when an unexpected situation has occurred which is likely to indicate or cause instabilities in the runtime behavior, and the system administrator should take action to address the situation. For example, "Configuration error - required property not set, cannot access configuration file."
4. In the **Repository** field, you can set either the database or a file as the log repository. If you select **File**, you must specify a complete file path in the **Filename** field below.

Note: Only messages that are logged to the database repository are searchable in the UI. Messages that are logged to a file are not searchable in the UI.

5. In the **Module Filter** field, you can set up a module filter. A module filter is an optional comma-delimited list or strings that you can configure to permit logging for a specific group of modules. The wildcard character (%) is permitted. An example module filter might be: "fnd%, jtf%, %store%." Or to select all modules, use "%."
6. Click **Update** to save your configuration.
7. Restart your middle-tier server.

Related Procedures

[Viewing the Debug Log](#)

[Using the System Subtab](#)

5.11 Viewing the Debug Log

Use this procedure to search for, view, download, and/or purge the messages generated from debug logging.

Steps

1. In the **Settings** tab, navigate to **System > Properties > Debug Logging > Messages**.
2. To search for messages, do one or more of the following:
 - a. To limit the messages displayed to a specific date range, use the date picker widgets provided in the **From** and **To** fields.
 - b. To set which logging levels are displayed, choose a level from the **Level** drop-down list. Check the check box next to the field to include higher (more severe) messages as well. Please see [Setting Up Debug Logging](#) for details about logging levels.
 - c. To limit the messages displayed to a particular node, choose a host name from the **Node** drop-down list.
 - d. In the **JVM** field, you can specify the ID of the Java process where the message was generated.
 - e. In the **Thread** field, you can specify the ID of the thread within the Java process where the message was generated.

- f. In the **Module** field, you can specify the source code origin of the message. Typically in Java this is the full class name. When a class name begins with "oracle.apps." the leading "oracle.apps." is dropped in the logged message. For example, "oracle.apps.jtf.util.Encoder" will be logged as "jtf.util.Encoder."
- g. In the **User** field, you can specify the user name of the application user who was active when the message was logged.
- h. In the **Message** field, you can specify a particular log message that you want to search for.
- i. In the **Session** field, you can specify a session ID.
- j. Optionally, you can select the **View Details** check box to show expanded information in the log display below. If unchecked, the message table on this screen will have the following columns:
 - Seq
 - User
 - Level
 - Timestamp
 - Module
 - Message

If checked, then the message table on this screen will have the following columns:

- Seq
- User
- Level
- Timestamp
- Session
- Node
- JVM
- Thread
- Module
- Message

- k. Click **View Log** to display messages.
3. To download the logged messages as a space-delimited text file, click **Download Log**.
4. To purge logged messages, click **Purge Log**. This purges the log based on the criteria you have specified in the above fields. As the system administrator, you should periodically rotate or remove the log files as necessary.

Related Procedures

[Setting Up Debug Logging](#)

[Using the System Subtab](#)

5.12 Setting Up Page Flow Logging

Use this procedure to configure page flow logging.

Steps

1. In the **Settings** tab, navigate to **System > Properties > Page Flow Logging > Configuration**.
2. To turn page flow logging on or off, use the **Enabled** drop-down list.
3. To specify which request attributes to log, check or uncheck the check boxes in the **Select Request Attributes to Log** area. You can choose to log one or more of the following request attributes for each application page that is accessed:
 - Client browser information
 - Application parameters
 - Client language (character encoding, language, character set)
 - JTF session cookie
 - All other incoming HTTP headers
 - All other incoming cookies
4. In the **Only log these Applications** area, you can specify which applications are logged. Use the arrow buttons to move application names between the **Disabled** list and the **Enabled** list.

5. In the **Only log these Business Flows** area, to specify which business flows are logged. Use the arrow buttons to move application names between the **Disabled** list and the **Enabled** list.
6. Click **Update** to save. Configuration changes will take effect when all the JVMs that use page flow logging are restarted.

Related Procedures

[Viewing Page Flow Logging Reports](#)

[Migrating Page Flow Data](#)

[Setting Page Flow Buffer Size and Flush Interval](#)

[Using the System Subtab](#)

5.13 Viewing Page Flow Logging Reports

Use this procedure to view page flow logging reports.

Note: You must migrate the page flow data from a staging area to the mining area before the materialized views can be refreshed for UI reports. Please see the procedure [Migrating Page Flow Data](#).

Steps

1. To view the screen which displays the reports, in the **Settings** tab, navigate to **System > Properties > Page Flow Logging > Reports**.
2. Consult the tables provided to view data about application usage and middle-tier usage.
3. Optionally, to customize the dates that display in a table, click **Edit**. Using the date picker widgets provided, choose your desired date range and click **Update** to save.
4. If desired, you can drill down into the generated report table to view detailed reports on page hits, sessions, and users.

Related Procedures

[Setting Up Page Flow Logging](#)

[Migrating Page Flow Data](#)

Setting Page Flow Buffer Size and Flush Interval

Using the System Subtab

5.14 Migrating Page Flow Data

Use this procedure to migrate page flow data. Page flow data is logged in the database in a staging area. This data needs to be migrated to the mining area before the materialized views can be refreshed for the UI reports.

Steps

1. Log in to Forms (JInitiator) with the **CRM Administrator, Vision Enterprises** responsibility.
2. Navigate to **Concurrent > Requests**.
3. Double-click **Requests**.
4. Click **Submit a New Request** or **Run**.
5. Select **Request Set**.
6. Click **OK**.
7. In the **Request** field, enter **Page Flow**. Then press the Tab key on your keyboard to select **Page Flow Data Migration and Refresh**.
8. Schedule and submit the request.

After the Concurrent Request-Set completes, you should be able to view the latest data reports and statistics in the System Administrator Console UI. To do so, please see the procedure [Viewing Page Flow Logging Reports](#).

Related Procedures

[Setting Up Page Flow Logging](#)

[Viewing Page Flow Logging Reports](#)

[Setting Page Flow Buffer Size and Flush Interval](#)

[Using the System Subtab](#)

5.15 Setting Page Flow Buffer Size and Flush Interval

Use this procedure to set the buffer size and flush interval for page flow logging. Page flow data is buffered within each JVM and periodically asynchronously

flushed to the database. The flush is triggered by two parameters: a time interval and the maximum number of page log accesses in the buffer. The data is flushed to the database when the specified flush interval is reached, or when the number of page log accesses exceeds the configured buffer size.

Steps

1. In the **Settings** tab, navigate to **System > Advanced**.
2. In the **View** field, select **JTF**.
3. In the **Key** column, find the property **JTF_PF_BUFFER_SIZE**.
4. To change the value from the default (5 page hits), click **JTF_PF_BUFFER_SIZE** and modify the value as desired. Click **Update** to save.
5. In the **Key** column, find the property **JTF_PF_FLUSH_INTERVAL**.
6. To change the value from the default (30 seconds), click **JTF_PF_FLUSH_INTERVAL** and modify the value as desired. Click **Update** to save.

Note: Your application JSPs must use the standard JTF JSP header and footer includes for the page hits to be logged. If your application does not use the JTF include JSPs, then you can still use this feature. However, your JSPs will need to call the appropriate JTF APIs at the start and end of the HTTP request-response.

Related Procedures

[Setting Up Page Flow Logging](#)

[Viewing Page Flow Logging Reports](#)

[Migrating Page Flow Data](#)

[Using the System Subtab](#)

Using the Deployment Tab

6.1 Viewing System Alerts

Use this procedure to use the Application Alert Board. The Application Alert Board allows you check the health of a deployed system by displaying a filterable test summary. It complements the Diagnostics framework to guide you when troubleshooting failures or misconfigurations.

Steps

1. In the **Deployment** tab, navigate to **System Statistics > System Alerts**. Alternatively, you can view only Security-related alerts in the **Settings** tab by navigating to **Security > Alerts Monitor**. The Alerts Monitor is a summary of security-related tests that are run on each registered host.
2. In the **Filters Selection** area, you can set what displays below in the **Monitor Board** area. You can filter by application, node, test status, and date range. The entire page refreshes automatically each time you make a selection from one of the drop-down lists. To set a date range, use the date picker widgets to select the appropriate dates and then click **Go**. If needed, click **Restore** to return the date fields to their original values.

Note: If you are in the Security subtab and are viewing the Alerts Monitor, then you can only filter by node.

3. The **Monitor Board** area displays tests and their results. The tests are organized by test group and application. Colored icons express whether the test has

succeeded, failed, or resulted in a warning. Refer to the **Nodes Alias** area below to find out which registered node is mapped to each numbered column (labeled 0, 1, 2, etc.) in the table.

Related Procedures

[Viewing Jserv Statistics](#)

6.2 Viewing Jserv Statistics

Use this procedure to view the Jserv statistics of a particular host.

Steps

1. In the **Deployment** tab, navigate to **System Statistics > Jserv Statistics**.
2. The contents of the drop-down list labeled **Node** are taken from the **Hosts** page (which displays under the **Configuration** subtab).
3. To switch to a remote node, choose a value from the drop-down list and click **Submit**.

If the node is not accessible, then an "Error: Node not reachable" message will display. If the node is accessible and JTT is installed on it, then a pop-up window will allow you to log in. When your login is successful, Jserv statistics for that node will display.

4. The data provided is as follows:
 - a. **Memory:** Displays the total amount of memory in the Java Virtual Machine and amount of free memory in the system.
 - b. **Threads:** Displays the total number of active threads in the current thread's thread group.
 - c. **Connection Pool:** Displays the status of the database connection pool, including the maximum connection pool size, the current connection pool size, and the number of connections being used.
 - d. **Session:** Displays information about the servlet session, including the number of stateful sessions, the number of concurrent user requests, the total number of ICX sessions, and the applications installed in this middle tier (specified by application short name).
 - e. **Services In Use:** Displays information about each application, including the service descriptor, the maximum number of services, the number of current services, and the number of services in use.

Related Procedures

[Viewing System Alerts](#)

6.3 Managing Configuration

You can perform the following tasks from the Configuration subtab:

- [Setting Up Hosts](#)
- [Editing Host Details](#)
- [Editing Resource Settings](#)

6.4 Setting Up Hosts

Use this procedure to manage hosts. The Hosts Setup page is the starting point for viewing, creating, updating, and removing hosts.

Steps

1. In the **Deployment** tab, navigate to **Configuration > Hosts**.
2. If you want to register a host, then click **Create**. This opens the page where you edit the details of a new host. You must register all mid-tier hosts.
3. If you want to modify the attributes of a host, then click a name in the **Host Name** column. This opens the page where you edit the details of an existing host.
4. If you want to remove a host, then:
 - a. Select a check box in the **Remove** column.
 - b. Click **Update** to save.

Related Procedures

[Editing Host Details](#)

[Managing Configuration](#)

6.5 Editing Host Details

Use this procedure to edit the details of new or existing hosts.

Steps

1. In the **Deployment** tab, navigate to **Configuration > Hosts**, then either click **Create** or click the name of a host in the table.
2. If you are creating a new host, then type the name of the mid-tier URL into the **Hostname** field. For example, "computername.companyname.com.". If you are updating an existing host, then you cannot edit this field.
3. Type a description into the **Description** field.
4. Edit port numbers:
 - a. Type the port number where the Apache in this mid-tier host runs into the first **Port** field. For example, "9999."
 - b. If there are multiple Apache instances running on the same mid-tier host, then type additional port numbers into the **Port** column. For example, "9999" and "8080."
 - c. If you want to remove an existing port, then select the appropriate check box in the **Remove** column.
5. Edit application deployment:

This information is used by the caching framework to cache and prime only the data for the configured set of applications.

