



# **Siebel Content Publishing Guide**

Version 8.0

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# 1

## What's New in This Release

### **What's New in Oracle's Siebel Content Publishing Guide, Version 8.0**

This guide has been updated to reflect product name changes. It was previously published as *Siebel Content Publishing Guide*, Version 7.8.



# 2

## Content Center

This chapter describes the features of Content Center. It includes the following topics:

- "About Content Center" on page 11
- "Content Center Job Roles and Terms" on page 13
- "Scenario for Using Content Center" on page 15
- "Process of Setting Up and Using Content Center" on page 16
- "Setting Up a Content Staging Environment" on page 17
- "Configuring Content Objects for Content Center" on page 19
  - "Modifying Business Components for Content Center" on page 19
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- "Contributing and Approving Content (End User)" on page 30
- "Publishing Content Projects" on page 31

## About Content Center

Content Center allows you to create and manage authored content, which includes items such as price lists, service solutions, and static Web site content, for Siebel Business Applications.

Content Center features include:

- **Preview and simulation.** You can use a content staging environment to preview and test content before you publish it to your production environment. The staging environment displays content exactly as it will appear to customers, employees, and partners in your production environment. The staging environment runs on a separate database from the production environment.

- **Content projects.** You can group a set of content items into one content project, so that related changes can be made together. For example, you can create a content project to manage the products, catalog categories, price lists, and marketing literature for your company's summer catalog.
- **Approval processes.** You can use Siebel Business Process Designer to design approval processes that allow team members to review a content item before it is published. Siebel Business Process Designer allows you to assign tasks based on a predefined list of content contributors and approvers.
- **Publishing.** After content is approved, Content Center uses Siebel Business Process Designer to publish it to a production environment. The XML-based publication business service can handle both complex database content and unstructured content that is stored in the file system. This component helps maintain transactional integrity between all the items in a content project.

# Content Center Job Roles and Terms

Descriptions of Content Center job roles are in [Table 1](#), and terms are defined in [Table 2](#).

Table 1. Content Center Job Roles

| Position              | Responsibilities   |
|-----------------------|--|
| Content Administrator | <p>One or more people in your business who are authorized to administer content. These people need to understand your business requirements in order to know what types of content and content items need to be managed and the appropriate contributor and approver workflows.</p> <p>Depending on your business requirements, one or more of these people may also be responsible for selecting and possibly configuring the appropriate business components, content objects, and content types. Alternatively, this may be done by an application developer.</p> |
| Content Contributor   | <p>A person in your business who is authorized to contribute content items. Examples are technical writers, Web designers, and graphic artists.</p>  |
| Content Approver      | <p>A person in your business who is authorized to approve content posted to your company's Web site. Examples are managers and your company's attorneys.</p>   |

Table 2. Content Center Terms

| Term           | Description  |
|----------------|--|
| Content        | <p>The components of the application that are authored, as opposed to application code. Siebel applications recognize the following classes of content:</p> <ul style="list-style-type: none"> <li>■ Business rules, such as personalization rules and assignment rules.</li> <li>■ Application content, such as product catalog, price lists, and product promotions.</li> <li>■ Web content, such as Web templates and static Web pages, typically stored as HTML, XML, and image files.</li> <li>■ Documentation, such as product data sheets, forms, and white papers.</li> </ul> <p>Content Center provides content production services for three of the classes listed above: application content, Web content, and documentation; content asset management only applies to Web content and documentation.</p> |
| Content Asset  | <p>An instance of content managed within Content Center and stored in the content asset repository. Content assets are typically comprised of unstructured markups and can be related to other content assets. For example, an HTML content asset can link to other pages or reference images. For more information, see <a href="#">Chapter 3, "Content Asset Management."</a></p>  |
| Content Item   | <p>Represents a transaction (add, update, delete) stored and associated with a piece of content.</p>   |
| Content Object | <p>Specifies the information that will be transferred from the staging environment to the production environment when the content is published. Each content object is composed of a business object and an integration object.</p>  |

Table 2. Content Center Terms

| Term               | Description   |
|--------------------|---|
| Content Type       | <p>A set of business rules you define for handling content, including rules that apply to the approval workflow, contributors, approvers, and the application views your company uses to edit or preview content. Each content type is based on a content object, and is associated with an approval workflow and a group of contributors and approvers.</p> <p>The following are examples of content types authored in Siebel applications that can be managed through Content Center:</p> <ul style="list-style-type: none"> <li>■ Siebel Sales Catalog: catalog, categories, product, product line, and product literature.</li> <li>■ Siebel Pricer: price list, pricing factor, rate list, and volume discount .</li> <li>■ Siebel Marketing: offers (Web, phone, email, direct mail, newsletter), campaign, and marketing development fund.</li> <li>■ Siebel Service: service solution, decision issue, resolution document, and SmartScript.</li> </ul> |
| Content Asset Type | The file type (or filename extension) of a content asset.   |

## Scenario for Using Content Center

This scenario provides an example of a process flow performed by a content administrator (in this case, the business manager), a Web site designer, an application developer, and content contributors and approvers. Your company may follow a different process flow according to its business requirements.

The business manager and Web site designer have designed the company's Internet home page. The page includes a section which will display a single targeted Web offer to customers visiting the site. The contents of this section will require a managed contribution and approval process to produce accurate and timely display of product offers.

First the application developer makes an Offer business component that is content-enabled and defines the Web Offer content type. Then he works with the business manager to develop some personalization rules to target the Web offers, tests the home page, and deploys the home page to the production environment.

The business manager is concerned that the graphics contained in various Web offers may clash with the company logo, so she edits the single approval workflow for the Web Offer content type. She creates an additional approval step for the site designer position, and associates the appropriate contributor and approver positions to those steps in the approval workflow.

Next, she configures the publication workflow, setting the connect string for the server in the production environment.

She then sets up the content project, adding the content items that make up tasks required to create the Web offer. These will be routed to the Content Inboxes of the content contributors and approvers as set up in the approval workflow.

After the content items have been completed and approved, she publishes the project to the production environment.

## Process of Setting Up and Using Content Center

This example process represents the tasks that are carried out in the [“Scenario for Using Content Center” on page 15](#). Typically [Step 1](#) to [Step 6](#) are carried out once and [Step 7](#) to [Step 9](#) are carried out many times.

- 1 [“Setting Up a Content Staging Environment” on page 17](#)
- 2 [“Configuring Content Objects for Content Center” on page 19](#)
- 3 [“Setting Up Content Center Approval Workflows” on page 22](#)
- 4 [“Setting Up Content Center Publication Workflows” on page 25](#)
- 5 [“Setting Up Content Types” on page 27](#)
- 6 [“Setting Up Contributors and Approvers” on page 28](#)
- 7 [“Creating Content Projects” on page 28](#)
- 8 [“Contributing and Approving Content \(End User\)” on page 30](#)
- 9 [“Publishing Content Projects” on page 31](#)



Figure 1 illustrates the process and indicates who might typically perform each task.

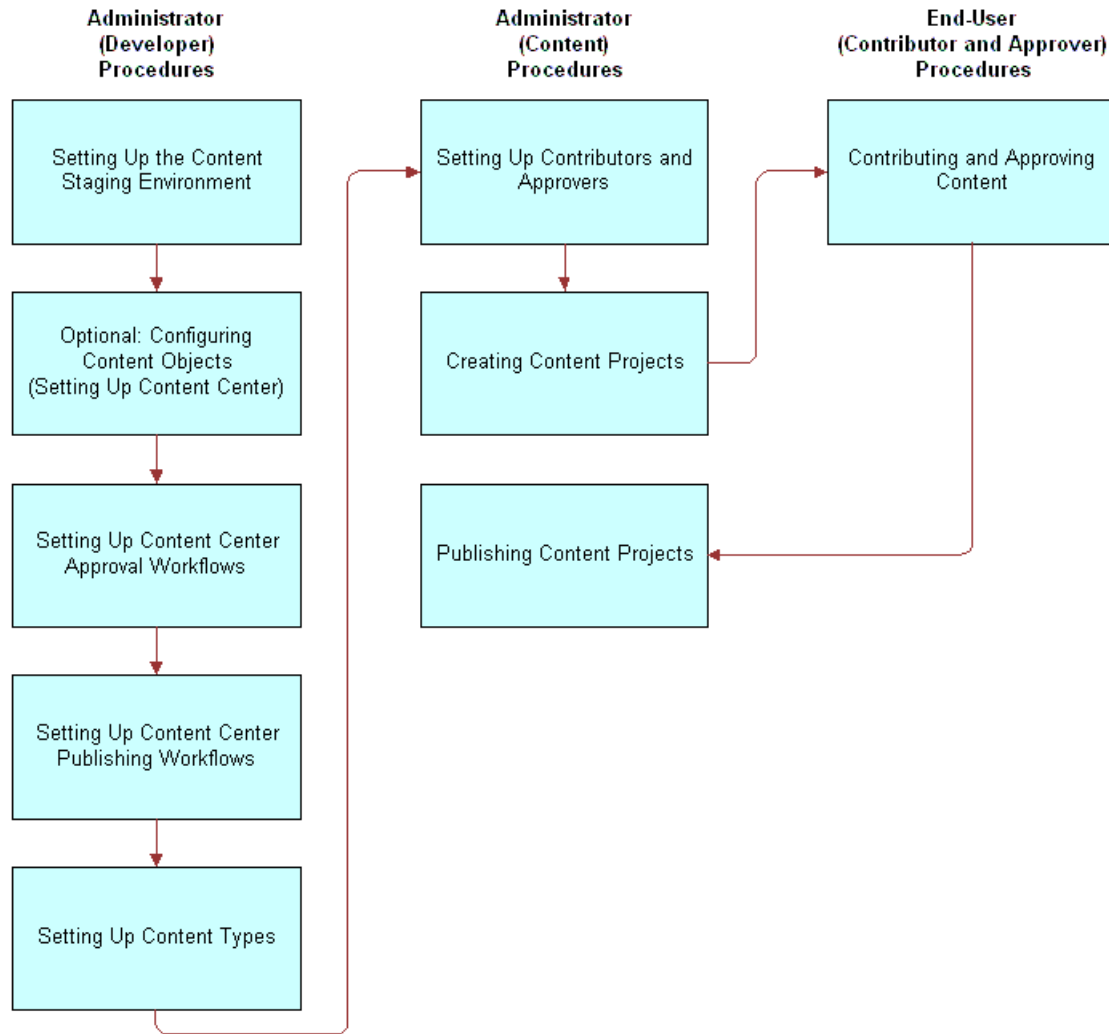


Figure 1. Example Process for Setting Up and Using Content Center

## Setting Up a Content Staging Environment

A content staging environment is similar to a test environment, except that you use it to test content rather than application configuration. This allows you to develop and test new content without affecting your production applications.

After content is approved, Content Center uses workflows and the Content Project business service to send it to the production environment. For general information about Siebel workflows, see *Siebel Business Process Designer Administration Guide*.

### Required Components for a Content Staging Environment

Content Center requires a separate Siebel Business Applications installation for your content staging environment. The physical hardware for this environment should be the appropriate size for supporting the number of content center administrators, contributors, and approvers who manage your business content.

For more information about installing Siebel Business Applications, see the *Siebel Installation Guide* for the operating system you are using.

Your staging environment should contain the following components:

- Database
- Siebel Gateway Name Server
- Siebel Server
- File System
- Web Server and Siebel Web Extension

### Maintaining Consistency Between Staging and Production Environments

It is important that the staging and production environments are consistent when Content Center is implemented.

The most important element to keep synchronized is the Siebel repository (SRF) file. This file defines the structure of the application data, for example, the business components and the integration objects.

Keeping the data synchronized is not relevant, with the exception of *content* and related data. For example, if you use Content Center to manage product literature, then Content Center synchronizes the content by publishing it from staging to the production environment. In this case, products could be related data that also need to be kept synchronized. Although you may have chosen not to manage products through Content Center, nevertheless you must have a user key, such as product ID, that exists in both the staging and production environments so that the association of a piece of literature to a product can be made in the staging area and reproduced in the production environment.

The following are some tips to help you maintain consistency between your staging and production environments.

- If your production environment has not yet been installed, the database administrator should install two separate database instances (one for staging and one for production) using an identical Siebel repository (SRF) file, and initialize both instances with the same seed data. This makes sure that the content object definitions in your staging and production environments are the same.

For more information, see the *Siebel Installation Guide* for the operating system you are using.

- If your production environment is already active, the database administrator should install the staging environment using the same Siebel repository (SRF) file as used for the production environment. Make a copy of your database and use the copy to initialize your staging environment.
- Because you perform most or all content administration tasks in your staging environment, you should either disable or limit access to the appropriate content administration views in your production environment. This helps prevent administrators from accidentally making updates in the production environment.

## Configuring Content Objects for Content Center

The content object definition specifies the information that is transferred from the staging environment to the production environment when the content is published.

Content objects are based on business objects and integration objects. Siebel Systems provides some prebuilt content objects which you can use, or configure to meet your business needs. See [Appendix A, “Content Center Reference”](#) for details about the prebuilt content object definitions.

You use content objects to create one or several content types. Each content type is based on a content object, and is associated with an approval workflow and a group of contributors and approvers. For example, from the Product content object, you might create two different content types: Software Products and Hardware Products. These two content types may have different approval workflows, as well as different contributors and approvers. For more information, see [“Setting Up Content Types” on page 27](#).

### *To set up content objects*

- 1 Use Siebel Tools to identify or define the business object on which you base the content object. For more information on configuring business objects, see *Configuring Siebel Business Applications*.
- 2 Modify the business components to meet the content object requirements. For instructions, see [“Modifying Business Components for Content Center” on page 19](#).
- 3 Use the Integration Object Builder wizard in Siebel Tools to create an integration object. For instructions, see [“Creating Integration Objects for Content Center” on page 21](#).
- 4 Modify the integration object to meet the content object requirements. For instructions, see [“Modifying Integration Objects for Content Center” on page 22](#).

**NOTE:** You do not need to create content objects for content assets. These are provided with the preconfigured product.

## Modifying Business Components for Content Center

**NOTE:** This step is potentially recursive. Complete this step before using the Integration Object Builder wizard in Siebel Tools to create integration objects.

