**Oracle Process Cloud Service – Sites Components  
Install and Configuration Guide**

PCS and DOCS 16.4.5 and 17.1.3

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# Introduction

This document describes installing and configuring the Oracle Process Cloud Service (PCS) Sites Components. This package is delivered as a Site Cloud Service (SCS) template and contains a sample Site and four PCS Components. The four components are:

|  |  |
| --- | --- |
| **Process Start Form** | This component displays the Start Form for a specific PCS Application. |
| **Process Task Detail** | This component will display the Task Form, for a specific PCS Application, that has been selected in the Process Task List component |
| **Process Conversation** | This component will display the Conversation associated with the newly initiated process from the Process Start Form component |
| **Process Task List** | This component display a list of Process Tasks for the current logged in user. |

These components will work on the OPC version of Process Cloud Service (16.3.5) and Document Cloud Service (16.3.5).

# Pre-requisites

* These components will work with version 16.4.5 and 17.1.3 of the Process Cloud Service and Document Cloud Service.
* The PCS Server and DOCS Server must be in the same domain.
* For the Process Start Form, you will need to have at least one Process Application deployed that contains a Start Form activity.
* If you publish your site, it must be configured to use Authentication in order for the Process Conversation component to work properly.

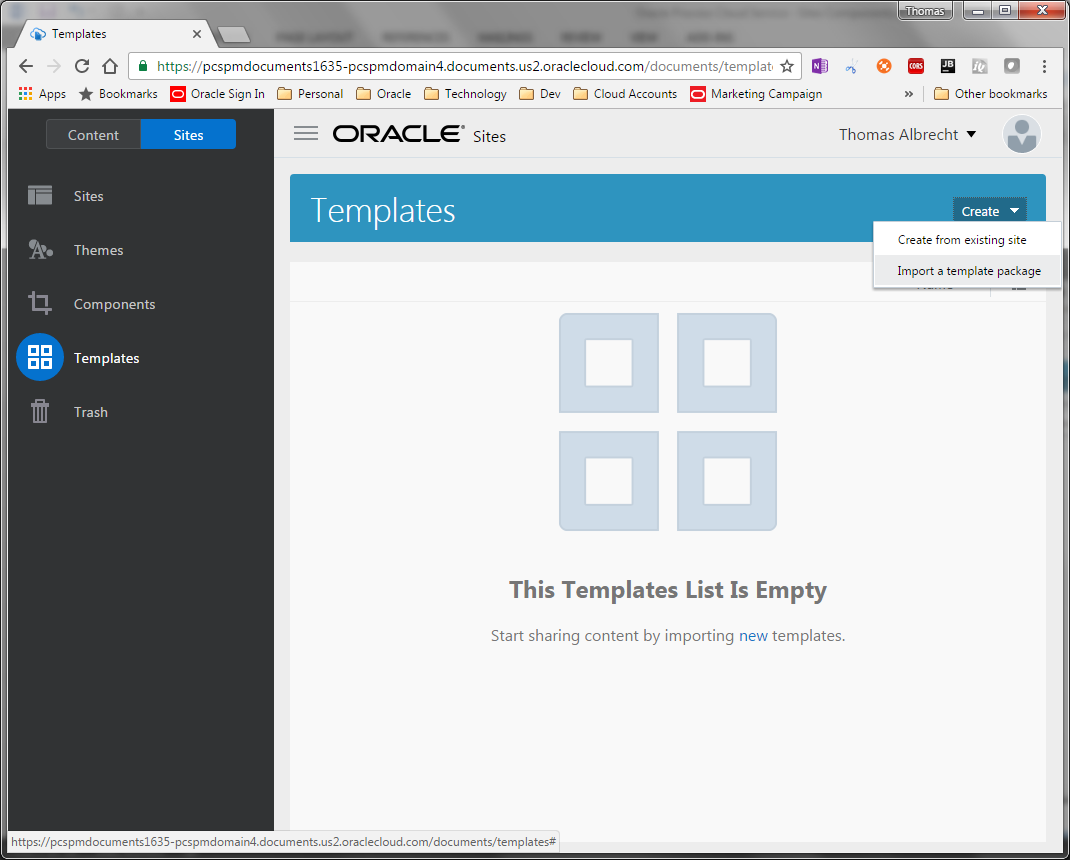
# Install and Configuration

This section describes how to install and configure the Process Components.