 - a. Choose the name of an application in one list and click > or < to move it to the other list.
 - b. Repeat step a as desired.
 - c. If you want to move all **Available Applications** to the **Deployed Applications** list, then click >>.
 - d. If you want to move all **Deployed Applications** to the **Available Applications** list, then click <<.
6. If you are creating a new host, then click **Create** to save.
7. If you are updating an existing host, then click **Update** to save.

Related Procedures

[Setting Up Hosts](#)

[Managing Configuration](#)

6.6 Editing Resource Settings

Use this procedure to manage resource settings for the cache. The cache is a data structure that holds frequently used Java objects. It is composed of component caches. Component caches hold the objects of application modules that pertain to specific application functionality. In the **Resource Settings** subtab, you can set the maximum size of the cache (in megabytes). This is used to prevent the JVM memory from bloating because of caching. When the JVM's memory usage reaches this limit, the cache stops growing in size. Elsewhere, in the **Cache** subtab, you can manage cache policies, manage component caches, and view cache statistics.

Steps

1. In the **Deployment** tab, navigate to **Configuration > Resource Settings**.
2. To define cache resource settings, type a number into the **Disable Cache if Total Memory Exceeds** field. Typically this represents a percentage of the maximum memory of the JVM (in megabytes).
3. Click **Update** to save.

Related Procedures

[Using Cache](#)

Using Diagnostics

7.1 Using Diagnostics

Note: You can also navigate to the Diagnostics screens by typing the following URL into a Web browser:

`http://hostname:portnumber/OA_HTML/jtfqalgn.htm`

This is particularly useful if the deployment is having startup problems.

You can perform the following tasks from the Diagnostics screens:

- [Using the Diagnostics Summary](#)
- [Using the LogViewer](#)
- [Running Test Groups](#)
- [Running Tests](#)
- [Managing Test Groups](#)
- [Creating Test Groups](#)
- [Updating Test Groups](#)
- [Managing Tests](#)
- [Registering Tests](#)
- [Setting Default Test Input Values](#)
- [Managing Applications](#)
- [Setting Up Security for Diagnostics](#)

For information on Diagnostics concepts, see [Understanding Diagnostics](#).

7.2 Using the Diagnostics Summary

Use the following procedure to use the Diagnostics Summary page, which displays data regarding registered diagnostic tests and recent test failures. For an introduction to Diagnostics concepts, please see [Understanding Diagnostics](#).

Steps

1. In the Diagnostics UI, navigate to the **Home** tab, then choose the **Summary** subtab.
2. Depending on your user responsibilities, one or more of the following bins may display:
 - The **Test Summary** table displays how many tests have been registered for each application. To view or run tests for a particular application, click a link in the corresponding **Registered Tests** column. The application specified in the Application drop-down list will change accordingly, and you can then navigate through the tabs and pages to view or run tests for that application.
 - The **Failures in Past Week** table lists any tests which have failed during the past seven days. It provides the test name, the test group name, the application name, and the date and time when the failure occurred. Depending on your user responsibilities, you may be able to click a link in the **Date** column to open a log of the test failure.

Related Procedures

[Using the LogViewer](#)

[Using Diagnostics](#)

7.3 Using the LogViewer

The LogViewer is available to users with the Diagnostic Role "Diagnostic Super User." The Log Viewer displays log records which have been generated during diagnostic sessions. Use the following procedure to filter the data. For an introduction to Diagnostics concepts, please see [Understanding Diagnostics](#).

Steps

1. In the Diagnostics UI, navigate to the **Home** tab, then click the **LogViewer** subtab.
2. To activate your choice of filters:
 - a. You can filter by date with the **From** field. This sets the lower boundary of the filtering date range. To enter a value into the field, click the calendar button next to the field and choose a date from the pop-up which displays. Make sure that this value is earlier than the value in the **To** field.
 - b. You can filter by date with the **To** field. This sets the upper boundary of the filtering date range. To enter a value into the field, click the calendar button next to the field and choose a date from the pop-up which displays. Make sure that this value is later than the value in the **From** field.
 - c. To filter by application, select an application name from the **Application** drop-down list. Alternatively, select **All Applications** to include all applications in the query.
 - d. To filter by group, choose a value from the **Group Name** drop-down list. This field is populated based on the value in the **Application** drop-down list.
 - e. To filter by test status, choose **All**, **Failures**, **Warnings**, or **Successes** from the **Status** field.
 - f. Optionally, select the **Current Session Test Runs Only** check box to only search for log records from the current session.
3. Click **Search Log Records** to perform the search.
4. If records are found, a table labeled **Summary of Logs** displays the search results.
5. To see a detailed view of one or more logs, select the corresponding checkbox(es) in the **Select** column, then click **Details**. Alternatively, click a link in the table to display the detailed log for **Total Runs**, **Successes**, **Warnings**, or **Failures**. The page refreshes to display detailed log information.
6. To delete one or more test logs, select the select the corresponding checkbox(es) in the **Select** column, then click **Delete**.
7. To send one or more test logs by e-mail, select the select the corresponding checkbox(es) in the **Select** column, then click **Email**. On the next screen, you can specify the recipient name, subject line, customer name, and problem severity before sending the e-mail.

8. To create a report that is formatted in an easy-to-read way, select the corresponding checkbox(es) in the **Select** column, then click **Print**. The next screen displays a printable report which you can send to a printer.

Related Procedures

[Using the Diagnostics Summary](#)

[Using Diagnostics](#)

7.4 Running Test Groups

You can perform the following tasks from the **Basic** tab:

[Running All Test Groups](#)

[Running One Test Group](#)

For information on Diagnostics framework concepts, see [Understanding Diagnostics](#).

Note: Test result information is from tests that have been executed in the current session. Results do not persist from one session to the next.

7.5 Running All Test Groups

Use this procedure to run all test groups on an application. Test groups are logical sets of one or more related tests. For an introduction to Diagnostics concepts, please see [Understanding Diagnostics](#).

Steps

1. In the Diagnostics UI, navigate to the **Basic** tab.
2. Choose an application from the **Application** drop-down list.
3. Click **Run All Groups**.
4. View the test results.
5. If you want to view a detailed summary of a test, then click the icon in the **Report** column.

Related Procedures[Running All Test Groups](#)[Managing Test Groups](#)[Using Diagnostics](#)

7.6 Running One Test Group

Use this procedure to run a specific test group on an application. Test groups are logical sets of one or more related tests. For an introduction to Diagnostics concepts, please see [Understanding Diagnostics](#).

Steps

1. In the Diagnostics UI, navigate to the **Basic** tab.
2. Choose an application from the **Application** drop-down list.
3. Click the name of the test group.
4. If you want to run the test group's prerequisite group or groups, then click **Run With Prerequisite**. You can view the names of the prerequisite group or groups in the **Prerequisites** drop-down list.
5. If you want to run the test group alone, then click **Run Without Prerequisite**.
6. View the test results.
7. If you want to view a detailed summary of a test, then click the icon in the **Report** column.

Related Procedures[Running One Test Group](#)[Managing Test Groups](#)[Using Diagnostics](#)

7.7 Running Tests

Use this procedure to run a test on an application. Tests verify the correct behavior of a particular feature or function. For an introduction to Diagnostics concepts, please see [Understanding Diagnostics](#).

Steps

1. In the Diagnostics UI, navigate to the **Advanced** tab.
2. Choose an application from the **Application** drop-down list.
3. Click the name of the test.
4. If you want to specify your own input values, then type them into the appropriate fields. Otherwise, the test runs using default values.
5. Click **Run Test**.
6. View the test results.
7. If you want to view a detailed summary of a test, then click either the icon in the **Report** column or **View Report**.

7.8 Managing Test Groups

Use this procedure to manage test groups. The main page for test groups is the starting point for viewing, creating, updating, prioritizing, and removing test groups. Please note that this procedure is not applicable to the application "HTML Platform." For an introduction to Diagnostics concepts, please see [Understanding Diagnostics](#).

Steps

1. In the Diagnostics UI, navigate to the **Configuration** tab, choose an application from the drop-down list, then choose **Groups**.
2. If you want to create a new test group, then click **Create**.
This opens the page where you edit the details of a new test group.
3. If you want to update an existing test group, then click a link in the **Group Name** column. This opens the page where you edit the details of an existing test group.
4. If you want to change the test group sequence, then choose the appropriate numbers from the drop-down lists in the **Sequence** column.
5. If you want to remove a test group, then select the appropriate check box in the **Remove** column.
6. Optionally, click **Restore** to reset the fields to their original settings.
7. Click **Update** to save.

Related Procedures

[Creating Test Groups](#)

[Updating Test Groups](#)

[Using Diagnostics](#)

7.9 Creating Test Groups

Use this procedure to create test groups. Test groups are logical sets of one or more related tests. Please note that this procedure is not applicable to the application "HTML Platform." For an introduction to Diagnostics concepts, please see [Understanding Diagnostics](#).

Steps

1. In the Diagnostics UI, navigate to the **Configuration** tab, choose an application from the drop-down list, choose **Groups**, then click **Create**.
2. Type the name of the test group into the **Group Name** field.
3. If you want to set Group Prerequisites, then choose from the drop-down lists in the **Group Name** column.
4. Optionally, click **More Prerequisites** to add more rows to the table.
5. Optionally, click **Restore** to reset the fields to their original settings.
6. Click **Create** to save.

Related Procedures

[Updating Test Groups](#)

[Managing Test Groups](#)

[Using Diagnostics](#)

7.10 Updating Test Groups

Use this procedure to view or edit the name and prerequisites of an existing test group. Test groups are logical sets of one or more related tests. Please note that this procedure is not applicable to the application "HTML Platform." For an introduction to Diagnostics concepts, please see [Understanding Diagnostics](#).

Steps

1. In the Diagnostics UI, navigate to the **Configuration** tab, choose an application from the drop-down list, choose **Groups**, then click the name of a group in the table.
2. If you want to rename the group, then type into the **Group Name** field.
3. If you want to remove a prerequisite, then select the appropriate check box in the **Remove** column.
4. If you want to add a prerequisite, then choose from the drop-down lists in the **Group Name** column.
5. If you want to view the individual tests that belong to that test group, then click **View Tests**. This opens the page where you manage how tests are organized into test groups.
6. Optionally, click **Restore** to reset the fields to their original settings.
7. Click **Update** to save.

Related Procedures

[Creating Test Groups](#)

[Managing Test Groups](#)

[Using Diagnostics](#)

7.11 Managing Tests

Use this procedure to manage tests. The Tests Administration page is the starting point for viewing, creating, updating, prioritizing, and removing individual tests. Please note that this procedure is not applicable to the application "HTML Platform." For an introduction to Diagnostics concepts, please see [Understanding Diagnostics](#).

Steps

1. In the Diagnostics UI, navigate to the **Configuration** tab, choose an application from the drop-down list, then choose **Tests**.
2. Choose a group from the **Group** drop-down list.
3. View test names and class names display in the table.

4. If you want to create a test, then click **Create**. This opens the page where you specify the details of a new test.
5. If you want to change the test sequence, then choose the appropriate numbers from the drop-down lists in the **Sequence** column.
6. If you want to remove a test, then select the check box in the **Remove** column.
7. Optionally, click **Restore** to reset the fields to their original settings.
8. Click **Update** to save.

Related Procedures

[Registering Tests](#)

[Setting Default Test Input Values](#)

[Using Diagnostics](#)

7.12 Registering Tests

Use this procedure to register a test. For an introduction to Diagnostics concepts, please see [Understanding Diagnostics](#).