After you have identified or defined the business object on which your content object is based, check its business components for underlying tables that contain foreign keys to other tables. If there are business components with foreign keys, you must modify them to assure the integrity of foreign keys when these objects are published.

Typically, you need to follow one of the following two processes to modify the business components.

***To modify the business components containing foreign keys***

- 1 Create a join in the business component from each foreign key column to the row\_id of the foreign key's table.
- 2 Create fields in the business component for all user key columns in the foreign key's table. If any of these columns are foreign keys, repeat [Step 1](#).
- 3 Assign a PickList and fill the PickMap with the foreign key and all related user key fields, including any intermediate foreign key fields.
- 4 Add Pick Map UpdOnlyIfNull columns for each Id type column in the Pick Map.

The UpdOnlyIfNull column should be the same one as its parent on the Pick Map.

Or, if the business component table contains a foreign key to a child (or other descendent) object in the business object, complete the following process.

***To modify the business components where the business component table contains a foreign key to a child object***

- 1 Create a Multi Value Link to the business component on the foreign key table.
- 2 Include the entire foreign user key as multi-value fields. Expand foreign keys in the user key by joining and adding fields to the Multi Value Link business component.
- 3 Set the Primary Id field of the Multi Value Link to the foreign Key column.

**NOTE:** To resolve foreign keys to child (descendent) objects in the correct order, you must specify a sequence number and XML sequence number for the resulting integration object.

If two business components joined by a foreign key contain user key columns of the same name, create different field names for each user key column. [Table 3](#) shows an example.

Table 3. Example: How to Handle Identical User Key Column Names

| Business Component          | User Key Columns | Comments  |
|-----------------------------|------------------|---|
| Internal Product Sales Tool | BU_ID            | This is a foreign key from the Internal Product Sales Tool business component to the Organization business component.   |
|                             | NAME             | <p>This is a _U1 user key column in the Internal Product Sales Tool business component.</p> <p>This user key column name is identical to the one in the Organization business component described below.</p> <p>In the Internal Product Sales Tool, create a field called Name to map to this column.</p>           |
| Organization                | NAME             | <p>This is a user key column in the Organization business component.</p> <p>This user key column name is identical to the one in the Internal Product Sales Tool business component described above.</p> <p>In the Internal Product Sales Tool, create a field called Organization Name to join to this column.</p> |

**NOTE:** Later, you disable all other user keys, so you only need to check for duplicate names in your business component's \_U1 table user key.

## Creating Integration Objects for Content Center

Integration objects are sometimes called EAI objects, because they use Enterprise Application Integration (EAI) technology. You use the Integration Object Builder wizard in Siebel Tools to create integration objects. For more information, see *Integration Platform Technologies: Siebel Enterprise Application Integration*.

### To create an integration object

- 1 In Siebel Tools, select File > New Object.
- 2 From the dialog box, select Integration Object.

The Integration Object Builder wizard guides you through the process of setting up an integration object.

After you create the integration object, you need to modify it to meet the requirements for a content object. For instructions, see [“Modifying Integration Objects for Content Center” on page 22](#).

## Modifying Integration Objects for Content Center

Use the following guidelines to modify integration objects to meet content object requirements.

### *To modify integration objects*

- In the integration object, make sure that the link that defines the parent to child relationships allows update and delete. If the link does not allow those operations, replace it with a link that does.
- In the integration object user properties, add AdminMode, value Y. This gives the EAI Siebel Adapter permissions to do synchronization against a Siebel database.
  - Disable these types of integration components:
    - ❑ All integration components created from Multi-Value Link (MVL) components, unless your business requires that you transfer those multi-values to your production environment.
    - ❑ If more than one field is mapped to a table column, all fields except one.
    - ❑ For integration components that have file attachments, the field that stores the file revision number. For example, in the Admin Sales Tool integration component, disable the LitFileRev field.
  - In the integration component, disable:
    - ❑ All calculated fields.
    - ❑ The NoDelete, NoInsert, and NoUpdate user properties.
    - ❑ All user keys except the one that is based on the \_U1 table user key, which is used for integration between the two Siebel databases.
    - ❑ All identification (Id) fields. (Make sure that each field is listed in the Pick Map UpdOnlyIfNull list of its entry in the pickmap for the user key of its join table.)

## Setting Up Content Center Approval Workflows

You can use Siebel Business Process Designer to manage workflows for the content item approval process. When the Start Project or Request Start Project action is invoked on a content project, the approval workflows associated with each content item in the project are instantiated.

Approval workflows allow you to specify the structure for contributing, reviewing, and approving content. The designated contributors and approvers are notified by new records in their Content Inbox at the appropriate step in the content production and approval process. For more information about designating contributors and approvers, see [“Setting Up Content Types” on page 27](#).

A state model and some workflows are associated with the approval workflow included in the seed data that is provided in Siebel applications. You can use these processes in your deployment, modify them to meet the needs of your business, or use them as a guide for creating your own approval workflows.

For more information on creating or modifying workflows, see *Siebel Business Process Framework: Workflow Guide*.

**NOTE:** All Content Center workflows should be placed into the Content Center group.

## About the Content Item State Model

A state model, called Content Item Status, controls the status changes of a content item.

Table 4 describes each of the content item states.

Table 4. Content Item Status

| State            | Description  |
|------------------|--|
| Pending Submit   | Applied by the workflow process.<br><br>If the current task in the workflow is a Contribute task, the workflow process applies the Pending Submit state to indicate that an end user is expected to perform some action on the content item. |
| Submitted        | Applied by an end user.<br><br>A content contributor applies the Submitted state to indicate that the actions associated with this content item have been completed.   |
| Pending Approval | Applied by the workflow process.<br><br>If the current task in the workflow is an Approval task, the workflow process applies the Pending Approval state to indicate that an end user is expected to review the content item.                |
| Approved         | Applied by an end user.<br><br>A content approver applies the Approved state to indicate that the content item has been reviewed and approved.   |
| Rejected         | Applied by an end user.<br><br>A content approver applies the Rejected state to indicate that the content item has been reviewed and disapproved.  |

Table 4. Content Item Status

| State     | Description   |
|-----------|---|
| Canceled  | Applied by an end user.<br><br>A content contributor or approver applies the Canceled state to indicate that the content item should no longer be included in the current content project.  |
| Completed | Applied by the workflow process.<br><br>This is a terminal state that indicates that the workflow approval process has been completed for the content item. A content item must be in the Completed state before it can be published. |

## About the Content Approval (Single Approver) Workflow

The Content Approval (Single Approver) workflow is a simple workflow that demonstrates a single approver approval process. You can use this workflow with or without modification.

The Content Approval (Single Approver) workflow uses these step types to construct the business logic for content item approval:

- **Content Task Subprocess.** This step type is used to indicate that the Content task assigns the content item to an end user to perform some action. Each Content task has a type and a sequence number. The task type is either contribution or approval. The task sequence indicates the Siebel position to which the content item should be assigned, as specified on the content item. This step calls the Content task workflow subprocess. For more details about the subprocess, see [“About the Content Task Subprocess” on page 24](#).
- **State Decision Point.** This step type performs branching logic in the approval process. The branching logic is based on the state that is applied to the content item after a Content task. For example, a decision point is used to reassign a content item to the originator after it is rejected.
- **State Update Siebel Operations.** This step type is used to make updates to the content item state.

You can use these workflow components to create new approval workflows or to modify the Content Approval (Single Approver) workflow for your business. For example, if you require two approval tasks, you can add two Content Task Subprocesses and State Decision Points.

## About the Content Task Subprocess

The Content Task Subprocess contains the common logic of assigning a content item and waiting for a user action. The parent approval process calls this subprocess each time a content item is assigned to an end user. Calling this task causes the content item to appear in the Content Inboxes for those users associated with the current sequence (TaskSeq).



The parent business process must pass in the input arguments shown in [Table 5](#).

Table 5. Parent Approval Process Input Arguments

| Input Argument | Description  |
|----------------|--|
| Object Id      | The content item ID from the parent (Content Approval) to the child (Content Task) Subprocess. |
| TaskSeq        | Passes the sequence number of the current task.  |
| TaskType       | Indicates that the current task is either type Contribute or type Approve.                     |

The Content Task Subprocess performs these actions:

- Sets the content item state to either Pending Submit or Pending Approve, depending on the TaskType for the current task.
- Sets the content item Current Approval Sequence Number field to the TaskSeq value. This makes the content item visible to the appropriate end users in the Content Inbox view.
- Waits for the end user to take action on the content item and make a state change to the item. When this occurs, the workflow process resumes and returns control to the parent approval process.

### About the Auto Complete Workflow

An approval workflow must be run for each content item before a content project can be published. (See [“To start the project approval workflow” on page 29](#).) To publish content without routing it through approvers and contributors, use the Auto Complete workflow. The Auto Complete workflow is a simple workflow, provided with the seed data. It sets the status of a content item to Completed immediately so that the project is ready for publication.

## Setting Up Content Center Publication Workflows

The Content Project business service publishes content projects. It can transfer any data that can be accessed through a business component: both complex database content and unstructured content. Transactional integrity is maintained between all the items in a content project.

Project publishing is controlled by workflows. This provides flexibility in the publishing process. When a business manager invokes either the Publish or Request Publish action for a project, the publication workflow associated with the project is instantiated.

Siebel applications provide two predefined publication workflows in the standard product:

■ Content Publish workflow

This workflow publishes a content project from a staging environment to a production environment. There is only one step in this workflow, which calls the Content Project business service. You may extend this process to meet your specific business requirements. For example, you may create additional workflow steps to integrate with other systems or wait for a specified period of time before publishing.

■ Content Publish to Files workflow

This workflow is similar to the Content Publish workflow, except that the content project is published to XML files in a specified directory instead of to the production environment.

You can use these processes in your deployment, modify them to meet the needs of your business, or simply use them as a guide for creating your own publication workflows.

For more information on creating or modifying workflows, see *Siebel Business Process Framework: Workflow Guide*.

**NOTE:** All Content Center workflows should be placed into the Content Center group.

## About the Content Project Business Service

The Content Project business service is designed to publish a content project from the staging environment to the production environment or to publish the content items as XML files. In the publication workflow, the Export method of this business service is called, indicating that the content items in the project will be exported from the staging environment. The publishing target is set using two method arguments, specified as workflow properties:

■ **Connect String.** A Siebel connect string, specified as:

`si ebel : //namesrvr: 2321/enterpri se/obj mgr`

For example: `si ebel : //si qal ab4: 2321/si qal ab4/SCCObj Mgr_enu`

(The exact connect string can be picked up from the `eapps.cfg` of the publishing target server.) The Content Project business service connects to the specified object manager, such as `SCCObjMgr` for Siebel Call Center, as the current user and makes the appropriate updates, inserts, and deletes for each content item in the project. These changes are made by the content object in the sequence specified in Siebel Tools for each content object.

■ **Export Directory.** The name of a file system directory into which the XML should be placed. For example, `C:\temp` or `\\fileserver\publish\export`. The directory must exist and be accessible to the object manager. Specifying this property exports the content items within the project as a series of Siebel XML files. The files use the naming convention:

- Upload *content object name.xml*—for content items that are to be added.
- Delete *content object name.xml*—for content items that are to be deleted in the target system.

**NOTE:** Detailed information about the other methods in this business service are given in [Appendix A, "Content Center Reference."](#)

## Setting Up Content Types

Content types define the business rules for managing a class of content through the creation and approval process.

Each content item is assigned a content type. The content type determines the following for the content item:

- The approval workflows.
- Which views are used to preview or edit the content.

A set of predefined content types are provided. You can also create new content types according to your business process, as described in the following procedure.

**NOTE:** Do not confuse *content types* with *content asset types*. For information about content asset types, see [“About the Content Asset Types View” on page 40](#).

### To set up content types

- 1 Navigate to the Administration - Content Center screen > Content Types view.
- 2 Create a new record and complete the necessary fields.

Some fields are described in the following table.

| Field              | Comments   |
|--------------------|--|
| Name               | Unique name of the content type.   |
| Content Object     | <p>The object chosen from this dialog box specifies the information that is transferred during publishing.</p> <p>For more information, see <a href="#">“Configuring Content Objects for Content Center” on page 19</a>.</p>   |
| Approval Workflow  | Defines the content contribution, review, and approval process for this content type. For more information, see <a href="#">“Setting Up Content Center Approval Workflows” on page 22</a> .  |
| Content Type Views | <p>A list of the views used to administer or preview content of this type. These views determine the end-user navigation from the Content Inbox.</p> <p>Examples are the destination views for the Item Reference hyperlink, in <a href="#">Step 2 in the “To contribute (create or edit) a content item” procedure on page 30</a> and the Action hyperlink in <a href="#">Step 3 in the “To contribute (create or edit) a content item” procedure on page 30</a>.</p> |
| Picklist           | Determines the drop-down list used to select content of this type.   |
| Pick Applet        | Determines the pick applet used to select content of this type.  |

## Setting Up Contributors and Approvers

After you set up approval workflows for content objects, you must specify contributors and approvers for the content.

When you create a content type, you assign default contributors and approvers to each sequence number. If necessary, these defaults can be overridden (Content Item detail view) when the content item is created.

### *To set up a contributor or approver*

- 1 Navigate to the Administration - Content Center screen > Content Types view.
- 2 Select the content type for which you would like to create a list of contributors and approvers.
- 3 Click the Contributors and Approvers view tab.
- 4 In the Contributors and Approvers list, create a new record.
- 5 In the Position field, select a position from the Pick Position dialog box.
- 6 In the Sequence field, specify a sequence number for the selected position.

You can specify multiple positions for the same sequence number. Doing so places the content item into multiple Content Inboxes for this task; however, only one individual is able to complete the task.

- 7 In the Comment field, add a default comment for each position.

Comments are visible to users when they receive the content item in their Content Inbox.

## Creating Content Projects

You can use a Content Project to manage the process of creating, editing, and deleting application content. The Content Project provides a virtual folder through which a set of related content item changes can be managed. You use the Content Projects view to create projects, start the project approval workflows, and review content project status.

### *To create a content project*

- 1 Navigate to the Administration - Content Center screen > Content Projects view.
- 2 In the Content Projects list, create a new record, specifying a name and description.
- 3 In the More Info form fill in the Plan Publication Date field—the date you plan to publish this project.  
  