## Importing the Sites Template

The Sites template contains the four components, a sample theme, and a sample site. The site can be used just to test the four Process Components. Once the template is imported, the four components can be used on any site.

1. Login to the Document Cloud Service (DOCS)
2. Upload the Process\_Components\_Template.zip file to a location in your Document Cloud Service
3. Import the Template (see screenshot below)
   1. From DOCS, select the Sites tab and then select Templates.
   2. Select Import a template package from the Create menu
   3. Select the Process\_Components\_Template.zip from the location you uploaded it into DOCS.



## Creating a Site from the Template

Now that the template is imported, you can create a new Site from the template

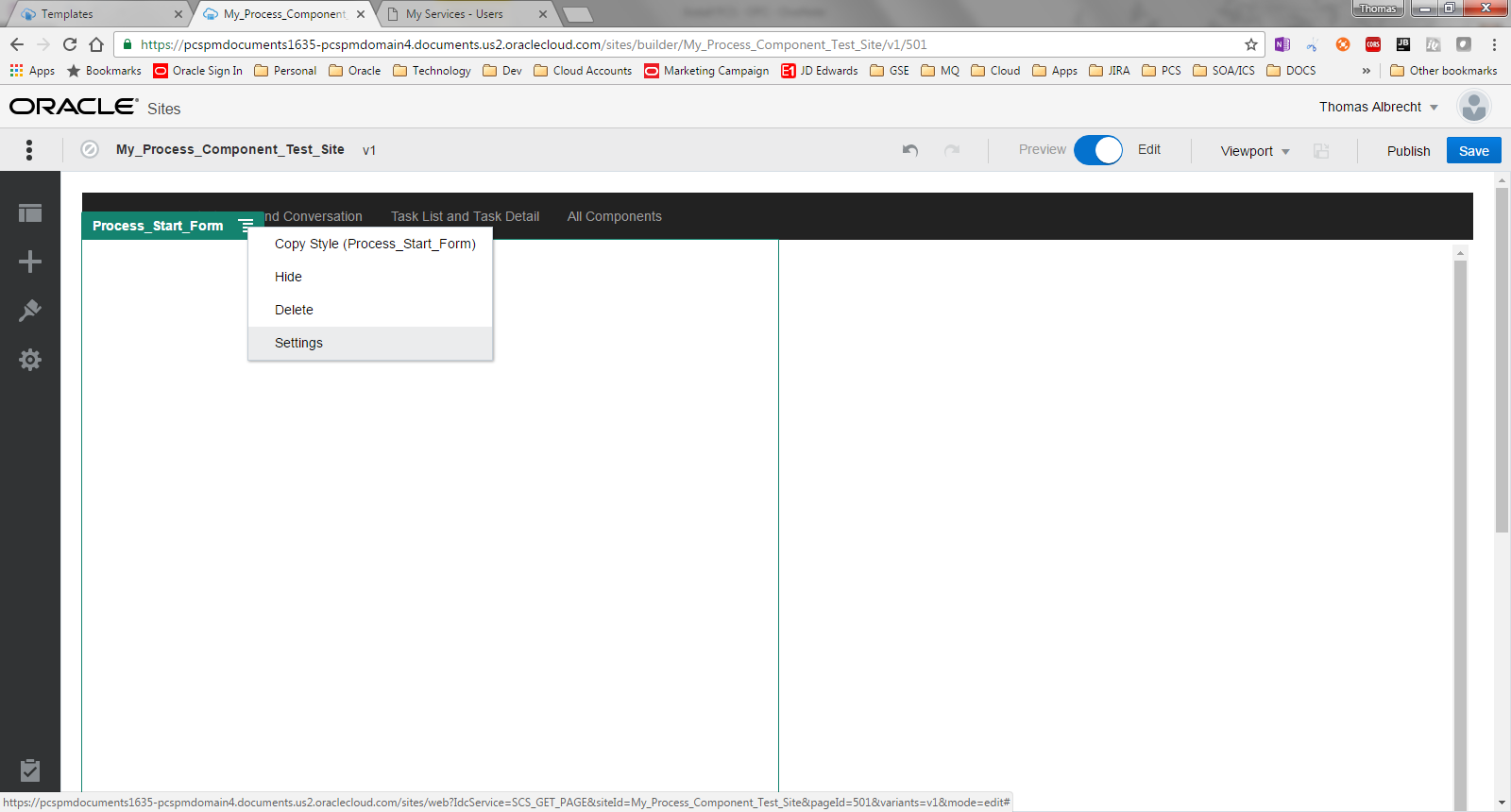
1. Select Sites from the left menu
2. Select the Create button
3. From the Create Site dialog, select the Process\_Components\_Template, enter a name for your site, and then select the Create button at the bottom.
4. Your site is now created.