Steps

1. In the Diagnostics UI, navigate to the **Configuration** tab, choose an application from the drop-down list, choose **Tests**, then click **Create**.
2. Type the fully qualified name of the Java class into the **Test Class Name** field.
3. View the class names of any existing tests in the **Existing Tests** field.
4. Choose a sequence number from the **Sequence** drop-down list.
5. Optionally, click **Restore** to reset the fields to their original settings.
6. Click **Create** to save.

Related Procedures

[Setting Default Test Input Values](#)

[Managing Tests](#)

[Using Diagnostics](#)

7.13 Setting Default Test Input Values

Use this procedure to set the default input values for a test. Please note that this procedure is not applicable to the application "HTML Platform." For an introduction to Diagnostics concepts, please see [Understanding Diagnostics](#).

Steps

1. In the Diagnostics UI, navigate to the **Configuration** tab, choose an application from the drop-down list, then choose **Inputs**.
2. Click the name of a test.
3. Type default input values into the appropriate fields.
4. Click **Update** to save.
5. Optionally, type an additional set of default values and click **Update** to save.
6. Repeat step 4 as desired.
7. If you want to delete an input value, then select the check box in the **Remove** column and click **Update** to save.

Related Procedures

[Registering Tests](#)

[Managing Tests](#)

[Using Diagnostics](#)

7.14 Managing Applications

Applications must be registered to be included in Oracle Diagnostics. Applications can have other applications as prerequisites.

You can perform the following tasks to manage applications:

[Registering Applications](#)

[Editing Application Prerequisites](#)

For an introduction to Diagnostics concepts, please see [Understanding Diagnostics](#).

7.15 Registering Applications

Use this procedure to register an application in Oracle Diagnostics. For an introduction to Diagnostics concepts, please see [Understanding Diagnostics](#).

Steps

1. In the Diagnostics UI, navigate to **Configuration > Applications**, then click **Create**.
2. Choose an application from the **Choose an Application** drop-down list.
3. If you want to set Application Prerequisites, then choose from the drop-down lists in the **Application Name** column.
4. Click **Register** to register the application.
5. View the new application display in the **Application** drop-down list at the top of the page.

Related Procedures

[Editing Application Prerequisites](#)

[Using Diagnostics](#)

7.16 Editing Application Prerequisites

Use this procedure to edit application prerequisites. For an introduction to Diagnostics concepts, please see [Understanding Diagnostics](#).

Steps

1. In the Diagnostics UI, navigate to **Configuration > Applications**.
2. Choose an application from the **Application** drop-down list.
3. If you want to remove an Application Prerequisite, then select the appropriate check box in the **Remove** column.
4. If you want to add an Application Prerequisite, then choose from the drop-down lists in the **Application Prerequisites** table.
5. Click **Update** to save.

Related Procedures

[Registering Applications](#)

Using Diagnostics

7.17 Purging Result Logs

Periodically, you should purge result entries from the database table, otherwise the table will grow without bound as each test that is executed results in a new row in the table. The results table is JTF_DIAGNOSTICS_LOG.

The statistics table does not grow very large since its size is based on the number of tests registered, not the number of times these tests have been executed. However, since the statistics information keeps a running record of different metrics (for example, the number of failures), then you should refresh this information to keep the statistics relevant to the state of the system. The statistics table is JTF_DIAGNOSTIC_STATS.

Test result and statistic entries can be removed from the database by navigating to **Configuration > Applications**, then choosing the desired application from the drop-down list provided. The bottom of the page shows all the result and statistic entries for the application for all sessions. Deleting the result entries removes all log entries that have been created for this application, regardless of session. Note that this includes the current diagnostic session.

This page only shows the result entries in the database, and only deletes the log entries in the database. If any result files have been generated by diagnostic sessions (if the database was down), then they have to be manually deleted by going the directory specified by the `-Dframework.Logging.system.filename` parameter.

7.18 Setting Up Security for Diagnostics

Certain diagnostic tests may contain sensitive information, and therefore need to be secured from unauthorized access. Use this procedure to assign user responsibilities to different Diagnostic Roles. Diagnostic Roles determine the set of operations that can be performed on test groups, based on the sensitivity of the test group (low, medium, or high). The Diagnostic Roles available are as follows:

- **Super User:** For all test groups of all registered applications, a Super User can execute tests, perform configuration, view reports, and set up security.
- **Application Super User:** For all test groups of a given application, an Application Super User can execute tests, perform configuration, view reports, and set up security. For test groups of medium or low sensitivity belonging to other applications, an Application Super User can execute tests, configure test inputs, and view reports.

- **End User:** For test groups of low sensitivity belonging to any application, an End User can execute tests and configure test inputs.

For an introduction to Diagnostics concepts, please see [Understanding Diagnostics](#).

Steps

1. In the Diagnostics UI, navigate to **Configuration > Security**.
2. In the table, click the name of the Diagnostics Role that you wish to configure.
3. On the page which opens, make a selection from the **Applications** drop-down list, which automatically populates the list of **Available Responsibilities** below.
4. Use the arrow buttons to move responsibilities between the **Available Responsibilities** list and the **Selected Responsibilities** list.
5. Click **Save** to assign the responsibilities in the **Selected Responsibilities** list to the Diagnostics Role that you are working with.

Related Procedures

[Using Diagnostics](#)

Using the Cache Subtab

8.1 Using Cache

You can perform the following tasks from the Cache subtab:

- [Managing Cache Policies](#)
 - [Editing Cache Policy Details](#)
- [Managing Cache Filters](#)
 - [Viewing Cache Filter Details](#)
 - [Creating and Editing Cache Filters](#)
- [Managing Component Cache](#)
 - [Editing Component Cache Details](#)
- [Viewing Cache Statistics](#)

For an introduction to cache concepts, please see [Understanding Cache](#).

8.2 Managing Cache Policies

Use this procedure to manage cache policies. The main cache policies screen lists the cache policy of each application on each host. For an introduction to cache concepts, please see [Understanding Cache](#).

Steps

1. In the **Performance** tab, navigate to **Cache > Applications > Policies**.
2. Choose a host name or **All Hosts** from the drop-down list labeled **View** to select which cache policies display in the table.

3. To sort the table alphabetically by host name or application, click the appropriate link in the top row of the table.
4. To edit the details of a cache policy, click a link in the table. This opens the page where you edit the details of a cache policy.
5. To set a cache policy, choose **Cache Only**, **Cache and Priming**, **Disabled**, or **Custom** from the drop-down lists in the **Policy** column.

If you enable caching, then all components of the application use the caching. If you enable priming, then the components read some initial cache data when the Jserv process begins. Priming can improve the performance for the first set of users because the data that they need is already available in the cache.

However, priming can increase the size of the Java Virtual Machine. Disable the cache if the size of the Java Virtual Machine grows too large.

6. To set filters, then choose **Enabled**, **Disabled**, or **Custom** from the drop-down lists in the **Filters** column.
7. Click **Update** to save.

Related Procedures

[Editing Cache Policy Details](#)

[Using Cache](#)

8.3 Editing Cache Policy Details

Use this procedure to edit the details of cache policies and cache filters. The **Cache Policy Detail** page displays the cache policy types for components of applications running on a particular host. It also displays cache filters. For an introduction to cache concepts, please see [Understanding Cache](#).

Steps

1. In the **Performance** tab, navigate to **Cache > Applications > Policies**, then click the name of a policy in the table.
2. To modify a cache policy, choose **Cache Only**, **Cache and Priming**, or **Disabled** from the drop-down list in the **Policy** column of the table.
3. Click **Update** to save.
4. To enable or disable a cache filter, go to the **Enabled** column and select or deselect the check box as desired.

5. Click **Update** to save.

Related Procedures

[Managing Cache Policies](#)

[Using Cache](#)

8.4 Managing Cache Filters

Use this procedure to manage cache filters. The main page for cache filters is the starting point for viewing, creating, updating and removing cache filters. Cache filters are application-specific components that indicate the responsibility IDs and language codes for priming. For an introduction to cache concepts, please see [Understanding Cache](#).

Steps

1. In the **Performance** tab, navigate to **Cache > Applications > Filters**.
2. Choose an application name from the drop-down list labeled **View** to choose which cache filters display in the table.
3. If you want to create a new cache filter, then click **Create**. This opens the page where you begin editing the details of a new cache filter.
4. If you want to view the details of a cache filter, then click a filter name in the table. This opens the page where you view the details of a Cache Filter.
5. If you want to remove a filter, then:
 - a. Select the appropriate check box in the **Remove** column.
 - b. Click **Update**.

This removes the filter from the table.

Related Procedures

[Viewing Cache Filter Details](#)

[Creating and Editing Cache Filters](#)

[Using Cache](#)

8.5 Viewing Cache Filter Details

Use this procedure to view the details of a cache filter. For an introduction to cache concepts, please see [Understanding Cache](#).

Steps

1. In the **Performance** tab, navigate to **Cache >Applications > Filters**, then click a filter name in the table.
2. The page displays information about the cache filter's responsibilities and languages.
3. If you want to edit the details of the cache filter, then click **Edit**. This opens the page where you edit the details of an existing cache filter.

Related Procedures

[Creating and Editing Cache Filters](#)

[Managing Cache Filters](#)

[Using Cache](#)

8.6 Creating and Editing Cache Filters

When you create a new cache filter or modify an existing cache filter, you complete three different screens. The following procedures guide you through each screen:

[Step 1: Editing Basic Information](#)

[Step 2: Choosing Responsibilities](#)

[Step 3: Choosing Languages](#)

After you finish creating or editing a cache filter, you are automatically returned to the main cache filters page.

For an introduction to cache concepts, please see [Understanding Cache](#).

8.7 Step 1: Editing Basic Information

Use this procedure to enter basic information about a cache filter. For an introduction to cache concepts, please see [Understanding Cache](#).

Steps

1. In the **Performance** tab, navigate to **Cache >Applications > Filters**. If you are creating a new filter, then click **Create**. If you are modifying an existing filter, then click a policy name in the table and click **Edit** after the new page displays.
2. Type a filter name into the **Filter Name** field.
3. Type a description into the **Description** field.
4. Choose an application from the **Application** drop-down list.
5. Click **Continue** to save and move on to the next screen.

Related Procedures

[Step 2: Choosing Responsibilities](#)

[Step 3: Choosing Languages](#)

[Creating and Editing Cache Filters](#)

[Managing Cache Filters](#)

[Using Cache](#)

8.8 Step 2: Choosing Responsibilities

Use this procedure to choose which responsibilities apply to a particular cache filter. For an introduction to cache concepts, please see [Understanding Cache](#).

Steps

1. Select the name of a responsibility in one list and click > or < to move it to the other list.
2. Repeat step 1 as desired.
3. If you want to move all **Available Responsibilities** to the **Configured Responsibilities** list, then click >>.
4. If you want to move all **Configured Responsibilities** to the **Available Responsibilities** list, then click <<.
5. Click **Continue** to save and move on to the next page.

Related Procedures

[Step 3: Choosing Languages](#)

[Creating and Editing Cache Filters](#)

[Managing Cache Filters](#)

[Using Cache](#)

8.9 Step 3: Choosing Languages

Use this procedure to choose which languages apply to a particular cache filter. For an introduction to cache concepts, please see [Understanding Cache](#).

Steps

1. Select a language in one list and click > or < to move it to the other list.
2. Repeat step 1 as desired.
3. If you want to move all **Available Languages** to the **Configured Languages** list, then click >>.
4. If you want to move all **Configured Languages** to the **Available Languages** list, then click <<.
5. If you are creating a new Cache Filter, then click **Create** to save.
6. If you are updating an existing Cache Filter, then click **Update** to save.