This date does not automatically publish the project.
- 4 In the Publication Workflow field, select the publication workflow that you want to use for this project.
- 5 Click the Content Items view tab.

- 6 In the Content Items list, create a new record and complete the necessary fields.

For each content item, you must specify a descriptive name, a content type, a description of the work to be performed, and a status (Add, Update, or Delete). If the item has a status of Update or Delete, you can also specify the item reference, which allows you to select the specific piece of content that should be changed.

**NOTE:** You can change any contributors or approvers for a content item by editing the Contributors and Approvers list.

### *To start the project approval workflow*

- 1 Navigate to the Administration - Content Center screen > Content Projects view.
- 2 From the Content Projects list, select the appropriate content project.
- 3 In the More Info form, do one of the following:
  - Click Start Project. This changes the state of the project from Draft to In Process and instantiates the approval workflows synchronously. This means that users must wait for all workflow processes to begin before regaining control of the user interface. For large projects, this could take several minutes.
  - Select Request Start Project from the Menu button drop-down list. This changes the state of the project from Draft to In Process and instantiates the approval workflows asynchronously on a separate server component, which returns control to users more quickly. This is the recommended method to use for projects that contain thirty or more items. This method requires that the Content Project Start server component is online. (See *Siebel System Administration Guide* for information about starting server components.)

**NOTE:** If you add more content items to the project after it is in the In Process state, invoke the Start Project or Request Start Project action again to start the approval workflows for the new content items.

### *To review status of content project and content items*

- 1 Navigate to the Administration - Content Center screen > Content Projects view.
- 2 From the Content Projects list, select the appropriate content project.

The status of the project is given in the More Info form. The following table explains the Project Status values.

| Project Status | Description  |
|----------------|--|
| Draft          | The project has been created and the approval workflow has not been started. |
| In Process     | The approval workflow has been started.                                      |
| Published      | The project has been published.  |

- 3 Click the Content Items view tab.

You can review the status of each content item, and check or change its assignment. By clicking the Item Reference for a content item, you can preview the current state of the content. See [Table 4 on page 23](#) for possible status values.

## Contributing and Approving Content (End User)

The Content Inbox is the screen that Content Contributors and Approvers use to interact with the approval workflow. In the My Content Items view users see any content item currently assigned to their position by the approval workflow, and are able to drill down on hyperlinks to the appropriate views to contribute, edit, preview, and approve content.

### *To contribute (create or edit) a content item*

- 1 Navigate to the Content Inbox screen > My Content Items view.

The Content Items list contains all of the content items currently assigned to you by the approval workflow.

Items that require contribution can be identified by the status Pending Submit.

- 2 Drill down on an item and do any of the following:

- Click the Contributors and Approvers view tab to see the users assigned to the contribution and approval process.
- Click the History view tab to review actions taken on the item to date.
- Drill down on the Item Reference hyperlink to preview the content item.

- 3 Drill down on the Action hyperlink and use the associated administration view to create or edit content.

This link dynamically takes you to the Add/Edit view associated with the content type. If the action is Delete, this link is not active. Instead, completion of a deletion task indicates approval to delete the referenced item.

For more information about editing content assets, see [Chapter 3, "Content Asset Management."](#)

- 4 Return to the Content Inbox using the back button.
- 5 If the content item is an Add action, update the Item Reference field on the content item to reference the content you just created. Clicking the Item Reference pop-up displays a pick list from which you can select the content record that you just created.
- 6 Click on the Item Reference link to view the item and verify that it is complete and accurate. Return to the Content Inbox using the back button.
- 7 Add comments as needed to the content item, and change the status of the item as appropriate. For example, change the status from Pending Submit to Submitted.

***To approve content***

- 1 View all content items in the Content Inbox and select an item to work on.  
Items that require approval can be identified by the status Pending Approval.
- 2 Drill down on an item and do any of the following:
  - Click the Contributors and Approvers view tab to see the positions assigned to the contribution and approval process.
  - Click the History view tab to review actions taken on the item to date.
  - Drill down on Item Reference hyperlink to preview the content item.
- 3 Make any comments to the content item, and change the status of the item as appropriate.  
For example, change the status from Pending Approval to Approved or Rejected.

## Publishing Content Projects

After the content for a project has been added and approved, use the Content Center publication workflow to publish to your production environment.

Make sure that:

- The correct publication workflow for the project has been specified. (See [Step 4 in the “To create a content project” procedure on page 28.](#))
- The status of the project is In Process and the status of each item in the project is Completed.

***To publish a content project***

- 1 Navigate to the Administration - Content Center screen > Content Projects view.
- 2 From the Content Projects list, select the appropriate content project.
- 3 Do one of the following:
  - Click Publish. This changes the state of the project to Published and instantiates the publication workflow synchronously. This means that users must wait for all workflow processes to begin before regaining control of the user interface. For large projects, this could take several minutes.
  - Select Request Publish from the Menu button drop-down list. This instantiates the publication workflow asynchronously on a separate server component, which returns control to users more quickly. This is the recommended method to use for projects that contain thirty or more items. This method requires that the Content Project Publish server component is online. (See *Siebel System Administration Guide* for information about starting server components.)
- 4 If you selected Request Publish in [Step 3](#):
  - a Navigate to the Administration - Server Management screen > Components view.

- b** In the Components list, select the Content Project Publish record, and check the State field in the Tasks list.

If publication fails, the task's state is "Exit with Error."

**NOTE:** A content project cannot be republished, except by creating a new content project, for example by copying the published project.



# 3

## Content Asset Management

This chapter describes setting up, creating, and managing content assets. It includes the following topics:

- ["About Content Assets" on page 33](#)
- ["Scenario for Content Asset Management" on page 33](#)
- ["Process of Managing Content Assets" on page 34](#)
  - ["Defining Content Sets to Contain Content Assets" on page 34](#)
  - ["Adding Content Assets to a Content Set" on page 35](#)
  - ["Setting the Home Page for a Content Set" on page 36](#)
  - ["Viewing and Editing Content Asset Properties" on page 37](#)
  - ["Checking Content Assets In and Out" on page 38](#)
  - ["Editing HTML Content" on page 40](#)
- ["About the Content Asset Types View" on page 40](#)
- ["About Configuring Content Asset Management" on page 40](#)

You can use the content asset repository for storing and managing unstructured content such as assets and sets of assets. Content Asset Management establishes check-out and check-in procedures to serialize access to content, and prevent changes from being lost by users trying to update content simultaneously. Content can be rolled back to earlier versions if the changes made were unsatisfactory.

### About Content Assets

You can use the content asset repository for storing and managing unstructured content as assets and sets of assets. Content assets are typically unstructured data such as Web pages, images, Microsoft Office documents, and text files.

Content Asset Management establishes check-out and check-in procedures to serialize access to content, and prevent changes from being lost by users trying to update content simultaneously. Content can be rolled back to earlier versions if the changes made were unsatisfactory.

### Scenario for Content Asset Management

Content Asset Management is typically used in conjunction with other screens in the Siebel Business Application, for example Microsite Management, Group News, and Info Center. For a sample scenario where Content Asset Management is used, see ["Scenario for Microsite Management" on page 47](#).

## Process of Managing Content Assets

This example process represents the typical tasks for creating and managing content assets:

- [“Defining Content Sets to Contain Content Assets” on page 34](#)
- [“Adding Content Assets to a Content Set” on page 35](#)
- [“Setting the Home Page for a Content Set” on page 36](#)
- [“Viewing and Editing Content Asset Properties” on page 37](#)
- [“Checking Content Assets In and Out” on page 38](#)
- [“Editing HTML Content” on page 40](#)

## Defining Content Sets to Contain Content Assets

Content sets are collections of content assets. Every content asset must belong to a content set and should have a unique name within that set. In addition to content assets, content sets can contain other content sets.

After a content set is defined, you can:

- Add content assets to the set.
- Add other content sets to it.
- Preview the home page asset of the set.
- Review the history of the set.
- Establish the locks on content assets in the set.

This task is a step in [“Process of Managing Content Assets” on page 34](#).

### *To create a content set*

- 1 Navigate to the Administration - Content Center screen > Content Sets view.
- 2 In the Content Sets list, create a new record and complete the necessary fields.

Some fields are described in the following table.

| Field       | Comments                                       |
|-------------|--|
| Name        | A unique name for the content set record.      |
| Title       | A short descriptive title for the content set. |
| Description | Text describing the content set.               |

| Field     | Comments  |
|-----------|---|
| Home Page | This field cannot be filled in until there are content assets in the content set. See <a href="#">"Setting the Home Page for a Content Set" on page 36.</a> |
| Parent    | The name of an existing content set that contains this new content set.   |

## Adding Content Assets to a Content Set

Content assets can only be created as child records of a content set.

This task is a step in ["Process of Managing Content Assets" on page 34.](#)

### *To add content assets to a content set*

- 1 Navigate to the Administration - Content Center screen > Content Sets view.
- 2 In the Content Sets list, select the content set to which you want to add an asset.
- 3 Click Add Content.
- 4 Do either of the following actions:
  - Click the File Options button and specify a local file.
  - Type in a URL or network path.
- 5 If you typed in a URL or network path, click the URL Options button and set the URL and network file options in the dialog box.

Some fields are described in the following table.

| Field                    | Comments  |
|--------------------------|---|
| Follow Links             | Select to have the pages that are linked-to from the specified Web page are copied, and, in turn, links to those pages copied as well.  |
| Max Depth                | Indicates the level to which links are copied. For example, if Max Depth = 1, pages that are linked-to from the specified page are copied, but not pages that they link to.   |
| Restrict to Subdirectory | Select so that, if links are followed, only links to pages within the same directory as the specified page are copied.  |
| Retrieve Graphics        | Select to have graphics on the specified Web page copied along with the text.   |
| Preserve Path            | When a secondary file is imported (using Follow Links or Wildcard subdirectories), this option retains the path hierarchy in the asset's name. For example, if the linked file /img/foo.jpg is imported, and this option is selected, the asset will be named img/foo.jpg. If this option is not selected, the asset will be named foo.jpg. |
| <b>URL options</b>       |   |

| Field                            | Comments   |
|----------------------------------|--|
| Absolute External Links          | When importing content for any external links, each path will be converted to absolute path.   |
| <b>Network file options</b>      |  |
| Get all Files under Subdirectory | When importing content from a network path, imports all files under the current subdirectory.  |
| Replace Files Only if Newer      | When importing content, replaces the files in Content Center only if the file being imported is newer than the file already in Content Center. |

- 6 (Optional) Click Advanced to set the Advanced Options for the asset.

Some fields are described in the following table.

| Field              | Comments   |
|--------------------|--|
| Content Asset Type | Leave this field set to Auto-Detect (the default) to have the application determine the asset type, or select a type from the dialog box to set a specific type. |
| Path Prefix        | Put the specified path prefix to any external link in the content.   |
| Lock               | Select this to lock the content asset, so that others cannot edit it.  |
| Comments           | Enter comments for this version of the content asset.  |

## Setting the Home Page for a Content Set

After adding content assets to the content set, you can specify one of these assets to be the home page. The home-page asset displays when the content set is previewed. Because links on the preview applet are active, if the content set contains a portal-style HTML page, this is the best page to choose as the home-page asset.

This task is a step in [“Process of Managing Content Assets” on page 34](#).

### *To set the home page for a content set*

- 1 Navigate to the Administration - Content Center screen > Content Sets view.
- 2 In the Content Sets list, select the content set and complete the Home Page field.
- 3 Click the Preview view tab to see the home page.

# Viewing and Editing Content Asset Properties

The following procedure describes the fields in the Content Assets view and use of the Preview, Links, Referenced by, Versions, and Access Groups views.

This task is a step in [“Process of Managing Content Assets” on page 34.](#)

## *To review and edit the properties of a content asset record*

- 1 Navigate to the Administration - Content Center screen > Content Sets view, and select the content set that contains the content asset.
- 2 In the Assets view, drill down on the content asset name.

**NOTE:** You can also navigate to a particular content asset record by querying in the Content Assets view or by clicking on the asset-name hyperlinks on the Content Explorer.

- 3 Complete or edit the fields as required.

Some fields are described in the following table.

| Field        | Comments   |
|--------------|--|
| Name         | A name for the content asset record. The name should be unique within in the content set.  |
| Title        | A descriptive title for the content asset.   |
| Activation   | Sets the activation date for the content asset.<br><br>There is no logic associated with this date in the Content Center module, but when this content is used by other modules, such as Microsite Management, these dates are used to determine whether the content is displayed. |
| Expiration   | Sets the expiration date for the content asset.<br><br>There is no logic associated with this date in the Content Center module, but when this content is used by other modules, such as Microsite Management, these dates are used to determine whether the content is displayed. |
| Content Type | This field is set when the content asset is created and cannot be modified.  |
| Private      | If a content asset is private, only users on the associated access groups can view the asset. If this box is not selected, the asset is public and any user can view the asset, regardless of any access groups specified for the asset.   |

- 4 Click Edit HTML to edit content assets of type HTML directly within the Siebel application. For more information, see [“Editing HTML Content” on page 40.](#)

- 5 Click the Preview view tab to preview the content asset.

If the content asset is an HTML file or an image, the asset displays directly in the Preview applet. For other types of content assets, the title of the asset appears as a hyperlink, from which you can open the asset in the application that you choose.

- 6 Click the Links view tab to review the links within a content asset.

These may be links to graphics, to HTML pages, or to email addresses. They may be external links or they may be links to other assets within the content asset repository (internal).

If the link is internal, Content Center checks whether the link is valid.

- 7 Click the Referenced by view tab to review the other content assets that contain links to this content asset.

- 8 Click the Versions view tab to view information about the versions of the asset stored in the content asset repository.

| To...                           | Select It and Click... |
|---------------------------------|------------------------|
| Roll back to a previous version | Restore                |
| Download a version to file      | Save to File           |
| Preview a version               | Preview                |

- 9 Click the Access Groups view tab to view who has read and write access to the content asset:

- **Read access.** If the Private check box was selected in the Asset form above the Access Groups view, only those groups listed have read access. If the Private check box was not selected, there are no restrictions on who has read access to the asset.
- **Write access.** If any access groups have the Allow to Edit check box selected, only they have write access. If the Allow to Edit check box is clear for all, there are no write restrictions on the asset.

For information about creating access groups, see *Siebel Security Guide*.