## Configuring and testing the Components

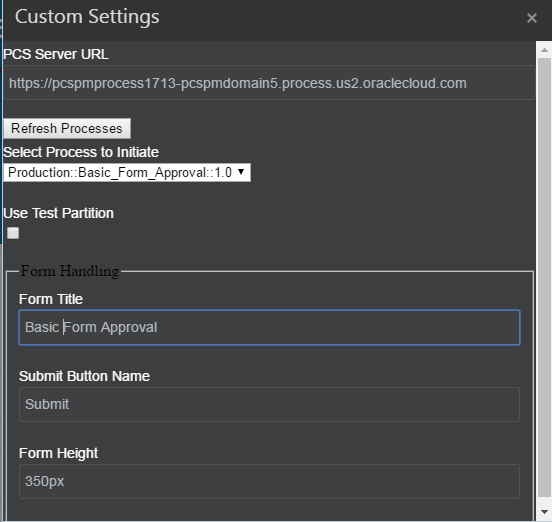
The Test site has a single page that allow for the testing of the Process Components. You can drop each of the components onto the page. The following sections document how to configure the Process Components and how they work together.

### Start Form and Conversation

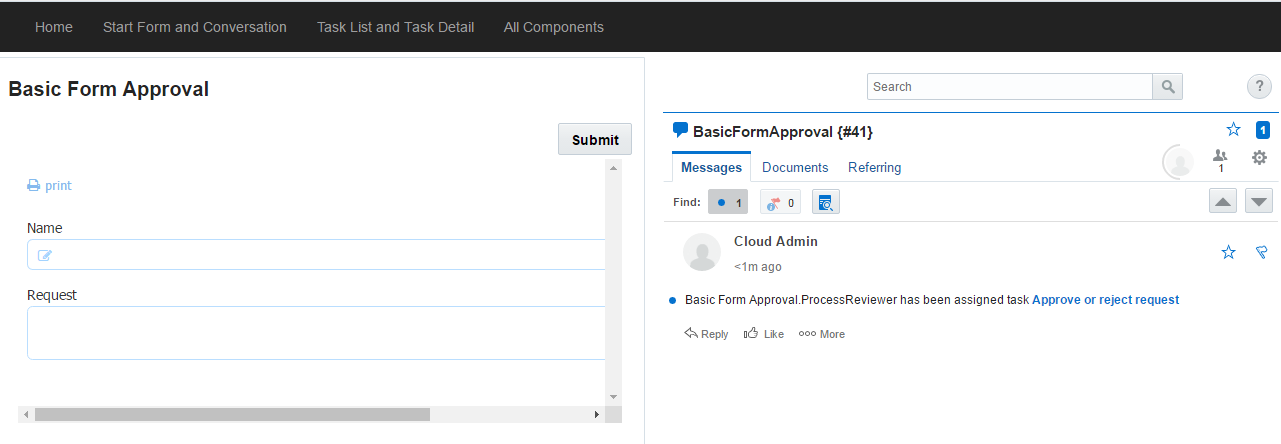
1. Select to Edit the new Site
2. Toggle the Preview button to Edit
3. Select the  button, and then select Custom card.
4. Drop the Process\_Start\_Form component on to the page.
5. Drop the Process\_Conversation component on to the page.
6. Select the Process Start Form component in the page, select the  menu, and then Settings.



1. In the Setting dialog, select Custom Settings.
2. In the Custom Setting dialog, enter the PCS Server URL.
3. If your process list does not populate, select Refresh Processes button.
4. A list of PCS processes contained on the PCS server entered, that have a Start Form Start Event Activity will be displayed in the list:
   1. NOTE: This list will only display a list of PCS processes that have a Start Form activity and that the user specified has access to. Make sure you have assigned this specified user to the swimlane role where the Start activity exists in the process.