Related Procedures

[Creating and Editing Cache Filters](#)

[Managing Cache Filters](#)

[Using Cache](#)

8.10 Managing Component Caches

Use this procedure to manage component caches. The main page for component caches is the starting point for viewing, creating, updating, and removing component caches. Each application uses one or more component caches. For an introduction to cache concepts, please see [Understanding Cache](#).

Note: Before modifying a component cache, please ensure that the corresponding code has already been modified.

Steps

1. In the **Performance** tab, navigate to **Cache > Components**.
2. Choose an application from the drop-down list labeled **View** to choose which component caches display.
3. If you want to create a component cache, then click **Create**. This opens the page where you edit the details of a new component cache.
4. If you want to update a component cache, then click its name. This opens the page where you edit the details of an existing component cache.
5. If you want to remove a component cache, then select the check box in the **Remove** column.
6. Click **Update** to save.

Related Procedures[Editing Component Cache Details](#)[Using Cache](#)

8.11 Editing Component Cache Details

Use this procedure to edit the details of new or existing component caches. For an introduction to cache concepts, please see [Understanding Cache](#).

Note: Before modifying a component cache, please ensure that the corresponding code has already been modified.

Steps

1. In the **Performance** tab, navigate to **Cache > Components**, then either click **Create** or click the name of a component cache in the table.
2. If you are creating a new component cache, then choose an application from the **Application** drop-down list. If you are updating an existing component cache, then you cannot edit this field.
3. If you are creating a new component cache, then type a component identifier into the **Component Identifier** field. The component identifier should start with the appropriate application shortcode. If you are updating an existing component cache, then you cannot edit this field.

4. Type a component name into the **Component Name** field.

5. Type a description into the **Description** field.

6. Type into a loader class name into the **Loader Class Name** field.

Each component cache has an associated loader class that is used by the caching framework to load the corresponding object into the cache, if it is not already in the cache.

7. Choose **Time to Live** or **Idle Time** from the drop-down list.

The Time to Live is the maximum length of time for a cache to be considered valid. The Idle Time is the maximum length of time for an object to go unused before it is flushed from the cache.

a. Type a number of seconds, minutes, or hours into the text input field to edit the Time to Live or Idle Time.

b. Choose **seconds**, **minutes**, or **hours** from the drop-down list.

8. If you are creating a new component cache, then select or deselect the check box labeled **Enable Security Group ID**. The Security Group ID is used in the hosting environments. If you are updating an existing component cache, then you cannot edit this field.

9. Select or deselect the check box labeled **Enable Statistics Collection**. Enabling statistics collection can slow the cache down. Use it if there are problems with using the cache or if you need to check the cache efficiency.

10. Select or deselect the check box labeled **Distributed Mode**. Distributed Mode means that object updates are propagated across computers and across Java VMs.

11. Select or deselect the check box labeled **HTML Platform Component**. HTML Platform Components are generic caches that are common to all applications. Usually, you only select this check box for JTF component caches. It is merely a logical grouping that does not change the assigned application.

12. If you are creating a new component cache, then click **Create** to save.

13. If you are updating an existing component cache, then click **Update** to save.

Related Procedures

[Managing Component Caches](#)

[Using Cache](#)

8.12 Viewing Cache Statistics

Use this procedure to view statistics about caches. For an introduction to cache concepts, please see [Understanding Cache](#).

Steps

1. In the **Performance** tab, navigate to **Cache > Statistics**.
2. Choose from the drop-down lists next labeled **View** to select which hosts and applications have data about them displayed below.
3. You can use these statistics to configure the component caches based on how each component cache is performing. You can interpret the data to decide how effective the component caches are and whether or not they should be disabled. For example, if the cache has a high hit ratio, then the cache is useful and should not be disabled.

Related Procedures

[Using Cache](#)

Using the Declarative Page Flows Subtab

9.1 Using Declarative Page Flows

The Introduction page for Declarative Flows is the starting point for setting up and using Declarative Page Flows. The Declarative Page Flows framework enables you to customize, upgrade, and troubleshoot the content and flow of JSPs, without having to modify code. The key concept of the framework involves the abstraction of JSPs into named logical entities, called Logical Pages. The components of the Declarative Page Flows framework are Physical Pages, Logical Pages, Rules, and Business Flows.

You can perform the following tasks from the Declarative Page Flows subtab:

- [Managing Physical Pages](#)
 - [Editing Physical Page Details](#)
- [Managing Logical Pages](#)
 - [Editing Logical Page Details](#)
- [Managing Rules](#)
 - [Editing Rule Details](#)
- [Managing Business Flows](#)
 - [Editing Business Flow Details](#)
 - [Creating Flow Branches](#)
 - [Duplicating Flows](#)
 - [Viewing Flow Versions](#)

For an introduction to Declarative Page Flows concepts, please see [Understanding Declarative Page Flows](#).

9.2 Managing Physical Pages

The main page for Physical Pages is the starting point for viewing, registering, and updating Physical Pages. Physical Pages are JavaServer Pages (JSPs). Use this procedure to manage Physical Pages. For an introduction to Declarative Page Flows concepts, please see [Understanding Declarative Page Flows](#).

Steps

1. In the **Design** tab, navigate to **Declarative Page Flows > Physical Pages**.
2. If you want to change which Physical Pages display in the table, then:
 - a. To make Physical Pages from all applications to display in the table, then choose **All** from the drop-down list at the top of the table.
 - b. If you want to filter the table by application, then choose a module prefix from the drop-down list labeled **View** at the top of the table.
 - c. If you want to search the table of Physical Pages, then type the name of a Physical Page or part of the name of a Physical Page into the text input field.

Optionally, use the percent sign (%) as a wild card in your search phrase. For example, the search phrase "sales%" returns the Physical Pages whose names begin with "sales." Alternatively, the search phrase "%sales" returns the Physical Pages whose names end with "sales." The search phrase "sales" returns the Physical Page named "sales."
 - d. Click **Go**. The results display in the table.
3. If you want to register a Physical Page, then click **Create**. This opens the page where you edit the details of a new Physical Page.
4. If you want to update an existing Physical Page, then click its name in the table. This opens the page where you edit the details of an existing Physical Page.

Related Procedures

[Editing Physical Page Details](#)

[Using Declarative Page Flows](#)

9.3 Editing Physical Page Details

On the details page for Physical Pages, you complete the procedures of either registering or updating Physical Pages. Use this procedure to edit the details of new

or existing Physical Pages. For an introduction to Declarative Page Flows concepts, please see [Understanding Declarative Page Flows](#).

Steps

1. In the **Design** tab, navigate to **Declarative Page Flows > Physical Pages**, then either click **Create** to register a new page or click the name of a JSP to modify its details.
2. Type into the **Name** field to edit the name of the Physical Page.
3. Type into the **Description** field to edit the description of the Physical Page. This field is optional.
4. If you are registering a new Physical Page, then choose an application from the **Application** drop-down list. If you are updating an existing Physical Page, then you cannot edit this field. It is permanently set when you create the Physical Page.
5. If you are registering a new Physical Page, then click **Create** to save.
6. If you are updating an existing Physical Page, then click **Update** to save.

Related Procedures

[Managing Physical Pages](#)

[Using Declarative Page Flows](#)

9.4 Managing Logical Pages

The main page for Logical Pages is the starting point for viewing, creating, and updating Logical Pages. Logical Pages can be utilized either stand-alone or to represent nodes in a Business Flow. One or more Physical Pages map to each Logical Page. Use this procedure to manage Logical Pages. For an introduction to Declarative Page Flows concepts, please see [Understanding Declarative Page Flows](#).

Steps

1. In the **Design** tab, navigate to **Declarative Page Flows > Logical Pages**.
2. If you want to change which Logical Pages display in the table, then:
 - a. If you want to allow Physical Pages from all applications to display in the table, then choose **All** from the drop-down list labeled **View** at the top of the table.

- b. If you want to filter the table by application, then choose a module prefix from the drop-down list labeled **View** at the top of the table.
- c. If you want to search the table of Physical Pages, then type the name of a Physical Page or part of the name of a Physical Page into the text input field.

Optionally, use the percent sign (%) as a wild card in your search phrase. For example, the search phrase "sales%" returns the Physical Pages whose names begin with "sales." Alternatively, the search phrase "%sales" returns the Physical Pages whose names end with "sales." The search phrase "sales" returns the Physical Page named "sales."

- d. Click **Go**. The results display in the table.
3. If you want to create a Logical Page, then click **Create**. This opens the page where you edit the details of a new Logical Page.
 4. If you want to update an existing Logical Page, then click its name in the table. This opens the page where you edit the details of an existing Logical Page.

Related Procedures

[Editing Logical Page Details](#)

[Using Declarative Page Flows](#)

9.5 Editing Logical Page Details

On the details page for Logical Pages, you complete the procedures of either creating or updating Logical Pages. Use this procedure to edit the details of new or existing Logical Pages. For an introduction to Declarative Page Flows concepts, please see [Understanding Declarative Page Flows](#).

Steps

1. In the **Design** tab, navigate to **Declarative Page Flows > Logical Pages**, then either click **Create** or click a page name in the table.
2. Type into the **Name** field to edit the name of the Logical Page.
3. Type into the **Description** field to edit the description of the Logical Page. This field is optional.
4. If you are creating a new Logical Page, then choose an application from the **Application** drop-down list. If you are updating an existing Logical Page, then you cannot edit this field. It is permanently set when you create the Rule.

5. Edit the **Page Controller** field if you do not want to use the default Java class which is prefilled in the field. The class designated here implements the Logical Page Controller interface and provides values to evaluate Rules.
6. Type into the **Default Physical Page** field to edit the name of the Physical Page that displays when none of the Rules evaluate to true. Optionally, click **Go** to choose from a list of values.
7. Edit the **Page Display Rules** table; one row in the table represents one Rule:
 - a. Type into the **Sequence** column to edit the order in which the Rules are evaluated.
 - b. Type into the **Rule Name** column to edit the name of the Rule. Optionally, click **Go** to choose from a list of values.
 - c. Type into the **Description** column to edit the description of the Rule.
 - d. Type into the **Physical** column to edit the name of the Physical Page that is associated with the Rule. Optionally, click **Go** to choose from a list of values.
8. Repeat step 7 as desired.
9. Optionally, click **Add Rows** to add empty rows to the table.
10. If you are creating a new Logical Page, then click **Create** to save.
11. If you are updating an existing Logical Page, then click **Update** to save.

Related Procedures

[Managing Logical Pages](#)

[Using Declarative Page Flows](#)

9.6 Managing Rules

The main page for Rules is the starting point for viewing, creating, and updating Rules. In the context of a Logical Page, Rules determine either what Physical Page needs to be rendered or what Logical Page displays next. Use this procedure to manage Rules. For an introduction to Declarative Page Flows concepts, please see [Understanding Declarative Page Flows](#).

Steps

1. In the **Design** tab, navigate to **Declarative Page Flows > Rules**.

2. If you want to change which Rules display in the table, then:
 - a. If you want Rules from all applications to display in the table, then choose **All** from the drop-down list labeled **View** at the top of the table.
 - b. If you want to filter the table by application, then choose a module prefix from the drop-down list labeled **View** at the top of the table.
 - c. If you want to search the table of Rules, then type the name of a Rule or part of the name of a Rule into the text input field.