## Checking Content Assets In and Out

Checking out a content asset downloads the asset file and locks the asset so that others cannot make changes to it.

Checking in a content asset uploads a new version of the content asset and unlocks the asset.

This task is a step in ["Process of Managing Content Assets" on page 34](#).

### To check out a content asset

- 1 Navigate to the Administration - Content Center screen > Content Sets view, and select the content-asset record to check out.

2 Click Check Out.

The file is saved locally for editing, other users cannot modify the file until it is checked in, and your user ID appears in the Locked by field.

### *To check in a content asset*

- 1 Navigate to the Administration - Content Center screen > Content Sets view, and select the content-asset record to check in.
- 2 Click Check In.
- 3 The Check In Content dialog box appears.
- 4 Do either of the following actions:

- Click the File Options button and specify a local file.
- Type in a URL or network path.

- 5 If you typed in a URL or network path, click the URL Options button and set the URL and network file options in the dialog box.

Some fields are described in the table in [Step 5 in the “To add content assets to a content set” procedure on page 35](#).

- 6 (Optional) Click Advanced to set the Advanced Options for the asset.

Some fields are described in the table in [Step 6 in the “To add content assets to a content set” procedure on page 36](#).

## About the Content Asset Commands on the Menu Button

Most users only need to use the Check Out and Check In buttons. However, other content asset commands are available on the menu button of the Asset Detail form in the Content Assets view:

- **Lock.** Locks the content asset by the current user.
- **Unlock.** Unlocks the content asset. For example, you can use this command if you check out an asset, but then decide that you do not want to make any changes to it.
- **Save to File.** Downloads the content asset to a file, but does not lock the asset.
- **Replace.** Creates a new version of the content asset. The Replace command is available only when the asset is locked.
- **Copy.** Copies the content asset. This gives you two content asset records that are the same.
- **Delete.** Deletes the content asset record and is equivalent to the Delete Record command. This soft delete keeps past versions of the asset in the content asset repository. Deleted assets can be accessed through the Contents Sets History view.

## Editing HTML Content

You can edit content assets of type HTML directly within the Siebel application using the integrated HTML editor.

**NOTE:** To edit large or complex HTML files, you may prefer to use a third-party HTML or text editing application.

This task is a step in [“Process of Managing Content Assets”](#) on page 34.

### *To edit HTML content using the integrated HTML editor*

**1** Navigate to the Administration - Content Center screen > Content Sets view, and select an HTML content-asset record to edit.

**2** Click Edit HTML.

The content asset is automatically checked out, and the integrated HTML editor opens.

**3** Click the edit area, and make changes as required.

For general information about the integrated HTML editor, see *Siebel Fundamentals*.

**4** Click Save.

The content asset is automatically checked in.

## About the Content Asset Types View

The Content Asset Types view contains the file types, and associated DTR (document type rules) files, extensions, and MIME types, that are recognized by Content Asset Management.

Although you can add new content asset types if necessary, it is unlikely that you will need to. Many file types are provided with the preconfigured Siebel application.

**CAUTION:** It is recommended that you do not edit or delete records in this view and that you do not delete any DTR files from your Siebel installation.

## About Configuring Content Asset Management

Content assets can be added to the Content Center repository by specifying a filename on a shared directory or by specifying a URL. In both cases, files that are linked-to from the specified file or URL can be imported by selecting to Follow Links.

When shared network files are imported to the Content Center repository in this way, the permissions for the directory access are those of the server process account. Because the server process account typically has more extensive privileges than the user, there is a security risk of users importing content from directories to which they do not have access.



To prevent this, importing from shared directories has been disabled except for those directories that are listed in the contentbase.ini file. It is recommended that you limit this list of allowed directories to a set that you can easily monitor and manage.

On the Windows platform, the contentbase.ini file can be found in *SI EBEL\_ROOT\si ebsrvr\bin*, and, on the UNIX platform, the file can be found in *SI EBEL\_ROOT/si ebsrvr/lib*. The default file looks like this:

```
[Global Settings]

ImportFileEnabled=1

ImportFilePath=Siebel ContentShare
```

■ **ImportFileEnabled.** If ImportFileEnabled=1, file import is allowed from directories identified in the ImportFilePath parameter. If ImportFileEnabled=0 import is allowed only from URLs (where the URL's server enforces security) and import from shared directories and followed links is disabled.

■ **ImportFilePath.** The value of this parameter determines the directories from which the user can import files. This value is a string of subpath names, delimited by semicolons. The directory specified by the user for file import must contain one of the subpaths listed.

For example, if the ImportFilePath parameter is set to *Siebel ContentShare; EngShare; \\ori on; sales\content*, users can import files from the following directories:

```
\\myPC\Siebel ContentShare
\\ServerA\EngShare\GroupWeb
\\ori on\users\NewsBulletin
```

However, you cannot import files from the following directories:

```
\\myPC\Siebel ContentShareAll
\\ServerA\Mysales\content
```

**NOTE:** The network path is interpreted relative to the server machine, not the client machine. Therefore, local paths like *C:\* refer to directories on the server machine. And, for example, if the server machine is running UNIX, then the UNC path syntax *\\ori on\users\* is not valid; instead, it might be */net/ori on/users/*.

If you use the default (out-of-the-box) contentbase.ini file, the administrator or individual users need to set up one or more shared directories named *SiebelContentShare* to contain those files (and those files that are referenced by the specified files) that they want to import as content assets.

■ **Downloading.**

```
[Download As Attachment]

application/zip=TRUE

video/avi=TRUE
```

When downloading some file types, Internet Explorer looks at the extension .swe and is not able to invoke the correct application even though the Content Type headers being passed to Internet Explorer are correct. Set the values of those MIME types here as true. The name/ext in the Internet Explorer pop-up will show up correctly.

# 4

## Microsite Management

This chapter describes how to use Microsite Management to create Web pages and manage Web page content.

It includes the following topics:

- ["About Microsite Management" on page 43](#)
- ["Scenario for Microsite Management" on page 47](#)
- ["Process of Microsite Management" on page 48](#)
- ["Viewing and Editing Page Information" on page 48](#)
- ["Using the Page Designer and Its Tools" on page 51](#)
- ["Managing Groups of Page Items" on page 66](#)
- ["Previewing a Page" on page 66](#)
- ["Publishing a Page" on page 67](#)
- ["Deleting a Page" on page 68](#)
- ["Creating and Applying Templates" on page 68](#)
- ["About Creating Search Indexes" on page 70](#)
- ["About Configuring Microsite Management" on page 70](#)

## About Microsite Management

Many companies have multiple content managers whose responsibilities include adding and modifying data on Web pages. The layout and maintenance of data and hypertext links must be done as efficiently as possible, without requiring IT resources. The Microsite Management module is designed to simplify creation and maintenance of Web pages. Everything from site organization and creation of new pages through to editing text and graphics is carried out from the Microsite Management screen.

### Unstructured and Structured Content Definitions

Both structured and unstructured *page items* can be included on pages created within the Microsite Management module:

- **Unstructured Content.** Such as HTML files, graphics, and links to documents. Unstructured content can be authored in a variety of environments, including Microsoft FrontPage, PowerPoint, and Word and the integrated HTML editor within the Siebel applications. Placement of unstructured content on pages is carried out using Page Designer in the Microsite Manager screen.

- **Structured Content.** Such as product catalogs and lists of opportunities. In general, structured content is authored in the Siebel application environment. Placement of structured content on pages is carried out in Siebel Tools, by editing applets on views.

### Key Features

Key features of Microsite Management are:

- **Page Administrator Explorer Tree.** Gives a hierarchically organized view of all the pages in your Web site.
- **Page Designer.** A graphical drag-and-drop page layout tool that allows page designers and content managers to create different types of content anywhere on a page.
- **Preview.** Allows you to preview pages according to content status (for example, approved or draft) and according to release and expiration dates.
- **Templates.** Grouped page items (unstructured items) that can be placed on multiple pages and updated for all pages at once.
- **Access Control.** Is set at both the page and page item level so you can control which access groups can see and edit content.
- **Transparent Integration with Content Center.** Allows setting up and routing the tasks of creating, editing, and approving with Siebel Content Center. When a link to a file is added to a page, that file is added to the Siebel content repository as a content asset, and can be version-controlled with Content Center. For more information, see [Chapter 2, "Content Center."](#)
- **One-Click Publishing.** Publishes directly from the Microsite Management screen, creating a content project and automatically approving the page content.
- **Usage Collection.** Ability to monitor users' visits to microsite pages. For more information, see [Chapter 5, "Usage Collection."](#)

## The Page Designer and the Finished Page

Figure 2 and Figure 4 show the relationship between a finished page and Microsite Management's Page Designer layout tool that was used to create the page. The content on the page is indicated by page item icons in Page Designer. The areas of the page, such as the navigation bar, are indicated schematically in Page Designer.

The screenshot displays a web page titled "PCS Employee Benefits". On the left is a vertical navigation menu with links such as "Human Resources Home", "Holiday Schedule", "Expense Reports", and "Benefits". The main content area has a header image showing a group of people with the word "IMMIGRATION" overlaid. Below the header is a table with two columns: "Benefits Programs" and "Type". The table lists several links with corresponding icons. On the right side, there is a "Quick Picks" section with a list of additional links.

| Benefits Programs                               | Type |
|---|------|
| <a href="#">Frequently Asked Questions</a>      |      |
| <a href="#">Compensation Programs</a>           |      |
| <a href="#">Day Care and Other PCS Services</a> |      |
| <a href="#">Managers Resource Guide</a>         |      |

| Guidelines and Services                               | Type |
|---|------|
| <a href="#">Relocation Guidelines (Word document)</a> |      |
| <a href="#">HR Contact Information</a>                |      |
| <a href="#">401k Allocation</a>                       |      |
| <a href="#">Health and Dental Providers</a>           |      |
| <a href="#">Family Services</a>                       |      |
| <a href="#">Employee Awards</a>                       |      |

**Quick Picks**

- [HR Key Contacts](#)
- [Careers at PCS](#)
- [Employee Referral Program](#)
- [Department Numbers](#)
- [Business Cards and Nameplates](#)
- [Conferencing Services](#)
- [HR Forms](#)
- [Employee Rewards Nominations](#)
- [Health and Safety](#)
- [Single Sign-On Links](#)
- [MyYahoo](#)
- [Authoria - Benefits Eligibility](#)

Figure 2. Microsite Page

If you prefer, you can revert to the older style of navigation bar (shown in [Figure 3](#)). See [“Changing the Navigation Bar Style in Microsite Pages” on page 73](#).



Figure 3. Older Style Navigation Bar with Blue Border

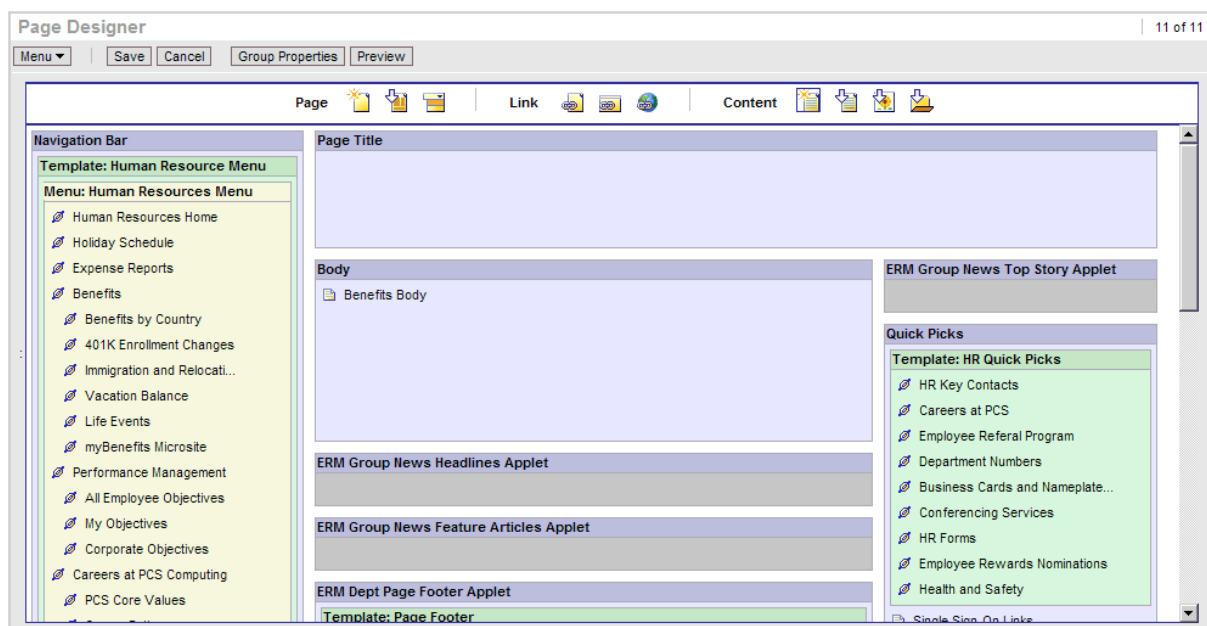


Figure 4. The Page Layout Schematic of the Microsite Page in Page Designer

### About Microsite Management and Standard Activity Mode

Microsite pages can be viewed in both standard and high interactivity mode. But, high interactivity mode is required to create and administer microsite pages.

# Scenario for Microsite Management

These scenarios provide an example of microsite management tasks performed by the microsite owner and a content author for the microsite. Your company may follow a different process according to its business requirements.

## Standard Microsite Management Scenario

The microsite owner for the analyst relations group of a large company has been asked to develop a new microsite on the company intranet. The old Analyst Relations microsite contains out-of-date information and is hard to maintain. Using Microsite Management will make setting up the site and maintaining content much easier. The new site will include links to analysts' reports, lists of key contacts, information on the company's policies, and reports on competitors.

In cooperation with the company intranet administrator, the microsite owner reviews the existing structure of the company's Web site. Together they determine that the new Analyst Relations microsite should be available from the Sales root-level page. After the company intranet administrator has created the Sales root-level page, the microsite owner creates the new Analyst Relations page link on the Sales screen.

The microsite owner creates links to other intranet and Internet pages and to views within the Siebel application. He adds some text and graphics along with content created in applications such as Microsoft Word, Microsoft Excel, HTML, and Adobe Acrobat.