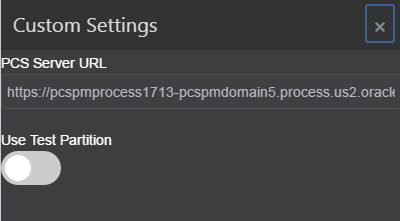


1. Optionally, you can enter a Form Title, a different name for the Submit button, and/or set the size of the form that will be displayed within the Sites window.
   1. NOTE: The Sites Component window can be set on the Settings dialog (previous dialog to the Custom Settings).
2. Close the Custom Settings dialog
3. Close the Settings dialog
4. Toggle the Edit toggle to Preview.
5. The Start Form for the process you selected should be displayed.
6. Enter in the data requested into your form and select the Submit button.
7. **Result**: The Form is submitted and cleared and the Conversation for that instance is displayed in the Process Conversation window (see example below)

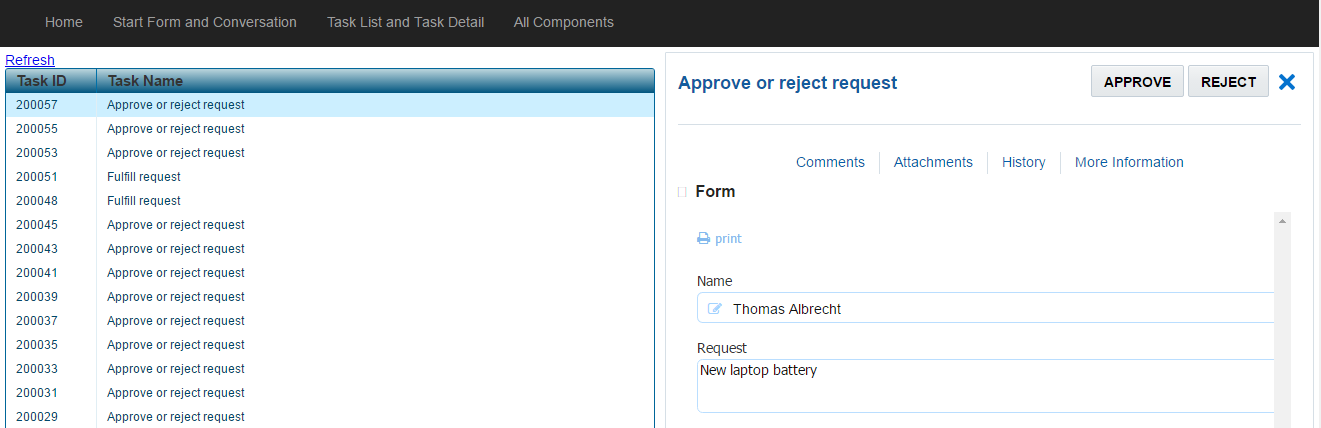


### Task List and Task Detail

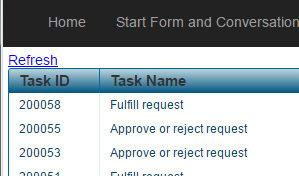
1. Select to Edit the new Site
2. Toggle the Preview button to Edit
3. Drop the Process\_Task\_List component on to the page.
4. Drop the Process\_Task\_Detail component on to the page.
5. Select the Task List component in the page, select the  menu, and then Settings.
6. In the Setting dialog, select Custom Settings.
7. In the Custom Setting dialog, enter the PCS Server URL.



1. Note: This task list component only operates against the production partition. The production version of this component will be release by the Sites team in the near future.
2. Close the Custom Settings dialog
3. Close the Settings dialog
4. Toggle the Edit toggle to Preview.
5. The Task List will be displayed with all the current task for the entered user.
6. Select a Task in the List.
7. **Result**: The Task Detail form is displayed for the selected task.



1. Select the Approve button.
2. **Result**: Observe that the task list has been update with the previous task completed and a new task for the next step in the process



## Additional Information

* If you publish your site, you will need to remember to turn on Authentication for the published site. Select the Site (make sure the site is not active) and select the Share menu option. See screenshot below.