Optionally, use the percent sign (%) as a wild card in your search phrase. For example, the search phrase "sales%" returns the Rules whose names begin with "sales." Alternatively, the search phrase "%sales" returns the Rules whose names end with "sales." The search phrase "sales" returns the Rule named "sales."
 - d. Click **Go**. The results display in the table.
3. If you want to create a Physical Page, then click **Create**. This opens the page where you edit the details of a new Rule.
4. If you want to update an existing Rule, then click its name in the table. This opens the page where you edit the details of an existing Rule.

Related Procedures

[Editing Rule Details](#)

[Using Declarative Page Flows](#)

9.7 Editing Rule Details

On the details page for Rules, you complete the procedures of either creating or updating Rules. Use this procedure to edit the details of new or existing Rules. For an introduction to Declarative Page Flows concepts, please see [Understanding Declarative Page Flows](#).

Steps

1. In the **Design** tab, navigate to **Declarative Page Flows > Rules**, then either click **Create** or click a Rule name in the table.
2. Type into the **Name** field to edit the name of the Rule. If you are working with an existing Rule, then you cannot edit this field.

3. Type into the **Description** field to edit the description of the Rule. This field is optional.
4. If you are creating a new Rule, then choose an application from the **Application** drop-down list. If you are updating an existing Rule, then you cannot edit this field. It is permanently set when you create the Rule.
5. Edit the Rule Conditions table; one row in the table represents one Rule Condition:
 - a. Type a parameter into the **Parameter** column.
 - b. Choose an operator from the drop-down list in the **Condition** column.
 - c. Type a value into the **Value** column.
6. Repeat step 5 as desired.
7. Optionally, click **Add Rows** to add empty rows to the table.
8. If you are creating a new Rule, then click **Create** to save.
9. If you are updating an existing Rule, then click **Update** to save.

Related Procedures

[Managing Rules](#)

[Using Declarative Page Flows](#)

9.8 Managing Business Flows

The main page for Business Flows is the starting point for viewing, creating, updating, previewing, and cloning Business Flows. Business Flows are page display sequences that address specific business processes. For example, you can create a Business Flow for the process of purchasing an item from an online store, or you can create a Business Flow for the process of resolving a user's service request. Business Flows can be either linear or branched in structure. Use this procedure to manage Business Flows. For an introduction to Declarative Page Flows concepts, please see [Understanding Declarative Page Flows](#).

Steps

1. In the **Design** tab, navigate to **Declarative Page Flows > Business Flows**.
2. If you want to change which Business Flows display in the table, then:

- a. If you want Business Flows from all applications to display in the table, then choose **All** from the drop-down list labeled **View** at the top of the table.
- b. If you want to filter the table by application, then choose a module prefix from the drop-down list labeled **View** at the top of the table.
- c. If you want to search the table of Business Flows, then type the name of a Business Flow or part of the name of a Business Flow into the text input field.

Optionally, use the percent sign (%) as a wild card in your search phrase. For example, the search phrase "sales%" returns the Business Flows whose names begin with "sales." Alternatively, the search phrase "%sales" returns the Business Flows whose names end with "sales." The search phrase "sales" returns the Business Flow named "sales."

- d. Click **Go**. The results display in the table.
3. To update an existing Business Flow, click its name in the table.
4. To create a branch in this Business Flow, click the icon in the **Create Flow Branch** column.
5. To preview an existing Business Flow, click the icon in the **Preview** column.
6. To view the different versions of a flow, then click the icon in the **View Versions** column.
7. If you want to create a Business Flow, then click **Create Flow**.
8. If you want to create a duplicate of a flow, then click **Duplicate Flow**.

Related Procedures

[Editing Business Flow Details](#)

[Creating Flow Branches](#)

[Duplicating Flows](#)

[Viewing Flow Versions](#)

[Using Declarative Page Flows](#)

9.9 Editing Business Flow Details

On the details page for Business Flows, you can edit the basic settings of new or existing Business Flows. After using this page, you can open the Map Flows page to define the conditional branches in the Business Flow. Use one of the following procedures:

[Creating a New Business Flow](#)

[Updating an Existing Business Flow](#)

For an introduction to Declarative Page Flows concepts, please see [Understanding Declarative Page Flows](#).

9.10 Creating a New Business Flow

Use this procedure to edit the basic settings of a new business flow. For an introduction to Declarative Page Flows concepts, please see [Understanding Declarative Page Flows](#).

Steps

1. In the **Design** tab, navigate to **Declarative Page Flows > Business Flows**, then click **Create**.
2. Type a flow name into the **Name** field.
3. Choose an application from the **Application** drop-down list.
4. Optionally, type a description into the **Description** field.
5. Optionally, select the **Secure** check box if the flow is to use HTTPS.
6. Edit the **Finalization Class** field if you want use a Java class other than the default Finalization Class (which is prefilled in the field). The class designated here implements the FlowFinalizer interface and executes at the end of the Business Flow.
7. Type the name of the Logical Page that should be invoked after the completion of the flow into the **Page to Display After Completing the Flow** field. Optionally, click **Go** to choose from a list of values.
8. Type the name of the first Logical Page in the flow into the **First Page of the Flow** field. Optionally, click **Go** to choose from a list of values.

9. Optionally, edit the **Default Flow Sequence** table; if the flow you are creating is linear, then complete this table. If the flow you are creating has conditional branches, then proceed to step 10.
 - a. Type numbers into the **Sequence** fields to indicate the page order within the flow.
 - b. Click **Go** to choose a Logical Page to set as the **Next Logical**. When you make your choice, the **Next Logical** and **Description** fields will automatically fill.
 - c. Repeat step b as desired. If needed, click **Add Rows** to add additional rows to the table.
10. Click **Create** to save.
11. Click **Create Flow Branch**. This opens the page where you define the conditional branches of a nonlinear flow.
12. Optionally, click **View Flow Versions** to view all the versions of this business flow.

Related Procedures

[Managing Business Flows](#)

[Using Declarative Page Flows](#)

9.11 Updating an Existing Business Flow

Use this procedure to edit the basic settings of an existing business flow. For an introduction to Declarative Page Flows concepts, please see [Understanding Declarative Page Flows](#).

Steps

1. In the **Design** tab, navigate to **Declarative Page Flows > Business Flows**, then click a flow name in the table.
2. Optionally, type a flow description into the **Description** field.
3. Optionally, select the **Secure** check box if the flow is to use HTTPS.
4. Type the name of the Finalization Class into the **Finalization Class** field. This is the name of a Java class. The class implements the FlowFinalizer interface and executes at the end of the Business Flow.

5. Type the name of the Logical Page that should be invoked after the completion of the flow into the **Page to Display after Completing the Flow** field. Optionally, click **Go** to choose from a list of values.
6. Type the name of the first Logical Page in the flow into the **First Page of the Flow** field. Optionally, click **Go** to choose from a list of values.
7. If the flow you are working with is linear (does not contain any conditional branches), then you can define the flow sequence in the Default Flow table.
8. Click **Update** to save.
9. If the flow you are working with is nonlinear (contains one or more conditional branches), then click **Create Flow Branch** to begin defining the branches of the flow.
10. To view the different versions of this flow, click **View Flow Versions**.

Related Procedures

[Managing Business Flows](#)

[Using Declarative Page Flows](#)

9.12 Creating Flow Branches

Business Flows are page display sequences that address specific business processes. The **Create Flow Branch** page allows you to define conditional branches within nonlinear business flows. Use this procedure to set the sequences of Logical Pages within Business Flows. For an introduction to Declarative Page Flows concepts, please see [Understanding Declarative Page Flows](#).

Steps

1. Choose a Logical Page from the **Current Logical** drop-down list. The Current Logical Page is the name of the Logical Page that you are setting up on this screen. After you save your work, you can repeat this entire procedure with another Logical Page within the Business Flow.
2. In the **Default Next Logical** field, type the name of the Logical Page that displays if there are no Rules in the table below, or if none of the Rules in the table below evaluate to "true." Optionally, click **Go** to choose from a list of values.
3. Edit the **Logical Node Rules** table.

- a. Type numbers into the **Sequence** fields to set the order in which the Rules are evaluated.
 - b. In the **Next Logical** fields, type the name of the Logical Page that you want to display after the Current Logical Page, only if the Rule in the next column evaluates to "true." Optionally, click **Go** to choose from a list of values.
 - c. In the **Rule Name** fields, type name of the Rule that controls whether or not the Logical Page in the previous column displays. Optionally, click **Go** to choose from a list of values.
4. Optionally, click **Add Rows** to add empty rows to the table.
 5. If you are creating a new Current Logical Page setup, then click **Create** to save. This opens another **Create Flow Branch** page where you can repeat this entire procedure with another Current Logical Page.
 6. If you are updating an existing Flow Branch setup, then click **Update** to save. This opens another **Create Flow Branch** page where you can repeat this entire procedure with another Current Logical Page.
 7. If you have no more Current Logical Pages to set up, then click **Finish**. This completes the procedures of either creating or updating Business Flows.

Related Procedures

[Managing Business Flows](#)

[Using Declarative Page Flows](#)

9.13 Duplicating Business Flows

Use this procedure to duplicate business flows. For an introduction to Declarative Page Flows concepts, please see [Understanding Declarative Page Flows](#).

Steps

1. In the **Design** tab, navigate to **Declarative Page Flows > Business Flows**, then click **Duplicate Flow**.
2. Click **Go** to choose the flow from a list of values. Edit the name of the flow if desired.
3. Click **Duplicate** to generate a duplicate of the flow. The **Flow Details** page automatically opens, where you can edit the details of the duplicate flow.

Related Procedures[Managing Business Flows](#)[Using Declarative Page Flows](#)

9.14 Viewing Flow Versions

Use this procedure to view all of the versions of a given business flow. For an introduction to Declarative Page Flows concepts, please see [Understanding Declarative Page Flows](#).

Steps

1. Choose which of the flows will be "active" by selecting the appropriate radio button in the table.
2. Click **Update** to save.
3. Optionally, click a flow name in the table.

This opens the page where you can edit the basic details of an existing flow.

Related Procedures[Managing Business Flows](#)[Using Declarative Page Flows](#)

Using the Declarative Components Subtab

10.1 Using Declarative Components

The Declarative Components framework enables you to quickly develop bins, graphs, reports, graph/report combinations, and LOVs that can be personalized by end users. Key features of the Declarative Components framework include the uniform look and feel of all UI components, compatibility with multiple data sources, and built in security.

You can perform the following tasks from the Declarative Components subtab:

- [Managing Components](#)
 - [Previewing Components](#)
 - [Registering Components](#)
 - * [Editing Component Metadata](#)
- [Defining Bin or Report Columns](#)
 - [Editing Bin or Report Column Details](#)
- [Managing LOV Columns](#)
 - [Editing LOV Column Details](#)
- [Defining Graph Metadata](#)
 - [Managing Graph Columns](#)
 - * [Editing Graph Column Details](#)
- [Managing Parameters](#)
 - [Editing Parameter Metadata](#)
- [Managing Component Security](#)

- Assigning a Responsibility to Components
 - * Selecting Components
- Assigning a Component to Responsibilities
 - * Selecting Responsibilities

For an introduction to Declarative Components concepts, please see the topic [Understanding Declarative Components](#).

10.2 Managing Components

The main page for Declarative Components is the starting point for viewing, creating, modifying, and previewing bins, graphs, reports, graph/report combinations, and LOVs. Use this procedure to manage Declarative Components. For an introduction to Declarative Components concepts, please see the topic [Understanding Declarative Components](#).

Steps

1. In the **Design** tab, navigate to **Declarative Components > Components**.
2. If you want to change the contents of the table, then:
 - a. To filter the table by application, choose an application from the **Application** drop-down list at the top of the page.
 - b. To filter the table by component type, then choose **All** or a component type from the drop-down list at the top of the page.
 - c. If you want to search by component code, then type the component code into the text entry field and click **Go**.