The microsite owner associates the access groups to each of the page items. He makes sure that only certain groups of end users will see the items displayed on the page and also that the right contributors are able to edit the items' content.

Date ranges are also associated with each of the page items, so that only current content appears on the page. Because a number of page items require the same access groups and dates, the microsite owner uses the group properties feature, which allows him to set the same properties for all selected items together.

At various stages in the page design, the microsite owner previews the page. Because some of the content is time sensitive, he previews the page as it will appear on several dates in the future.

In order that users can use the Siebel Search Center to find the page, the microsite owner creates search indexes on the content.

When the content is complete, the microsite owner publishes the new page directly from the Microsite Management screen and deletes the old page.

All the pages available from the Sales page may contain the same set of links and images in the navigation bar. This set of links should typically be created in a template. When the new Analyst Relations page is complete, the microsite owner edits the template to include a link to the new page. All the Sales pages containing that template now contain a link to the new page.

## Microsite Scenario with Content Center

Depending upon the complexity of the analyst relations microsite and the approvers (and authors) involved, the company may choose to use Content Center to streamline the production of this microsite, as outlined here:

- The corporate marketing director in charge of analyst relations creates a content project that her team uses to create the analyst relations microsite; in the project she specifies the tasks involved in producing the microsite.
- The Content Center workflow routes these tasks to the designated microsite owner who views them in his Content Inbox.
- The microsite owner drills down on the content task and creates the new analyst relations microsite.
- After content has been drafted, the microsite owner submits them for approval to the designated reviewers in the project's approval workflow.
- When the microsite and its contents have been approved, the microsite is published from the Content Center's staging environment to the production environment.

## Process of Microsite Management

This is an example of a simple process flow for Microsite Management. Your company may follow a different process according to its business requirements.

- 1 ["Viewing and Editing Page Information" on page 48](#) (to review the existing structure of the Web site)
- 2 ["Creating a Root-Level Page" on page 50](#) (to create a root-level page, if necessary)
- 3 ["Using the Create New Page Tool" on page 52](#) (to create a new page linked to the root-level page)
- 4 ["Using the Page Designer and Its Tools" on page 51](#) (to edit the page, and add links and other content)
- 5 ["Managing Groups of Page Items" on page 66](#) (to set access groups and activation dates for content)
- 6 ["Previewing a Page" on page 66](#) (to preview the new page)
- 7 ["Publishing a Page" on page 67](#) (to publish the new page)
- 8 ["Deleting a Page" on page 68](#) (to delete the old page)
- 9 ["Creating and Applying Templates" on page 68](#) (to edit templates used on multiple pages)

## Viewing and Editing Page Information

The Page Administration view includes:

- The Page Administration Explorer tree.
- A list of pages, displaying those pages at the level selected on the tree.
- A More Info form displaying fields associated with the page selected in the page list.
- A templates list displaying the templates associated with a page.

The *root-level* pages are the top level of the page hierarchy. All other pages are children of a root-level page or another page.



This structure helps you organize the pages. However, there are no requirements for, or restrictions on, hypertext links between child and parent pages.

The position of a page in the hierarchy is determined by the Parent Page field and the Order field.

Figure 5 shows the Page Administration Explorer tree and the Page list of the Page Administration view.

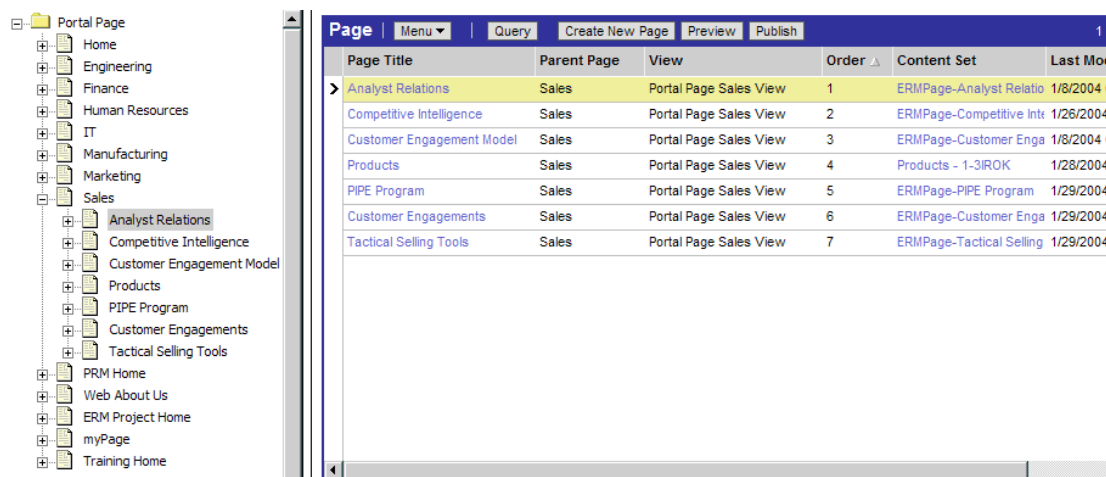


Figure 5. Page Administration Explorer Tree and Page List Applets

This task is a step in the ["Process of Microsite Management"](#) on page 48.

### To find a page in the tree and modify its properties

- 1 Navigate to the Microsite Management (or Administration - Microsite) screen > Page Administration > More Info view.
- 2 Use the Page Administration Explorer tree to find and select the page whose properties you want to modify.
- 3 In the More Info form, edit fields as required.

Some fields are described in the following table.

| Field       | Comments  |
|-------------|---|
| Page Title  | A title for the page, up to 90 characters long. This title is used to identify the record but does not appear on the microsite.                       |
| Parent Page | The parent page determines where the page is nested in the page hierarchy.  |
| View        | Determines the Siebel view that the page is based on. For information about creating new views, see <i>Configuring Siebel Business Applications</i> . |
| Order       | Determines the sequence of the page in its level of the Page Administration Explorer tree.  |

| Field          | Comments  |
|----------------|---|
| Access Groups  | <p>Use this field to restrict read and read-write (select Editor field) access to this page.</p> <p>If this field is blank, there are no restrictions on who can view and edit this page, provided they have the view responsibilities for the template view and the Page Designer view.</p> <p>If no editor is specified, all the access groups can edit this page.</p> <p>If you do not have access to this page, the Page Title hyperlink is unavailable in the Page list.</p> |
| Item Approvers | If one or more access groups are specified for this field, only users who belong can set the status of page items to approved.  |
| Description    | Typically used to describe the page.  |
| Comments       | Typically used to enter comments about changes made to the page.  |

## Creating a Root-Level Page

The root-level pages are those pages that appear at the top of the Page Administration Explorer tree. Typically only a few employees should have the responsibilities required to access the Portal Screen Administration view where root-level pages can be created.

In general, you have a screen tab for each of the root-level pages. You can use Siebel Tools to create a screen tab for a new root-level page. For information, see the page tabs topic in *Configuring Siebel Business Applications*.

Best practice is to standardize on a limited number of these pages in order to keep the top root-level of the explorer tree uncluttered and to restrict the number of screen tabs in the application.

This task is a step in the [“Process of Microsite Management” on page 48](#).

### To create a root-level page

- 1 Navigate to the Microsite Management (or Administration - Microsite) screen > Portal Screen Administration view.
- 2 In the Portal Screen list, create a new record and complete the necessary fields.

Some fields are described in the following table.

| Field             | Comments  |
|-------------------|---|
| Screen            | Name for the root-level page.   |
| Default View Name | <p>Determines the Siebel view that the page is based on. For information about creating new views, see <i>Configuring Siebel Business Applications</i>.</p> <p>The view that determines the Web template used by this page.</p> |

| Field         | Comments  |
|---------------|---|
| Access Groups | <p>Use this field to restrict read and read-write (select Editor field) access to this page.</p> <p>If this field is blank there are no restrictions on who can view and edit this page, provided they have the view responsibilities for the template view and the Page Designer view.</p> <p>If no editor is specified, all the access groups can edit this page.</p> |
| Order         | Determines the sequence of the page at the top level of the Page Administration Explorer tree.  |
| Inactive      | If the root-level page is inactive, the root-level page and its child pages do not appear in the Page Administration view   |

## Using the Page Designer and Its Tools

The Page Designer view is the center of the Microsite Management module. The Page Designer applet contains a graphical drag-and-drop page layout and tools for adding unstructured content, such as text, graphics, links to Siebel views, and links to other pages, to the designated sections of your page.

In the Page Designer UI, applets that contain structured content (such as an Activities, Opportunities, or Calendar applet on an employee's page) are indicated by the words "Not Editable."

These sections describe the tools that you use to place page items (content and links):

- ["Using the Create New Page Tool" on page 52](#)
- ["Using the Insert Template Tool" on page 54](#)
- ["Using the Create Menu Tool" on page 55](#)
- ["Using the Link Existing Page Tool" on page 57](#)
- ["Using the Link App View Tool" on page 58](#)
- ["Using the Add Web Link Tool" on page 59](#)
- ["Using the Create Content Tool" on page 61](#)
- ["Using the Insert Content Tool" on page 61](#)
- ["Using the Insert File and the Insert Image Tools" on page 62](#)

These sections describe tasks you can do in the Page Designer:

- ["Editing Page Item Properties" on page 64](#)
- ["Deleting Page Items" on page 65](#)
- ["Saving and Canceling Changes to the Page Layout" on page 65](#)

## Using the Create New Page Tool

There are two ways to create a new page:

- Using the Create New Page button in the Page Administration view.
- Using the Create New Page tool in the Page Designer (see the following procedure).

When using the Create New Page tool, you choose a parent page where you want to create a link to the new child page. This places the page properly in the page hierarchy and makes sure that you do not create an *orphan* page (a page that is not accessible from any other page).

When you create a new page, it is likely that you want the page to look much like the parent page. For example, you might want to keep the same copyright information in the footer and the same list of links in the navigation bar. When you create the new page, you can select what content you want to copy from the parent to the child page.

Similarly, you can have the child page inherit the same access controls as the parent.

**NOTE:** If you want to create a new root-level page, see [“Creating a Root-Level Page” on page 50](#).

This task is part of [Step 4](#) in the [“Process of Microsite Management” on page 48](#).

### *To create a new page*

- 1** Navigate to the Microsite Management (or Administration - Microsite) screen > Page Administration view.
- 2** In the Page list, click the Page Title hyperlink for the page that will contain a link to the new page.
- 3** From the Page Designer toolbar, drag the Create New Page tool to the position on the layout where you want the new page link to appear.

#### 4 Complete the fields in the Create New Page dialog box.

Some fields are described in the following table.

| Field   | Comments  |
|---|---|
| Name  | This is the text that appears as the navigation link to the new page.   |
| Release Date  | Specifies the date when the link becomes active.<br><br>The link appears when the date is between the release date and the expiration date and the status is Approved.  |
| Expiration Date   | Specifies the date when the link is no longer active.   |
| Access Group  | Use this field to restrict read and read-write (select Editor field) access to the navigation link.<br><br>If this field is blank there are no restrictions on who can view and edit this navigation link.<br><br>If no editor is specified, all the access groups can edit this navigation link.   |
| Status  | The status of the link: Approved, Designed, Draft, Final, Printed, Shipped, or Submitted.<br><br>The Approved and Draft status fields determine what content is displayed in the page preview. See <a href="#">“Previewing a Page” on page 66</a> .<br><br>If access groups are specified for Item Approvers field (Page Administration > More Info view), then only users who belong can set the status to Approved. |
| Title   | A title for the page, up to 90 characters long. This title is used to identify the record but does not appear on the microsite.   |
| Order   | Determines the sequence of the page in its level of the Page Administration Explorer tree.  |
| <input type="checkbox"/> Page Title<br><input type="checkbox"/> Navigation Bar<br><input type="checkbox"/> Body<br><input type="checkbox"/> Quick Picks<br><input type="checkbox"/> Page Footer | A check mark in these boxes indicates the content in the sections of the current page which are copied into the new page. Sections must exist on the selected page if they are to be copied to the new page.  |
| <input type="checkbox"/> All Other Sections   | If you have used Siebel Tools to configure views with new applet types that contain unstructured content, then checking All Other Sections copies content from those sections to the new page.  |

| Field                   | Comments   |
|-------------------------|--|
| Inherit Access Controls | <p>If selected, Access Group values for the new page and any page items copied are inherited from the current (parent) page.</p> <p>If not selected, there are no access restrictions on who can view and edit the new page.</p> |
| Open New Page           | If selected, the new page opens in the Page Designer UI when the link is saved. If not selected, the Page Designer UI continues to display the current (parent) page after the link is saved.                                    |

**NOTE:** By default, the Parent Page and View are the same as those in the linked-from page chosen in [Step 2 on page 52](#). These fields, as well as the Description field, can be edited in the Page Administration view; see [“Viewing and Editing Page Information” on page 48](#).

## Using the Insert Template Tool

Use the template tool to place templates (predefined sets of page items) on the page.

For information about templates, see [“Creating and Applying Templates” on page 68](#).

This task is part of [Step 4](#) in the [“Process of Microsite Management” on page 48](#).

### *To insert a template*

- 1 Open the page you want to edit in the Page Designer:
  - a Navigate to the Microsite Management (or Administration - Microsite) screen > Page Administration view.
  - b In the Page list, click the Page Title hyperlink.
- 2 From the Page Designer toolbar, drag the Insert Template tool to the position on the layout where you want the template to appear.
- 3 Complete the fields in the Insert Template dialog box.