The wild card character (%) is allowed. The search is case sensitive.
 - d. Click **First**, **Previous**, **Next**, and **Last** to navigate within the table.
3. If you want to create a component, then click **Create**. This opens the page where you register a new component.
4. If you want to preview a component, then click **Preview**. This opens the page where you preview a component.
5. If you want to update or modify a component, then click its component code in the table. This opens the page where you update the registration of a component.

6. If you want to set the status of a component, then:

a. In the **Action** column, choose **Remove**, **Enabled**, or **Disabled**.

Removing a component deletes it. You cannot delete a LOV component if it is being used by other components. Enabling a component makes it available for display. Disabling a component makes it unavailable for display or for selection from the homepage.

b. Click **Update** to save.

Related Procedures

[Previewing Components](#)

[Registering Components](#)

[Using Declarative Components](#)

10.3 Previewing Components

Use this procedure to preview a declarative component. For an introduction to Declarative Components concepts, please see the topic [Understanding Declarative Components](#).

Steps

1. In the **Design** tab, navigate to **Declarative Components > Components**, then click **Preview**.

2. View the preview.

In the case of a LOV component, the Preview does not have validations. Use the wildcard character (%) in the text entry field.

3. When you are finished, click **OK** to return to the main components page.

Related Procedures

[Registering Components](#)

[Managing Components](#)

[Using Declarative Components](#)

10.4 Registering Components

Use this procedure to edit the registration details of a new or existing component. For an introduction to Declarative Components concepts, please see the topic [Understanding Declarative Components](#).

Steps

1. In the **Design** tab, navigate to **Declarative Components > Components**, then either click **Create** or click a component code in the table.
2. If you are creating a new component, then choose an application from the **Application** drop-down list at the top of the page. If you are updating an existing component, this field is not editable.
3. If you are creating a new component, then choose **Bin, Report, Graph, Graph Report**, or **LOV** from the **Component Type** drop-down list. If you are updating an existing component, this field is not editable.
4. If you are creating a new component, then type a component code into the **Component Code** field. If you are updating an existing component, this field is not editable.

The maximum length of a component code is 26 characters. A component code must be unique and it cannot contain any spaces or nonalphanumeric characters except underscore (_). It is recommended to prefix the component code with the application short name. For example, **JTF_component_code**.

5. Type a descriptive component name into the **Component Name** field.
6. Optionally, type a description into the **Description** field.

If you want to enable the component, then select the **Enable** check box. If you want to disable the component, then deselect the **Enable** check box. Enabling a component makes it available for display. Disabling a component makes it unavailable for display or for selection from the homepage.

7. If you want to allow the component to be a candidate for display as a Portlet in Oracle Portal, then select the **Show as Portlet** check box. If you deselect this check box, then the component will not be shown in the list of available components for Portlet enabling.
8. Optionally, type an image filename into the **Image Filename** field.

If defined, this image is displayed with the Bin Title. The image that you specify must exist in the image file location (/OA_MEDIA/).

9. Ignore the **Metadata Source** area. The only choice for the Type field is **AK**. The Declarative Components framework uses the AK Runtime Dictionary to store metadata.
10. Optionally, click **Restore** to restore the fields to their original settings.
11. Click **Update** to save.
12. Click **Next**. This opens the page where you can begin editing the metadata associated with this component.

Related Procedures

[Editing Component Metadata](#)

[Managing Components](#)

[Using Declarative Components](#)

10.5 Editing Component Metadata

Use this procedure to edit the Pre-Process type, Data Source, Title, and other general settings (such as headers and footers) of a new or existing Declarative Component. This procedure takes place after you have completed the [Registering Components](#) procedure. For an introduction to Declarative Components concepts, please see the topic [Understanding Declarative Components](#).

Steps

1. Edit the **Pre-Process** area:
 - a. If you want to execute a PL/SQL procedure or Java method before the Declarative Components framework extracts the data content for this component, then choose **Java Class Name** or **PL/SQL Procedure** from the **Type** drop-down list.

If you do not require a preprocessing event, then leave this field blank and skip to step 2.
 - b. Type the preprocessing PL/SQL procedure or Java method into the **Name** field. The procedure name should be of the format *procedure_name.package_name*, where the package name is the fully qualified package name.
2. Edit the **Data Source Provider** area:
 - a. If you are editing a Bin, Report, Graph, or Graph Report, then choose **HTML**, **Class Name**, or **SQL Query** from the **Type** drop-down list.

If you are editing a LOV component, then choose **Class Name** or **SQL Query** from the drop-down list, as the valid data source types for LOV components are Java and SQL.

- b. Type HTML code, a SQL query, or the name of a Java class that implements the DataSource interface into the **Name** field. If you use a SQL query, then the SELECT statement must not end with a semicolon (;).
3. If you are editing a Bin, Report, Graph, or Graph Report, then edit the **Custom Edit Link** area. This feature is not available for LOVs.
- a. If you do not want a Custom Edit Link, then leave this section blank and skip to step 4. This generates the default **Edit** link that navigates you to the Personalization and Runtime Parameter section.
 - b. If you want the Custom Edit Link to have a constant value, then choose **Constant** from the Type drop-down list.

If you want the Custom Edit Link to be dynamically generated by a PL/SQL procedure or Java method, then choose **PL/SQL** or **Java** from the **Type** drop-down list.

- c. If the Custom Edit Link is constant, then type the name of the JSP file into the **Name** field. If the Custom Edit Link is dynamically generated, then type the name of the PL/SQL package.procedure or Java Class.method into the **Name** field.

The PL/SQL procedure must take in a single DEFAULT NULL VARCHAR2 argument and return a VARCHAR2. The Java method should take in a ParameterList and return a String.

- d. If you do not want the Edit link to be generated, then choose **Constant** from in the **Type** drop-down list and leave the **Name** field blank.
4. Edit the **Title** area:

- a. If you want the component title to have a constant value, then choose **Constant** from the Type drop-down list.

If you want the component title to be dynamically generated by a PL/SQL procedure or Java method, then choose **PL/SQL** or **Java** from the **Type** drop-down list.

- b. If the component title is constant, then type the title text into the **Name** field. If the component title is dynamically generated, then type the name of the PL/SQL procedure or Java method into the **Name** field.

The PL/SQL procedure must return a value of the type VARCHAR2.

- c. Choose **Left**, **Right**, or **Center** from the **Alignment** drop-down list to set how the component title is aligned.
 - d. If you are editing a Bin, Report, Graph, or Graph Report and want to allow the end user to personalize the component title, then select the check box labeled **Personalizable**.
 5. If you are editing a Bin, Report, Graph, or Graph Report, then edit the **Header** area. This feature is not available for LOVs.
 - a. If you want the header to have a constant value, then choose **Constant** from the **Type** drop-down list.

If you want the header to be dynamically generated by a PL/SQL procedure or Java method, then choose **PL/SQL** or **Java** from the **Type** drop-down list.
 - b. If the header is constant, then type the text into the **Name** field. If the header is dynamically generated, then type the name of the PL/SQL procedure or Java method into the **Name** field.

The PL/SQL procedure must return a value of the type VARCHAR2.
 - c. Choose **Left**, **Right**, or **Center** from the **Alignment** drop-down list to set how the header is aligned.
 - d. If you want to allow the end user to personalize the header, then select the check box labeled **Personalizable**.
 6. If you are editing a Bin, Report, Graph, or Graph Report, then edit the **Footer** area. This feature is not available for LOVs:
 - a. If you want the footer to have a constant value, then choose **Constant** from the **Type** drop-down list.

If you want the footer to be dynamically generated by a PL/SQL procedure or Java method, then choose **PL/SQL** or **Java** from the **Type** drop-down list.
 - b. If the footer is constant, then type the text into the **Name** field. If the footer is dynamically generated, then type the name of the PL/SQL procedure or Java method into the **Name** field.

The PL/SQL procedure must return a value of the type VARCHAR2.
 - c. Choose **Left**, **Right**, or **Center** from the **Alignment** drop-down list to set how the footer is aligned.
 - d. If you want to allow the end user to personalize the footer, then select the check box labeled **Personalizable**.

7. Click **Update** to save.
8. Optionally, click **Next** to save and move on to screens where you can further define the columns and settings of the component.

Related Procedures

[Defining Bin or Report Columns](#)

[Managing LOV Columns](#)

[Defining Graph Metadata](#)

[Using Declarative Components](#)

10.6 Defining Bin or Report Columns

Use this procedure to manage the columns in a new or existing bin or report component. This does not apply to components with a HTML Data Source Type. For an introduction to Declarative Components concepts, please see the topic [Understanding Declarative Components](#).

Steps

1. To navigate to this page:
 - a. In the **Design** tab, navigate to **Declarative Components > Components**.
 - b. Locate your desired bin or report in the table. Click its component code in the table.
 - c. Click the **Next** button, once on the **Component Registration** page and again on the **Component Metadata** page to open the **Component Columns** page.
2. Select or deselect the check box labeled **Number Of Rows** to enable or disable allowing the end user to personalize the number of rows displayed.
3. Select or deselect the check box labeled **Number Of Columns** to enable or disable allowing the end user to personalize the number of columns displayed.
4. If you want to set the status of a column, then choose **Enabled** or **Disabled** from the **Action** column. Enabling a component makes it available for display. Disabling a component makes it unavailable for display.
5. Type integers into the **Display Order** column to set the display order (from left to right) of the columns in the Bin or Report. Make sure that the values of this field are sequential.

6. Click **Update** to save.
7. Optionally, click **Next**. This opens the page where you manage the parameters of the component.
8. If you want to edit the details of a column, then click its name in the table. This opens the page where you edit the details of a column.

Related Procedures

[Editing Bin or Report Column Details](#)

[Managing Parameters](#)

[Using Declarative Components](#)

10.7 Editing Bin or Report Column Details

Use this procedure to edit the details of columns in bin or report components. For an introduction to Declarative Components concepts, please see the topic [Understanding Declarative Components](#).

Steps

1. To navigate to this page:
 - a. In the **Design** tab, navigate to **Declarative Components > Components**.
 - b. Locate your desired bin or report in the table. Click its component code in the table.
 - c. Click the **Next** button, once on the **Component Registration** page and again on the **Component Metadata** page to open the **Component Columns** page.
 - d. Click a column name in the table to open the column details page.
2. Optionally, type a brief description of the column into the **Description** field.
3. Type an integer into the **Display Order** field to set the display order of the column.
4. Edit the **Label** area:
 - a. If you want the column label to have a constant value, then choose **Constant** from the Type drop-down list.

If you want the column label to be dynamically generated by a PL/SQL procedure or Java method, then choose **PL/SQL** or **Java** from the **Type** drop-down list.

- b. If the column label is constant, then type the text into the **Method** field. If the column label is dynamically generated, then type the name of the PL/SQL procedure or Java method into the **Method** field.

The PL/SQL procedure must return a value of the type VARCHAR2. The Java method must be of the format `ClassName.MethodName`.

- c. Choose **Left**, **Right**, or **Center** from the **Horizontal Alignment** drop-down list to set how the column label is aligned.
 - d. Select the check box labeled **Raw Column** if you want to display the column as a raw column.
 - e. If you selected the **Raw Column** check box, then type the appropriate URL into the **URL** field.
 - f. Choose the name of the ID column associated with the hyperlink from the **ID column** drop-down list.
 - g. Type a value into the **Low Watermark** field. When the component is displayed, any values below the Low Watermark value will display in a negative color.
 - h. Type a value into the **High Watermark** field. When the component is displayed, any values above the High Watermark value will display in a positive color.
5. Click **Update** to save.
 6. Click **Component Columns** to return to the page that lists the component's columns.

Related Procedures

[Defining Bin or Report Columns](#)

[Using Declarative Components](#)

10.8 Managing LOV Columns

Use this procedure to manage the columns in a new or existing LOV component. For an introduction to Declarative Components concepts, please see the topic [Understanding Declarative Components](#).

The LOVs that you create can be used across applications. LOV means "list of values." It is a UI component that facilitates the completion of a text entry field when there are numerous values that may be assigned. LOVs are a useful alternative to drop-down lists, particularly in cases where displaying a long list of selections in a drop-down list would require excessive scrolling.

In short, when using a LOV to complete a text entry field, you type a query into the field and then click a button labeled **Go**. This opens a screen where you view a list of values that match the query you submitted. You can then select the value that you desire and return to the original screen, where what you selected will populate the original text entry field.

Steps

1. To navigate to this page:
 - a. In the **Design** tab, navigate to **Declarative Components > Components**.
 - b. Locate your desired LOV in the table. Click its component code in the table.
 - c. Click the **Next** button, once on the **Component Registration** page and again on the **Component Metadata** page to open the **LOV Columns List** page.
2. Choose a radio button in the **Select** column of the table to specify that column as searchable.
3. Choose **Enabled** or **Disabled** from the **Action** column in the table to make the column available or unavailable for display.
4. Type an integer into the **Display Order** field to set the display order of the column. Make sure that the values of this field are sequential.
5. Click **Update** to save. Note that you do not define parameters for LOV components.
6. If you want to edit the details of a column, then click its name in the table. This opens the page where you edit the details of a column.

Related Procedures

[Editing LOV Column Details](#)

[Using Declarative Components](#)

10.9 Editing LOV Column Details

Use this procedure to edit the details of columns in a new or existing LOV component. For an introduction to Declarative Components concepts, please see the topic [Understanding Declarative Components](#).

The LOVs that you create can be used across applications. LOV means "list of values." It is a UI component that facilitates the completion of a text entry field when there are numerous values that may be assigned. LOVs are a useful alternative to drop-down lists, particularly in cases where displaying a long list of selections in a drop-down list would require excessive scrolling.

In short, when using a LOV to complete a text entry field, you type a query into the field and then click a button labeled "Go." This opens a screen where you view a list of values that match the query you submitted. You can then select the value that you desire and return to the original screen, where what you selected will populate the original text entry field.

Steps

1. To navigate to this page:
 - a. In the **Design** tab, navigate to **Declarative Components > Components**.
 - b. Locate your desired LOV in the table. Click its component code in the table.
 - c. Click the **Next** button, once on the **Component Registration** page and again on the **Component Metadata** page to open the **LOV Columns List** page.
 - d. Click a column name in the table to open the column details page.
2. Optionally, type a brief description of the column into the **Description** field.
3. Type an integer into the **Display Order** field to set the display order of the column.
4. Choose a column type of **Date**, **Number**, or **Varchar2** from the **Column Type** drop-down list.
5. If the column is searchable on the main LOV columns page, then the check box fields for **Display** and **Carry Over** are automatically selected and cannot be deselected. If the column is not searchable on the main LOV columns page, then you can select or deselect these two check boxes.
6. Edit the **Label** area:
 - a. If you want the column label to have a constant value, then choose **Constant** from the **Type** drop-down list.

10.10 Defining Graph Metadata

Use this procedure to edit the X-axis, Y-axis, and other basic settings of a new or existing graph component. For an introduction to Declarative Components concepts, please see the topic [Understanding Declarative Components](#).

Steps

1. To navigate to this page:
 - a. In the **Design** tab, navigate to **Declarative Components > Components**.
 - b. Locate your desired graph or graph-report in the table. Click its component code in the table.
 - c. Click the **Next** button, once on the **Component Registration** page and again on the **Component Metadata** page to open the **Graph Metadata** page.
2. Optionally, type a description of the graph into the **Description** field.
3. If you want the graph title to have a constant value, then choose **Constant** from the **Type** drop-down list.

If you want the graph title to be dynamically generated by a PL/SQL procedure or Java method, then choose **PL/SQL** or **Java** from the **Type** drop-down list.

4. If the graph title is constant, then type the text into the **Method** field. If the column label is dynamically generated, then type the name of the PL/SQL procedure or Java method into the **Method** field.

The PL/SQL procedure must return a value of the type VARCHAR2. The Java method must be of the format `ClassName.MethodName`.

5. Choose a graph type from the **Graph Type** drop-down list.
6. If you want to allow the end user to personalize the graph type, then select the check box labeled **Allow Personalization?**
7. If you want the graph to display in 2D, then select the check box labeled **Display in 2-D?**
8. If you want to display or not display a grid, then choose an option from the **Display Grid** drop-down list.
9. To set how the graph legend displays, choose an option from the **Graph Legend** drop-down list. Set the position of the graph legend in the **Legend Position** drop-down list.
10. Type pixel values into the **Graph Height** and **Graph Width** fields.

11. Type a number into the **Graph Color** field to set the graph color.
12. Edit the **X-axis** section:
 - a. If you want the X-axis label to have a constant value, then choose **Constant Value** from the **Label Type** drop-down list.

If you want the X-axis label to be dynamically generated by a PL/SQL procedure or Java method, then choose **PL/SQL** or **Java** from the **Label Type** drop-down list.
 - b. If the X-axis label is constant, then type the text into the **Method** field. If the X-axis label is dynamically generated, then type the name of the PL/SQL procedure or Java method into the **Method** field.

The PL/SQL procedure must return a value of the type VARCHAR2. The Java method must be of the format ClassName.MethodName.
 - c. Choose **Vertical**, **Horizontal** or **Slanting** from the **Tick Label Orientation** drop-down list.

Vertical orientation tilts the tick label 90 degrees. Horizontal orientation tilts the tick label 180 degrees. Slanted orientation tilts the tick label 270 degrees.
 - d. Choose the amount of tick labels you want to display in the **Tick Label Interval** drop-down list.
13. Edit the **Y-axis** section:
 - a. If you want the Y-axis label to have a constant value, then choose **Constant Value** from the **Label Type** drop-down list.

If you want the Y-axis label to be dynamically generated by a PL/SQL procedure or Java method, then choose **PL/SQL** or **Java** from the **Label Type** drop-down list.
 - b. If the Y-axis label is constant, then type the text into the **Method** field. If the Y-axis label is dynamically generated, then type the name of the PL/SQL procedure or Java method into the **Method** field.

The PL/SQL procedure must return a value of the type VARCHAR2. Java method must be of the format ClassName.MethodName.
 - c. Choose **Vertical**, **Horizontal** or **Slanting** from the **Tick Label Orientation** drop-down list.

Vertical orientation tilts the tick label 90 degrees. Horizontal orientation tilts the tick label 180 degrees. Slanted orientation tilts the tick label 270 degrees.

- d. To display the Y-axis as currency, select the **Display Currency?** check box.
 - e. Choose **Yes** or **No** from the **Auto Scaling** drop-down list.
If you choose Yes, then the minimum and maximum values displayed on the Y-axis are determined by BI Beans, depending on the graph data. If you choose No, then the minimum and maximum values displayed on the Y-axis are specified manually.
 - f. If you chose No in step d, then type an integer into the **Tick Interval** field to specify the interval on the Y-axis scale.
 - g. If you chose No in step d, then enter integers into the **Minimum Value** and **Maximum Value** fields.
14. Click **Update** to save.
 15. Click **Next** to open the page where you manage the columns of the graph component.

Related Procedures

[Managing Graph Columns](#)

[Editing Graph Column Details](#)

[Using Declarative Components](#)

10.11 Managing Graph Columns

Use this procedure to view, update, and remove columns in a graph component. For an introduction to Declarative Components concepts, please see the topic [Understanding Declarative Components](#).

Steps

1. To navigate to this page:
 - a. In the **Design** tab, navigate to **Declarative Components > Components**.
 - b. Locate your desired graph or graph-report in the table. Click its component code in the table.
 - c. Click the **Next** button, once on the **Component Registration** page and again on the **Component Metadata** page to open the **Graph Metadata** page.
 - d. Click **Next** a third time to open the **Graph Columns** page.

2. If you want to set the status of a column, then choose **Enabled** or **Disabled** from the **Action** column.

Enabling a component makes it available for display. Disabling a component makes it unavailable for display.
3. For each column, choose **X-axis**, **Y-axis**, or **SubX-axis** from the **Axis** drop-down list.
4. Type integers into the **Sequence** fields to set the sequence of the columns.
5. Click **Update** to save.
6. Optionally, click **Next**.

This opens the page where you manage the parameters of the component.
7. If you want to edit the details of a column, then click its name in the table.

This opens the page where you edit the details of a column.

Related Procedures

[Editing Graph Column Details](#)

[Managing Parameters](#)

[Using Declarative Components](#)

10.12 Editing Graph Column Details

Use this procedure to edit the details of new or existing columns in graph components. For an introduction to Declarative Components concepts, please see the topic [Understanding Declarative Components](#).

Steps

1. To navigate to this page:
 - a. In the **Design** tab, navigate to **Declarative Components > Components**.
 - b. Locate your desired graph or graph-report in the table. Click its component code in the table.
 - c. Click the **Next** button, once on the **Component Registration** page and again on the **Component Metadata** page to open the **Graph Metadata** page.
 - d. Click **Next** a third time to open the **Graph Columns** page.

- e. Click a column name in the table.
2. Optionally, type a description into the **Description** field.
3. Edit the **Label** section:
 - a. If you want the column label to have a constant value, then choose **Constant Value** from the **Type** drop-down list.

If you want the column label to be dynamically generated by a PL/SQL procedure or Java method, then choose **PL/SQL** or **Java** from the **Type** drop-down list.
 - b. If the column label is constant, then type the text into the **Method** field. If the column label is dynamically generated, then type the name of the PL/SQL procedure or Java method into the **Method** field.

The PL/SQL procedure must return a value of the type VARCHAR2. The Java method must be of the format `ClassName.MethodName`.
4. Edit the **Axis** section:
 - a. Choose **X-axis**, **Y-axis**, or **SubX-axis** from the **Plot** drop-down list.
 - b. Type the appropriate integer into the **Sequence** field.

The sequence number is with respect to axis information. It is the indexing information for columns mapped on the same axis. For example, if COL1 and COL3 are plotted on the Y-axis, then they should have the sequence numbers 1 and 2, respectively. COL2 plotted on the X-axis should have the sequence number 1.
5. Click **Update** to save.
6. Click **Graph Columns** to return to the page that lists the component's columns.

Related Procedures

[Managing Graph Columns](#)

[Using Declarative Components](#)

10.13 Managing Parameters

Use this procedure to create, update, and remove component parameters. You can define date pickers (calendars), text input fields, drop-down lists, multi-select lists, and hidden fields. For an introduction to Declarative Components concepts, please see the topic [Understanding Declarative Components](#).

Steps

1. You reach this page by clicking **Next** from the column summary page of a component. Please see [Defining Bin or Report Columns](#) and [Managing Graph Columns](#).
2. If you want to create a parameter, then click **Create Parameter**.
This opens the page where you edit the details of a new parameter.
3. If you want to delete a parameter, then select the appropriate check box in the **Remove** column of the table.
4. Type integers into the **Sequence** fields to set the order in which the parameters will be rendered. This order is also used in parameter value resolution.
5. Click **Update** to save.
6. If you want to edit the details of a parameter, then click its name in the table.

This opens the page where you edit the details of an existing parameter.