Some fields are described in the following table.

| Field  | Comments  |
|--------|---|
| Name   | This is the name of the template.   |
| Status | <p>The status of the link: Approved, Designed, Draft, Final, Printed, Shipped, or Submitted.</p> <p>The Approved and Draft status fields determine what content is displayed in the page preview. See <a href="#">“Previewing a Page” on page 66</a>.</p> |

## Using the Create Menu Tool

Menus are containers for links. Menus format links in three ways, as shown in [Figure 6](#):

- Hierarchical menus
- Dropdown menus
- List menus

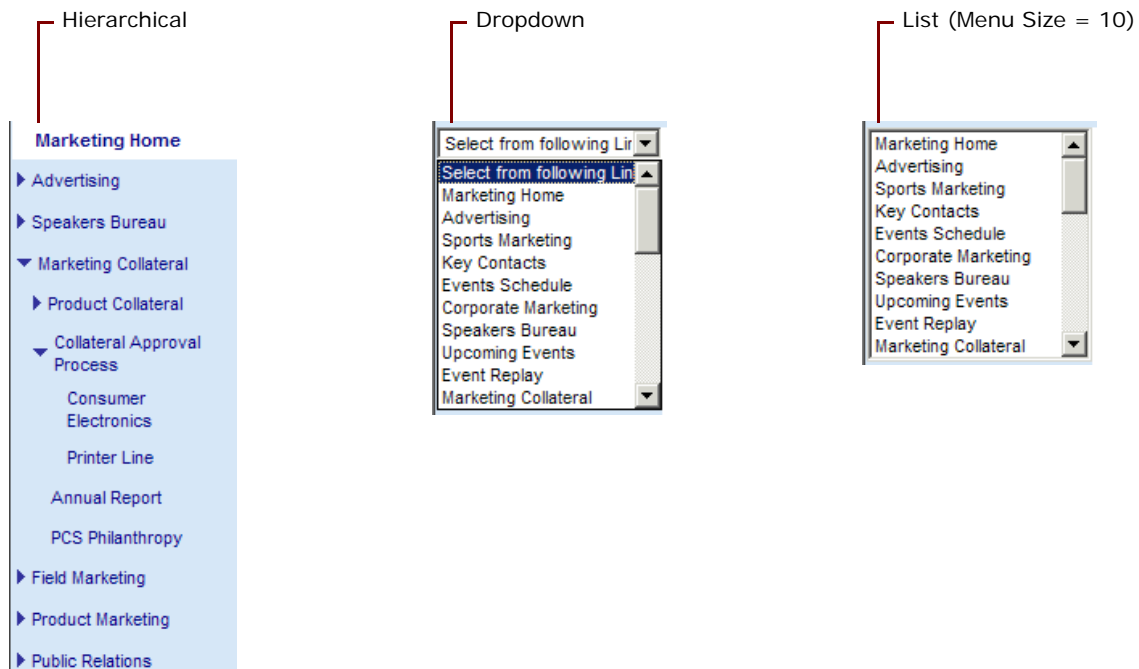


Figure 6. Types of Menu

Most typically, you want to add menus to the navigation bar of your page, but menus can be added to any page section.

This task is part of [Step 4](#) in the “[Process of Microsite Management](#)” on [page 48](#).

### To create a menu of links

- 1 Open the page you want to edit in the Page Designer:
  - a Navigate to the Microsite Management (or Administration - Microsite) screen > Page Administration view.
  - b In the Page list, click the Page Title hyperlink.
- 2 From the Page Designer toolbar, drag the Create Menu tool to the position on the layout where you want the menu to appear.

### 3 Complete the fields in the Create Menu dialog box.

Some fields are described in the following table.

| Field           | Comments  |
|-----------------|---|
| Name            | This is the name of the menu.   |
| Menu Type       | See <a href="#">Figure 6 on page 55</a> .   |
| Release Date    | Specifies the date when the menu becomes active.<br><br>The menu appears when the date is between the release date and the expiration date and the status is Approved.  |
| Expiration Date | Specifies the date when the menu is no longer active.   |
| Menu Size       | Only applies to menus of type Menu List. Enter the number of menu items to show in the list at one time.  |
| Status          | The status of the link: Approved, Designed, Draft, Final, Printed, Shipped, or Submitted.<br><br>The Approved and Draft status fields determine what content is displayed in the page preview. See <a href="#">"Previewing a Page" on page 66</a> . |
| Access Group    | Use this field to set access groups while creating page items.  |

### 4 Create links for the menu using the link tools described in the following topics.

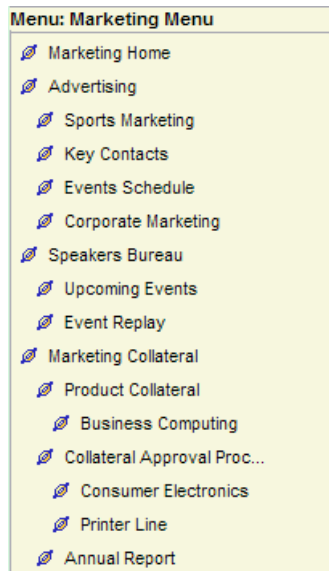
### 5 If you are creating a hierarchical menu, indent links to create the hierarchy:

- To indent one link, right-click the link and choose Increase Indent or Decrease Indent.



- To indent multiple links, see [“Managing Groups of Page Items” on page 66](#).

This is the indentation used to produce the hierarchical menu shown in [Figure 6 on page 55](#).



If indentation is incorrect, menu creation will not function properly and the menu rendered will be incorrect. A page item's indent level difference between the page item above and the page item below should always be +/- 1. It should never be greater than 1 or the menus will not get created and rendered properly.

For more information about configuring hierarchical menus, see [“Configuring Menu Colors and Icons for Hierarchical Menus” on page 72](#).

## Using the Link Existing Page Tool

Using the Link Existing Page tool, you can create navigation links to other pages *within* the Microsite Management system.

If you want to create navigation links to external pages, see [“Using the Add Web Link Tool” on page 59](#).

This task is part of [Step 4](#) in the [“Process of Microsite Management” on page 48](#).

### *To create a navigation link between Microsite Management pages*

- 1 Open the page you want to edit in the Page Designer:
  - a Navigate to the Microsite Management (or Administration - Microsite) screen > Page Administration view.
  - b In the Page list, click the Page Title hyperlink.

- 2 From the Page Designer toolbar, drag the Link Existing Page tool to the position on the layout where you want the new page navigation link to appear.
- 3 Complete the fields in the Link Existing Page dialog box.

Some fields are described in the following table.

| Field           | Comments  |
|-----------------|---|
| Name            | This is the text that appears as the navigation link to the new page.   |
| View-Page       | Select the target page for the navigation link. You can select any page in the application from the Pick Parent Page dialog box.  |
| Release Date    | Specifies the date when the navigation link becomes active.<br><br>The link appears when the date is between the release date and the expiration date and the status is Approved.   |
| Expiration Date | Specifies the date when the navigation link is no longer active.  |
| Access Group    | Use this field to restrict read and read-write (select Editor field) access to this page.<br><br>If this field is blank there are no restrictions on who can view and edit this page, provided they have the view responsibilities for the template view and the Page Designer view.<br><br>If no editor is specified, all the access groups can edit this page item. |
| Status          | The status of the link, for example Approved, Designed, Draft, Final, Printed, Shipped, or Submitted.<br><br>The Approved and Draft status fields determine what content is displayed in the page preview. See <a href="#">“Previewing a Page” on page 66</a> .   |

## Using the Link App View Tool

Using the Link App View tool, you can create links from a page to a particular view in the Siebel application.

For example, you might want to create a link from your sales representatives' home page to the My Expense Reports view on the Expense Reports screen.

This task is part of [Step 4](#) in the [Process of Microsite Management on page 48](#).

### *To create a link from a page to a view in the Siebel application*

- 1 Open the page you want to edit in the Page Designer:
  - a Navigate to the Microsite Management (or Administration - Microsite) screen > Page Administration view.
  - b In the Page list, click the Page Title hyperlink.

- 2 From the Page Designer toolbar, drag the Link App View tool to the position on the layout where you want the application link to appear.
- 3 Complete the fields in the Link Application View dialog box.

Some fields are described in the following table.

| Field           | Comments   |
|-----------------|--|
| Name            | This is the text that appears as the navigation link to the new page.  |
| View            | From the Pick View dialog box, choose the application view that you want to display when the link is clicked.  |
| Release Date    | Specifies the date when the navigation link becomes active.<br><br>The link appears when the date is between the release date and the expiration date and the status is Approved.  |
| Expiration Date | Specifies the date the link is no longer active.   |
| Access Group    | Use this field to restrict read and read-write (select Editor field) access to this page item.<br><br>If this field is blank there are no restrictions on who can view and edit this page item.<br><br>If no editor is specified, all the access groups can edit this page item. |
| Status          | The status of the link: Approved, Designed, Draft, Final, Printed, Shipped, or Submitted.<br><br>The Approved and Draft status fields determine what content is displayed in the page preview. See <a href="#">“Previewing a Page” on page 66</a> .                              |

## Using the Add Web Link Tool

Using the Add Web Link tool, you can link to external pages, identified by a URL. For example, on your microsite, you can provide links to your partners' Web sites.

There are a number of ways that the external page can be displayed from the Microsite Management page:

- **Frame.** Within the frame of the current page.
- **In-Line.** Directly in the applet on the current page. Displaying pages in-line works best with simple pages. Large or complex pages, such as those that use JavaScript, can slow down the system and cause unexpected results. Be sure to test in-line pages.
- **New Window.** Launching a new browser window when the link is clicked; this allows the user to switch between the two pages.
- **Window.** Displaying the external page in the current browser window.

This task is part of [Step 4](#) in the [“Process of Microsite Management” on page 48](#).

### To create a link from a page to an external page

- 1 Open the page you want to edit in the Page Designer:
  - a Navigate to the Microsite Management (or Administration - Microsite) screen > Page Administration view.
  - b In the Page list, click the Page Title hyperlink.
- 2 From the Page Designer toolbar, drag the Add Web Link tool to the position on the layout where you want the external link to appear.
- 3 Complete the fields in the Add Web Link dialog box.

Some fields are described in the following table.

| Field           | Comments   |
|-----------------|--|
| Name            | This is the text that appears as the navigation link to the new page.  |
| URL             | <p>Enter the exact URL of the destination for the link. Be sure to include the appropriate prefix for the URL. For example, http://, https://, ftp://, and so on.</p> <p>If the prefix is missing, the result is unpredictable.</p>  |
| Symbolic URL    | <p>Instead of entering a URL, choose a symbolic URL. (Symbolic URLs can be set up in the Administration - Integration screen.)</p> <p>For example, enter the symbolic URL of an Analytics report.</p>  |
| HTML Display    | Choose how the external page is displayed: Frame, In-Line, New Window, or current Window.  |
| Release Date    | <p>Specifies the date when the link becomes active.</p> <p>The link appears when the date is between the release date and the expiration date and the status is Approved.</p>  |
| Expiration Date | Specifies the date when the link is no longer active.  |
| Access Group    | <p>Use this field to restrict read and read-write (select Editor field) access to this page item.</p> <p>If this field is blank, there are no restrictions on who can view and edit this page item.</p> <p>If no editor is specified, all the access groups can edit this page item.</p> |
| Status          | <p>The status of the link: Approved, Designed, Draft, Final, Printed, Shipped, or Submitted.</p> <p>The Approved and Draft status fields determine what content is displayed in the page preview. See <a href="#">"Previewing a Page" on page 66</a>.</p>                                |

## Using the Create Content Tool

Using the Create Content tool, you can create rich-text content directly to the page through the integrated HTML editor.

Typically, you would use the Create Content Tool for creating short or simple content, such as captions or labels.

**NOTE:** To create complex HTML or large amounts of text, you may prefer to use a third-party HTML or text editing application to create an HTML file, and then place the file's contents on the page using the Insert File tool. See ["Using the Insert File and the Insert Image Tools" on page 62](#).

The formatted text entered and saved in the editor is saved as a content asset in the Content Asset Management's repository. For more information about the content assets, see [Chapter 3, "Content Asset Management."](#)

For general information about the integrated HTML editor, see *Siebel Fundamentals*.

This task is part of [Step 4](#) in the ["Process of Microsite Management" on page 48](#).

### To add HTML directly to a page

- 1 Open the page you want to edit in the Page Designer:
  - a Navigate to the Microsite Management (or Administration - Microsite) screen > Page Administration view.
  - b In the Page list, click the Page Title hyperlink.
- 2 From the Page Designer toolbar, drag the Create Content tool to the position on the layout where you want the new content type to appear.
- 3 In the Create Content dialog box, enter a name for the content in the Name field and then click Edit HTML.
- 4 In the editor, type and format text, and add links and graphics.
- 5 Click Save to save the HTML to the content asset repository and close the HTML Editor.
- 6 Complete the fields in the Create Content dialog box.

Some of the fields are described in the table in [Step 3 in the "To create a link from a page to an external page" procedure on page 60](#).

## Using the Insert Content Tool

Using the Insert Content tool, you can add to your page content assets that stored in the content asset repository. For more information about the content assets, see [Chapter 3, "Content Asset Management."](#)

For example, there may be a content asset that is a GIF image of your corporate logo, which you want to use to brand your page. Or, a content asset may be an Adobe Acrobat file, describing departmental policies, that you want to link to your page.

This task is part of [Step 4](#) in the ["Process of Microsite Management" on page 48](#).

### *To add content assets to a page*

- 1 Open the page you want to edit in the Page Designer:
  - a Navigate to the Microsite Management (or Administration - Microsite) screen > Page Administration view.
  - b In the Page list, click the Page Title hyperlink.
- 2 From the Page Designer toolbar, drag the Insert Content tool to the position on the layout where you want to add the content asset.
- 3 In the Insert Content dialog box, click the select button in the Asset Name field and use the Pick Content dialog box to select the content asset you want to add.

The Pick Content dialog box filters the content assets:

  - The default filter shows assets in the content set for the current page.
  - Click the ellipsis button to select a different content set.
  - Click Find All to list content assets in all content sets.
- 4 Complete the fields in the Insert Content dialog box.

Some of the fields are described in the table in [Step 3 in the "To create a link from a page to an external page" procedure on page 60](#).

## Using the Insert File and the Insert Image Tools

Using these tools, you can insert files (such as HTML files, MS Word files, and Adobe Acrobat files) and graphics files from your local file system, from shared networks and from the Web.

The difference between using the Insert File tool and the Insert Image tool is that the HTML display for the Insert Image tool is always set to In-Line.

When these files are added to your page, they are also stored as content assets in the content asset repository. For more information about the content assets, see [Chapter 3, "Content Asset Management."](#)

This task is part of [Step 4](#) in the ["Process of Microsite Management" on page 48](#).

### *To add a file or graphic to a page*

- 1 Open the page you want to edit in the Page Designer:
  - a Navigate to the Microsite Management (or Administration - Microsite) screen > Page Administration view.
  - b In the Page list, click the Page Title hyperlink.
- 2 From the Page Designer toolbar, drag the Insert File (or the Insert Image) tool to a position on the layout.