Related Procedures

[Using Declarative Components](#)

10.14 Editing Parameter Metadata

Use this procedure to edit the details of a new or existing component parameter. For an introduction to Declarative Components concepts, please see the topic [Understanding Declarative Components](#).

Steps

1. You reach this page from the **Component Parameters** page: Click either a parameter name or the **Create Parameters** button.
2. Type a unique parameter name into the **Parameter Name** field (this field is not editable if you are working with a parameter that already has been defined).
3. Type a label for the parameter in to the **Label** field.
4. Select the **Enable?** check box if you want to enable the parameter.
5. Optionally, type a brief description into the **Description** field.
6. If you want the parameter to be rendered on the parameter page, then select the check box labeled **Enable**.

7. If you want to allow the end user to personalize the parameter, then select the check box labeled **Personalizable**.
8. Choose **VARCHAR2, Number, or Date** from the **Parameter Data Type** drop-down list.
9. Choose **Calendar, Drop Down, Hidden, LOV, Multiselect, or Text** from the **Item Style** drop-down list.

For drop-down lists, you are responsible for writing a well-tuned query that will return the number of rows as recommended by the UI team. For hidden fields, the end user will not see the parameter, but you can use the value as needed (for example, passing ID columns).

10. If you chose the Item Style **Drop Down** in step 6, then type the appropriate source SQL query into the **SQL for Dropdown** field.
11. If you chose the Item Style **LOV** in step 6, then the screen refreshes to display a section about LOV details. This section includes fields for **LOV App Id, LOV Component Code, and Mapped LOV Column**:
 - a. Choose an LOV App Id from the drop-down list. This is the application that owns the LOV component. When you have chosen the application, the screen refreshes to display a list of LOV components specific to that application.
 - b. Choose a LOV component from the list of available choices. The screen refreshes to display the list of searchable columns that can be mapped to the current parameter.
 - c. Choose the Searchable LOV column and map it to this parameter.
 - d. You may need to create additional parameters if you want to carry over ID Columns.
12. If you chose the Item Style **LOV** in step 6 and there is a LOV parameter already defined for this component, then the screen refreshes to display a drop-down list called **Related LOV Parameter**. The drop-down list contains all the LOV parameters that have been defined for this component:
 - a. Choose a LOV parameter as the Related LOV parameter. The screen refreshes to display a list of the Carried Over Column(s) of the chosen LOV parameter.
 - b. The **Mapped LOV Column** drop-down list displays the LOV Columns that have been defined to be carried over. Therefore, you can use the value of this Mapped LOV Column, for example, in a Data Source Query.

13. If available, edit the **Default Value Setting** section:
 - a. Choose **Constant**, **PL/SQL**, or **Java** from the **Type** drop-down list.
 - b. If you chose **Constant** in step a, then type the text of the default value into the **Name** field.

If you chose **PL/SQL** in step a, then type the complete signature of a PL/SQL function, including any package name, into the **Name** field. This function must return a Varchar2. For example, `My_Package.Get_Default_Value(?P_Context)`. Optionally, the function can take a `p_context` as an argument.

If you chose **Java** in step a, then type the signature of a Java method into the **Name** field, in the format `package_name.function_name`. This method must return a string.
14. Click **Update** to save.
15. Optionally, click Component **Parameter** to return to the page that lists the component's parameters.

Related Procedures

[Managing Parameters](#)

[Using Declarative Components](#)

10.15 Managing Component Security

Use this procedure to manage component security assignments. For an introduction to Declarative Components concepts, please see the topic [Understanding Declarative Components](#).

Steps

1. In the **Design** tab, navigate to **Declarative Components > Component Security**.
2. Choose a radio button, **Component to Responsibilities** or **Responsibility to Components**.
3. Click **Next**.

This opens the page where you choose either the component that you will be mapping to responsibilities or the responsibility that you will be assigning to components.

Related Procedures

[Assigning a Component to Responsibilities](#)

[Assigning a Responsibility to Components](#)

[Using Declarative Components](#)

10.16 Assigning a Component to Responsibilities

Use this procedure to assign a component to one or more responsibilities. For an introduction to Declarative Components concepts, please see the topic [Understanding Declarative Components](#).

Steps

1. In the **Design** tab, navigate to **Declarative Components > Component Security**, then select the radio button labeled **Component to Responsibilities**.
2. Choose an application from the **Application Code** drop-down list.
3. Choose a component code from the **Component Code** drop-down list.
4. Click **Next** to continue.

Related Procedures

[Selecting Responsibilities](#)

[Managing Component Security](#)

[Using Declarative Components](#)

10.17 Selecting Responsibilities

Use this procedure to select which responsibilities will apply to the component that you have chosen. This procedure takes place after you have completed the [Assigning a Component to Responsibilities](#) procedure. For an introduction to Declarative Components concepts, please see the topic [Understanding Declarative Components](#).

Steps

1. Choose the name of a responsibility in one list and click **>** or **<** to move it to the other list.
2. Repeat step 1 as desired.

3. If you want to move all **Available Responsibilities** to the **Selected Responsibilities** list, then click >>.
4. If you want to move all **Selected Responsibilities** to the **Available Responsibilities** list, then click <<.
5. Optionally, choose an application from the **Responsibility App Code** drop-down list.
6. Optionally, click **Restore** to reset the fields to their original settings.
7. Click **Update** to save.

Related Procedures

[Managing Component Security](#)

[Using Declarative Components](#)

10.18 Assigning a Responsibility to Components

Use this procedure to assign a responsibility to one or more components. For an introduction to Declarative Components concepts, please see the topic [Understanding Declarative Components](#).

Steps

1. In the **Design** tab, navigate to **Declarative Components > Component Security**, then select the radio button labeled **Responsibility to Components**.
2. Choose an application from the **Responsibility App Code** drop-down list.
3. Choose a responsibility from the **Responsibility** drop-down list.
4. Click **Next** to continue.

Related Procedures

[Selecting Components](#)

[Managing Component Security](#)

[Using Declarative Components](#)

10.19 Selecting Components

Use this procedure to select which components will apply to the responsibility that you have chosen. This procedure takes place after you have completed the procedure [Assigning a Responsibility to Components](#). For an introduction to Declarative Components concepts, please see the topic [Understanding Declarative Components](#).

Steps

1. Choose the name of a component in one list and click > or < to move it to the other list.
2. Repeat step 1 as desired.
3. If you want to move all **Available Components** to the **Selected Components** list, then click >>.
4. If you want to move all **Selected Components** to the **Available Components** list, then click <<.
5. Optionally, choose an application from the **Component App Code** drop-down list.
6. Optionally, click **Restore** to reset the fields to their original settings.
7. Click **Update** to save.

Related Procedures

[Managing Component Security](#)

[Using Declarative Components](#)

Using the Homepage Subtab

11.1 Configuring Default Homepages

Use this procedure to set up default homepages for users who do not personalize their homepages. If a homepage is configured for a particular responsibility, then all users of that responsibility who have not already personalized their homepages will see this configuration by default. As soon as a user personalizes his or her homepage, then the default configuration will no longer be seen. A homepage has either two columns or three columns. Components in a column are selected from an available list and laid out vertically. For more information on UI components, please see [Understanding Declarative Components](#).

Steps

1. In the **Design** tab, navigate to **Homepage > Configuration**.
2. Choose an application name from the **Select an application** drop-down list.
3. Choose a responsibility from the **Select a responsibility** drop-down list.
4. Choose a layout, either **Two Columns** or **Three Columns**, from the **Select a layout** drop-down list. Once you have set the value of this field, do not change it again unless you are willing to lose all edits you have made to the column setup lists below.
5. Set up the bins and modules that will display in each column as follows:
 - a. Choose the name of a bin or module in one list and click > or < to move it to the other list.
 - b. Repeat step b as desired.
 - c. If you want to move all bins or modules from one list to the other, then click >> or <<.

- d. In a **Displayed Bins** or **Displayed Modules** list, you can highlight an entry and then click the up and down arrows to set the order in which bins or modules displays in that column.
6. Click **Update** to save.

Setting Profile Options

12.1 Setting Navigation Preferences

Use this procedure to set navigation preferences.

Steps

1. Click the **Profile** button, then select **Navigation Preferences**.
2. If you want to change your current responsibility, then choose an option from the **Current Responsibility** drop-down list.
3. If you want to set default responsibilities for registered Navigation Groups, then choose from the drop-down lists in the **Default Responsibility** column.

For information on Navigation Groups, please see [Understanding the Interapplication Bar](#) and [Setting Up the Interapplication Bar](#).

4. Optionally, click **Restore** to reset the fields to their original settings.
5. Click **Update** to save.

12.2 Setting Display Preferences

Use this procedure to set display preferences.

Steps

1. Click the **Profile** button, then select **Display Preferences**.
2. Choose options from the drop-down lists in the **General Display** section to select language, currency, date format, time zone, and display style settings.

3. Choose numbers from the drop-down lists in the **Table Display** section to select how many rows to display per page and how many blank rows to display per table.
4. In the **Search Display** section, choose the radio button that suits how you want the Quick Find to return results.
5. Optionally, click **Restore** to reset the fields to their original settings.
6. Click **Update** to save.

12.3 Setting Up the Quick Menu

The Quick Menu is a feature that allows you to display links to your most frequently visited pages on the Introduction pages of every subtab in the System Administrator Console. Use this procedure to choose which pages have links in the Quick Menu and also turn the Quick Menu on or off.

Steps

1. Click the **Profile** button, then select **Quick Menu**.
2. Select or deselect the check box labeled **Display the Quick Menu** to turn the Quick Menu on or off.
3. Choose the name of a menu in one list and click > or < to move it to the other list.
4. Repeat step 3 as desired.
5. If you want to move all **Available Menus** to the **Favorite Menus** list, then click >>.
6. If you want to move all **Favorite Menus** to the **Available Menus** list, then click <<.
7. Optionally, click the up and down arrows to change the sequence of menus in the Favorite Menus list.
8. Optionally, click **Restore** to reset the fields to their original settings.
9. Click **Update** to save.

12.4 Changing Your Password

Use this procedure to change your password.

Steps

1. Click the **Profile** button, then select **Change Password**.
2. Type your current password into the **Current Password** field.
3. Type your new password into the **New Password** field.
Passwords must be at least six characters long.
4. Retype your new password into the **Re-Enter New Password** field.
5. Optionally, click **Restore** to reset the fields to their original settings.
6. Click **Update** to save.

12.5 Setting Personal Information

Use this procedure to edit your personal information.

Steps

1. Click the **Profile** button, then select **Personal Information**.
2. Edit the fields as desired.
3. Optionally, click **Restore** to reset the fields to their original settings.
4. Click **Update** to save.

12.6 Setting Address Information

Use this procedure to edit your address information.

Steps

1. Click the **Profile** button, then select **Address Information**.
2. Edit the fields as desired.
3. Optionally, click **Restore** to reset the fields to their original settings.
4. Click **Update** to save.

12.7 Viewing Quick Find Search Results

The Quick Find feature appears underneath each page's tabs. Use this procedure to view the results of a Quick Find search operation.

Prerequisites

1. Choose an item from the Quick Find drop-down list.
2. Type a search query into the text input field. Optionally, you can use the wildcard character (%) as needed. For example, to find items that begin with "crm," type "crm%" into the text input field.
3. Click **Go**.

Steps

1. The search results display.

Note: If in the Display Preferences page you have selected the option "Go to record detail when there is one result," then you will not see this page. Instead, you will bypass this page and be automatically redirected to the page that resulted from your search.

2. Click one of the links offered to you in the Search Results list.
You will be redirected to the associated record detail page.