The Insert File (or the Insert Graphic) dialog box appears.
- 3 Do either of the following actions:

- Click the ellipsis button and specify a local file.
  - Type in a URL or network path.
- 4 If you typed in a URL or network path, click the URL button and set the URL and network file options in the dialog box.

Some fields are described in the following table.

| Field                    | Comments  |
|--------------------------|---|
| Retrieve Graphics        | Select to have graphics on the specified Web page copied along with the text.   |
| Follow Links             | Select to have the pages that are linked-to from the specified Web page are copied, and, in turn, links to those pages copied as well.                                      |
| Restrict to Subdirectory | Select so that, if links are followed, only links to pages within the same directory as the specified page are copied.  |
| Max Depth                | Indicates the level to which links are copied. For example, if Max Depth = 1, pages that are linked-to from the specified page are copied, but not pages that they link to. |

For more information about adding content assets and setting up how files are imported, see [“Adding Content Assets to a Content Set” on page 35](#) and [“About Configuring Content Asset Management” on page 40](#)

- 5 In the Insert File or Insert Image dialog box, complete the fields.
- Some of the fields are described in the table in [Step 3 in the “To create a link from a page to an external page” procedure on page 60](#).
- 6 (Optional) Click the Advanced button and set the options.

Some fields are described in the following table.

| Field        | Comments   |
|--------------|--|
| Title        | Enter a descriptive title for the content set. If no title is provided, the Name of the page item is used for the content asset title. (The Name for the content asset record is the file name, not the page item name.) |
| Content Type | Leave this field set to Auto-Detect (the default) to have the application determine the asset type, or select a type from the dialog box to set a specific type.   |
| Lock         | Select this to lock the content asset, so that others cannot edit it.  |
| Comments     | Enter comments for this version of the content asset.  |

## Editing Page Item Properties

The preceding topics explained how to use the Page Designer UI to create new page items, for example, links to pages and graphics.

To edit page item properties, you select a page item on the Page Designer UI and modify its properties in the Page Item Properties form. The fields and buttons that are available in the Page Item Properties view depend upon the type of page item selected.

Items of type HTML, Web Content, Graphics, and File are content assets and are stored in the content asset repository. Details about these content assets can be viewed in the Asset Detail view, and these content assets can also be checked out for editing.

Some items can be edited using the integrated HTML Editor, launched from the Edit HTML button on the Page Item Properties form.

This task is part of [Step 4](#) in the ["Process of Microsite Management" on page 48](#).

### *To edit a page item*

- 1 Open the page you want to edit in the Page Designer:
  - a Navigate to the Microsite Management (or Administration - Microsite) screen > Page Administration view.
  - b In the Page list, click the Page Title hyperlink.
- 2 In the Page Designer UI, select the page item whose properties you want to edit.
- 3 In the Page Item Properties form, edit the fields.
 

**NOTE:** Those fields and buttons that are not appropriate for the selected page item are unavailable.
- 4 Use the Check Out, Check In, Lock, and Unlock buttons to open and edit content. (For more information about checking out content assets and locking content assets, see [Chapter 2, "Content Center."](#))
- 5 Click Asset Details to open the Content Assets view and to:
  - a See information about the selected item.
  - b Roll-back to a previous version of the content asset.
  - c Review the content asset for broken links.

For more information about the Content Assets view, see [Chapter 2, "Content Center."](#)
- 6 To edit HTML content, click Edit HTML.
 

For more information about the integrated HTML editor, see *Siebel Fundamentals*.



## Deleting Page Items

Deleting items from a page is done through the Web Designer UI.

**NOTE:** Any item that has been saved in the content asset repository remains there even after the associated page item is deleted.

This task is part of [Step 4](#) in the “[Process of Microsite Management](#)” on [page 48](#).

### *To delete a page item*

- 1 Open the page you want to edit in the Page Designer:
  - a Navigate to the Microsite Management (or Administration - Microsite) screen > Page Administration view.
  - b In the Page list, click the Page Title hyperlink.
- 2 In the Page Designer UI, select the page item and press CTRL + DEL.

## Saving and Canceling Changes to the Page Layout

In the Page Designer view, page records are saved in the same way that other records are saved in the application.

Use the Cancel button to return page items to their last-saved positions, removing any just-created page items and adding back any just-deleted page items.

However, changes made to the page item properties (such as Status) are not lost when Cancel is clicked.

For example, if you move a link from the navigation bar to quick picks, change its status from Draft to Approved, and then click Cancel, the link returns to the navigation bar but its status remains Approved.

This task is part of [Step 4](#) in the “[Process of Microsite Management](#)” on [page 48](#).

### *To save a page record*

- In the Page Designer view, do one of the following:
  - Click Save.
  - Click Preview.
  - Select another page.
  - Navigate to a different view.

### *To cancel changes to the page layout*

- After making changes to the page layout in the Page Designer UI, click Cancel.

The layout reverts to how it was when the record was last saved.

## Managing Groups of Page Items

To make page management easier, page items can be grouped and common properties assigned to them. For example, use grouping to:

- Set the indent level for a group of menu items.
- Set a release date for a group of page items.

This task is a step in the [Process of Microsite Management on page 48](#).

### *To group page items*

- 1 Open the page you want to edit in the Page Designer:
  - a Navigate to the Microsite Management (or Administration - Microsite) screen > Page Administration view.
  - b In the Page list, click the Page Title hyperlink.
- 2 Select all of the page items you want to manage as a group.

Hold the SHIFT key while clicking on the page items to select multiple items.
- 3 Click Group Properties.
- 4 Complete the fields as required in the Page Items Group dialog box.

Only those properties that are common to all types of page items appear in this dialog box: Increase Indent, Decrease Indent, Release Date, Expiration Date, Access Group, and Status.

## Previewing a Page

After laying out the content on the Page Designer UI, you can preview the page.

Whether or not content appears on the displayed page depends upon the page item's release date, expiration date, and status.

The preview feature in Page Designer allows you to:

- Set a date for the preview (content inactive on that date does not appear).
- Choose to display only approved content, only draft content, both approved and draft content, or all content regardless of status.

This task is a step in the ["Process of Microsite Management" on page 48](#).

### *To preview a page*

- 1 Open the page you want to preview in the Page Designer:
  - a Navigate to the Microsite Management (or Administration - Microsite) screen > Page Administration view.
  - b In the Page list, click the Page Title hyperlink.

- 2 Click Preview.
- 3 In the Preview Details dialog box, specify the Preview Status and Preview Date and click OK.  
The rendered page appears in preview mode.
- 4 Return to the Page Designer UI by clicking the back button.

## Publishing a Page

You can publish the page directly from the Page Administration view of the Microsite Management screen.

**CAUTION:** Before you can publish from the Microsite Management screen you need to set up the workflows for content projects. See [Chapter 2, "Content Center."](#)

The Publish button on the Page Administration view:

- Creates a content project for each page.
- Names the content project: *project-prefix page-name date time*, for example MyProject Publish Folders 01/22/2004 11:03:48.
- Sets the Publication Workflow for the content project to Content Publish.
- For each page item, creates a content item of type Microsite Folder.
- Invokes the Approval Workflow for the Microsite Folder content type. (This workflow should be set to Auto Complete. It changes the status of each item to Completed so that it can be published.)
- Invokes the Content Publish workflow for the content project. (This workflow calls the Export method of the Content Project business service, which exports the project from the staging environment to the production environment or the export directory.)

### To publish a page

- 1 Navigate to the Microsite Management (or Administration - Microsite) screen > Page Administration > More Info view.
- 2 In the Page list, select the page or pages you want to publish.  
You can only publish pages for which you have write access.
- 3 Click Publish.
- 4 Complete the fields in the Publish Project Details dialog box.

| Field               | Comments   |
|---------------------|--|
| Project Prefix      | Enter text for the project name.                               |
| Publish Child Pages | Select to have the child pages of the selected page published. |

## Deleting a Page

Pages can be deleted from the Page Administration view. Root-level pages can also be deleted from the Portal Screen Administration view.

When a page is deleted:

- The status of any navigation links to that page (on other pages within Microsite Management) is changed to Draft. This prevents broken links from appearing on displayed pages.
- The Access Group field for any navigation links to the page are reset (no access restrictions).
- The target page (View-Page) for the link is set to NULL. When you edit a link where the View-Page is NULL, you must specify a valid View-Page before you can save changes to the link.

### *To delete a page*

- 1 Navigate to the Microsite Management (or Administration - Microsite) screen > Page Administration view.

The hierarchical structure of screens and subordinate pages appears on the left, and the page list and detail form appear on the right. Click the + sign to expand a folder.

- 2 Select the page you want to delete, and delete the record.

## Creating and Applying Templates

Templates are sets of page items that are created in the Template Designer and can be placed on page sections. Templates are best used for content that appears on multiple pages and that may require updating.

The advantages of templates are as follows:

- Templates can be applied to many pages at once.
- When a template is updated, the updated content appears on all pages referencing that template.

Figure 7 shows the Template Administration view. Templates can be organized into folders.

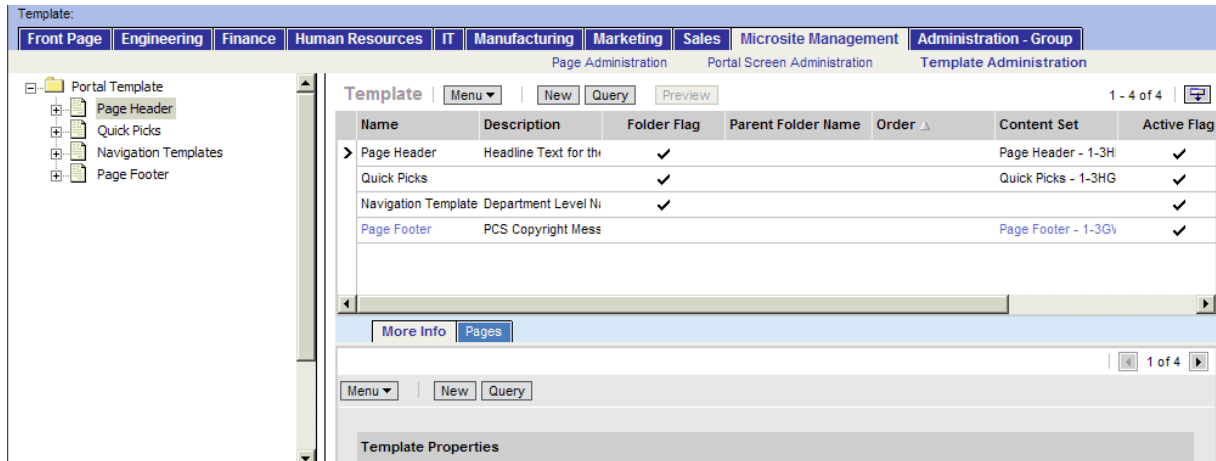


Figure 7. Template Administration View

The templates you create can be added to:

- Individual pages in the Page Designer, see [“Using the Insert Template Tool” on page 54.](#)
- Many pages at once, see [“To add a templates to multiple pages” on page 70.](#)

### To create a template

- 1 Navigate to the Microsite Management (or Administration - Microsite) screen > Template Administration view.
- 2 In the Template list, create a new record and complete the necessary fields.

Some fields are described in the following table.

| Field       | Comments   |
|-------------|--|
| Folder Flag | Leave blank.<br>(Select the folder flag to create a folder to contain template items.)         |
| Order       | Determines the sequence of the template at the top level of the Portal Template Explorer tree. |
| Active      | If the template is active it can be added to pages (using the Insert Template tool).           |

- 3 Drill down on the template name.
- 4 Use the Template Designer to add and edit items on the template.

The tools on the Template Designer work the same way as the tools on the Page Designer. (See [“Using the Page Designer and Its Tools” on page 51.](#))

### *To add a templates to multiple pages*

- 1 Navigate to the Microsite Management (or Administration - Microsite) screen > Template Administration > Pages view.
- 2 In the Templates list, select the template you want to add.
- 3 In the Pages list, click Add to Pages.
- 4 Complete the fields and follow the directions given in the Add Template to Pages dialog box.

## About Creating Search Indexes

Content assets on microsite pages can be integrated with the Siebel Search Center. This allows users to find pages by searching for keywords. For information about creating indexes for Search Center, see *Siebel Search Administration Guide*.

## About Configuring Microsite Management

There are a number of aspects of Microsite Page Management that you can configure:

- ["Configuring Microsite Caching" on page 70](#)
- ["Adding New View Layouts to the mmlayout.txt File" on page 71](#)
- ["Configuring Menu Colors and Icons for Hierarchical Menus" on page 72](#)
- ["Changing the Navigation Bar Style in Microsite Pages" on page 73](#)

## Configuring Microsite Caching

By default, page caching of microsite pages and content is turned on. However, you can configure the caching behavior of microsite pages by editing the application's CFG file.

The advantage of caching is that microsite pages are rendered faster.

The disadvantage of page caching is that if you make a change to a page using Page Designer, the updated page is not displayed until the caching time-out has expired.

**TIP:** If you have both a staging and a production environment, consider using page caching in the production environment, but not in the staging environment.

**To configure caching for microsite pages**

- Create or edit the [ERM Page Rendering] section in your application's CFG file.

See [Table 6](#) for information about the page caching parameters.

**NOTE:** Set time outs according to how often pages and contents are updated. If pages are updated frequently, set time outs low.

Table 6. Microsite Caching Parameters

| Parameter Name                | Comments   | Default |
|-------------------------------|--|---------|
| EnablePageCache               | Page cache caches Microsite page contents including Microsite applets and Group News applets on a per AOM (Application Object Manager) basis.                            | TRUE    |
| EnableDefaultViewPageCache    | The default-view page cache caches the default Microsite page for a view on a per AOM basis.   | TRUE    |
| EnablePageAccessCache         | The page-access cache caches whether a page is private or public on a per AOM basis.   | TRUE    |
| EnableUserPageAccessCache     | The user-page access cache caches whether a given user has access to a particular page on a per user session basis.  | TRUE    |
| EnableUserPageItemAccessCache | The user-page item access cache caches whether a given user has access to a particular page item on a per user session basis.  | TRUE    |
| PageCacheSize                 | Size of page cache in pages.<br><br><b>CAUTION:</b> If PageCacheSize > 256, make sure to monitor the memory usage of the AOM.<br><br>Setting to 0 disables page caching. | 256     |
| PageCacheTimeout              | Lifetime, in minutes, of page cache entries. Setting to 0 disables page caching.   | 5       |
| DefaultViewPageCacheTimeout   | Lifetime, in minutes, for default-view page cache entries. Setting to 0 disables default-view page caching.  | 10      |
| PageAccessCacheTimeout        | Lifetime, in minutes, for page-access cache entries. Setting to 0 disables page-access caching.  | 10      |

**Adding New View Layouts to the mmlayout.txt File**

The mmlayout.txt file is used by Page Designer to schematically represent the layout of the applets in the view ([Figure 4 on page 46](#)). The file contains layout information for each Siebel preconfigured view designed to contain unstructured content.

On a Windows platform, the mmlayout.txt file can be found in *SIEBEL\_ROOT\siebsrvr\bin*. On a UNIX platform, the file can be found in *SIEBEL\_ROOT/siebsrvr/lib*.

If you have created new views in your Siebel application, and you want to use these views for microsite pages, you need to edit the mmlayout.txt file to schematically describe how the applets in your views are laid out.

**NOTE:** For information about creating views, see *Configuring Siebel Business Applications*.

## Configuring Menu Colors and Icons for Hierarchical Menus

You can edit the display colors, line spacing, and icons for hierarchical menu items. (See [Figure 8](#).)

**NOTE:** If you have end users who cannot view color indicators, please see *Accessibility Guide for Siebel Business Applications*.

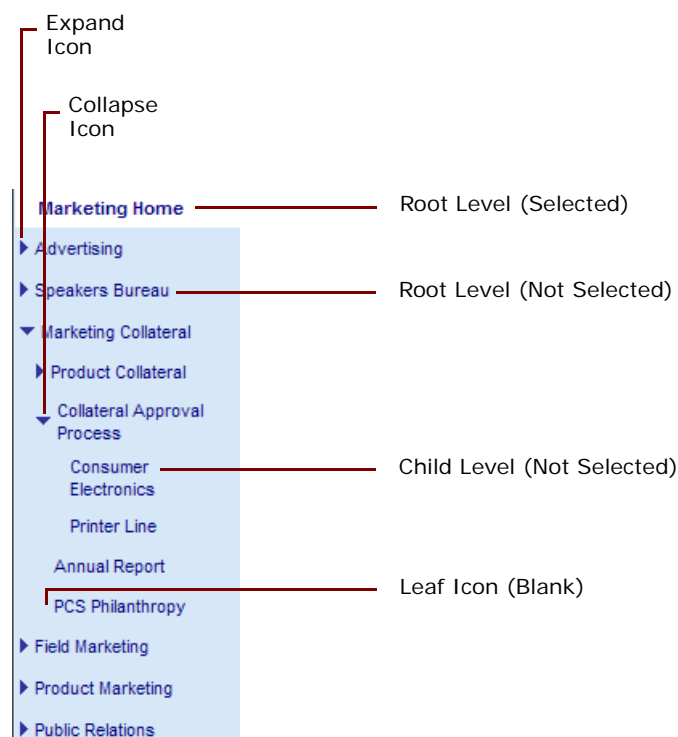


Figure 8. Menu Levels

### To set colors and line spacing for hierarchical menu items

- 1 Open the stylesheet your application is using (main.css or dccMain.css) to change colors and line spacing for hierarchical menu items.



- 2 Edit the file as shown in the following table:

| To Change the Style for This Type of Menu Item... | Edit This Line...                                | In This Section of the File... |
|---|--|--------------------------------|
| Root-level, not selected                          | TD.mmRootLevel TD { COLOR: Navy; HEI GHT: 20; }  | Root Level Menu Items          |
| Child-level, not selected                         | TD.mmChildLevel TD { COLOR: Navy; HEI GHT: 20; } | Child Level Menu Items         |
| Selected (any level)                              | TD.mmSelected TD { COLOR: NAVY; HEI GHT: 20; }   | Menu Item currently selected   |

For example, changing HEI GHT: 20 to LINE-HEI GHT: 0.8em tightens the line spacing to a fixed size.

For more information about editing Siebel Web templates, see *Configuring Siebel Business Applications*.

### To change the expand, collapse, and leaf icons for hierarchical menu items

- Edit the graphics in the following files found in the images directory:

- mm\_expand.gif
- mm\_collapse.gif
- mm\_blank.gif

For more information about images, see *Configuring Siebel Business Applications*.

## Changing the Navigation Bar Style in Microsite Pages

Change the underlying Web template if you prefer the older blue-bordered navigation bar. You can revert to it by changing the underlying Web template used for the Microsite views.

**NOTE:** If you have end users who cannot view color indicators, please see *Accessibility Guide for Siebel Business Applications*.

### To revert to the old blue-bordered navigation bar

- For each Microsite view:

| Change the . . .    | From the Newer . .                      | To the Older . . .              |
|---------------------|---|---------------------------------|
| Applet Web template | ePortalNavBarAppletDeptPage_LeftNav.swt | ePortalNavBarAppletDeptPage.swt |
| View Web Template   | DotCom View 15 60 25 Home               | DotCom View 25 50 25 Home       |



# 5

## Usage Collection

This chapter describes setting up and tracking hits on microsite pages, group news articles, and views and downloading of content assets.

It includes the following topics:

- [“About Usage Collection” on page 75](#)
- [“Scenario for Usage Collection” on page 76](#)
- [“Process of Usage Collection” on page 76](#)
- [“Setting Up the Run-Time Event to Collect Usage Data for Views” on page 76](#)
- [“Setting System Preferences for Usage Collection” on page 77](#)
- [“Reviewing the Usage-Tracking Log Files” on page 78](#)

## About Usage Collection

The usage collection feature creates log files that record when users:

- View microsite pages
- View group news articles
- Download content assets
- (Optionally) View views in the Siebel application

Figure 9 shows an example of a usage-tracking log file.

| User    | IP           | Session ID  | Type          | Row-Id  | Name                         | View-ID | Event Start Date | Event End Date | Status  |
|---------|--------------|-------------|---------------|---------|------------------------------|---------|------------------|----------------|---------|
| APARKER | 172.22.15.82 | w0krFK-Qvmt | MM Page       | 0-11U0X | Home                         | 0-71I5Z | 1/8/2004 8:26    | 1/8/2004 8:26  | Success |
| APARKER | 172.22.15.82 | w0krFK-Qvmt | ViewActivated |         | Portal Page Home View        |         | 1/8/2004 8:26    | 1/8/2004 8:26  | Success |
| APARKER | 172.22.15.82 | w0krFK-Qvmt | MM Page       | 0-71I5Z | Home                         | 0-11U0X | 1/8/2004 8:26    | 1/8/2004 8:27  | Success |
| TSYMTHE | 172.22.16.45 | w0krFK-Qvmt | ViewActivated |         | Portal Page Home View        |         | 1/8/2004 8:30    | 1/8/2004 8:30  | Success |
| TSYMTHE | 172.22.16.45 | w0krFK-Qvmt | MM Page       | 0-11U03 | Human Resources              | 0-71I65 | 1/8/2004 8:30    | 1/8/2004 8:30  | Success |
| TSYMTHE | 172.22.16.45 | w0krFK-Qvmt | ViewActivated |         | Portal Page HR View          |         | 1/8/2004 8:31    | 1/8/2004 8:31  | Success |
| JRUBIN  | 172.22.20.32 | w0krFK-Qvmt | MM Page       | 0-11U03 | HR - Holiday Schedule        | 1-2BHK7 | 1/8/2004 8:35    | 1/8/2004 8:35  | Success |
| JRUBIN  | 172.22.20.32 | w0krFK-Qvmt | ViewActivated |         | Portal Page HR View          |         | 1/8/2004 8:35    | 1/8/2004 8:35  | Success |
| JRUBIN  | 172.22.20.32 | w0krFK-Qvmt | MM Page       | 0-6J8MB | Performance Competency Home  | 0-6J8RV | 1/8/2004 8:35    | 1/8/2004 8:36  | Success |
| JRUBIN  | 172.22.20.32 | w0krFK-Qvmt | ViewActivated |         | ERM Employee View - Personal |         | 1/8/2004 8:36    | 1/8/2004 8:36  | Success |
| JRUBIN  | 172.22.20.32 | w0krFK-Qvmt | ViewActivated |         | Expense List View (ePS)      |         | 1/8/2004 8:36    | 1/8/2004 8:36  | Success |

Figure 9. Sample Log File — CSV Format Displayed in a Spreadsheet Application

Usage is monitored across the database, with a separate log file for each AOM (Application Object Manager) process. New log files can be created each hour, day, week, or month. Log files can be saved in CSV, XML, or W3C format.

These log files provide structured raw data for import into reporting tools; such tools can vary from a simple spreadsheet program to a complex data warehouse application like Siebel Analytics.

## Scenario for Usage Collection

This scenario provides an example of a process performed by the administrator. Your company may follow a different process according to its business requirements.

### Introduction

An organization has recently installed Siebel applications and management wants to measure user adoption. They want to collect information about which employees are using the system and which views and microsite pages are accessed most often.

### The Administrator

The administrator enables usage collection. He chooses to have the usage-tracking log files output in the XML format and to have new log files created each day.

Each morning the administrator reviews the log files from the previous day, imports them into a customized reporting tool, and distributes the resulting reports to others in the implementation team.

## Process of Usage Collection

This example process represents the tasks that are carried out in the [“Scenario for Usage Collection” on page 76](#).

- 1 [“Setting Up the Run-Time Event to Collect Usage Data for Views” on page 76](#)
- 2 [“Setting System Preferences for Usage Collection” on page 77](#)
- 3 [“Reviewing the Usage-Tracking Log Files” on page 78](#)

## Setting Up the Run-Time Event to Collect Usage Data for Views

| If You . . .   | Then . . .   |
|--|--|
| Want to track hits to views in the Siebel application  | You need to create a run-time event to monitor view activation. See the following procedure. |
| Do not want to track hits to views (but do want to track hits to microsite pages, group news articles, and content assets) | Continue to <a href="#">“Setting System Preferences for Usage Collection” on page 77</a> .   |

This task is a step in [Process of Usage Collection on page 76](#).

For information about how to create run-time events, see *Siebel Personalization Administration Guide*.

### **To create a run-time event to collect usage data for views**

- 1 Create an action set.
- 2 Create an action, setting these fields as follows:

| Field Name              | Value                   |
|-------------------------|-------------------------|
| Action Type             | BusService              |
| Business Service Name   | Usage Tracking Service  |
| Business Service Method | EventType=Runtime Event |

- 3 Associate an event with the action set, setting these fields as follows:

| Field Name      | Value   |
|-----------------|---|
| Object Type     | Application   |
| Event           | ViewActivated   |
| Action Set Name | <i>Name of the action set created in <a href="#">Step 1</a></i> |

## Setting System Preferences for Usage Collection

The system preferences for enabling and configuring usage collection are described in [Table 7](#).

Table 7. System Preferences for Usage Collection

| System Preference             | Default | Description  |
|-------------------------------|---------|--|
| UsageTracking Enabled         | FALSE   | Set to TRUE to turn on Usage Collection.   |
| UsageTracking Log Time Period | Hourly  | Specify how often a new log file is created.<br>Allowed values: Hourly, Daily, Weekly, and Monthly.<br><b>CAUTION:</b> Set this according to the usage levels you expect. Monthly may create excessively large log files for a high-usage application. |

Table 7. System Preferences for Usage Collection

| System Preference                 | Default | Description   |
|-----------------------------------|---------|---|
| UsageTracking<br>LogFile Dir      | N/A     | Specify the directory path for the log files. Make sure that the Siebel Server has read and write access to the directory.<br><br>Example: <code>\\fileserver\directory</code>                                    |
| UsageTracking<br>LogFile Encoding | ASCII   | Specify encoding for the log file. This is usually set to ASCII.<br><br>Some other allowed values are UNICODE, ARABIC, GREEK, and HEBREW.   |
| UsageTracking<br>LogFile Format   | XML     | Specify the log file format.<br><br>Allowed values: CSV, XML, and W3C   |
| UsageTracking<br>Sess Cache Size  | 100     | Specify the number of session IDs cached. Session IDs (that map to login IDs and IP addresses) are cached so that this data does not have to be looked up for each user action.<br><br>Allowed values: 10 to 1000 |

This task is a step in [Process of Usage Collection on page 76](#).

### ***To enable and configure system preferences for Usage Collection***

- Refer to [Table 7](#) and to the section that discusses setting system preferences in *Siebel Applications Administration Guide*.

## **Reviewing the Usage-Tracking Log Files**

Usage-tracking log files are written to the directory that you specify in the system preferences. The log files are named:

SiebelUsageTracking\_*HOST\_PID\_YYYY-MM-DD\_HH.FF*

Where:

- *HOST* = Server host name
- *PID* = Process ID of the AOM
- *YYYY-MM-DD-HH* = Formatted date and time
- *FF* = File format (XML, W3C, or CSV)

For example, SiebelUsageTracking\_sshost\_2624\_2004-03-15\_16.XML is the log file begun at 4 P.M. on March 15, 2004.

**NOTE:** Log files are not created for periods when there is no activity. For example, if UsageTracking Log Time Period = Hourly but there are no users from 1:15 A.M. to 4:55 A.M., log files are not created for the 2 A.M. or 3 A.M. hours.

Table 8. Data Written to Usage-Tracking Log Files

| Data Column           | Comments  |
|-----------------------|---|
| User                  | User's login ID   |
| IP                    | IP address of the session   |
| Session ID            | Unique ID for the session   |
| Type                  | Four possible values:<br><ul style="list-style-type: none"> <li>■ MM Page — Indicates viewing of a microsite page</li> <li>■ GN Article — Indicates viewing of a group news article</li> <li>■ CB Asset — Indicates downloading of a content asset</li> <li>■ ViewActivated — Indicates viewing a view in the Siebel application</li> </ul> |
| Row ID                | Data row ID of the microsite page, group news article, or content asset   |
| Name                  | The name of the microsite page, group news article, content asset, or view  |
| Event Start Date Time | The time the user clicked on the item   |
| Event End Date Time   | The time of the user's next event   |
| Status                | Indicates success   |

This task is a step in [Process of Usage Collection on page 76](#).

### ***To review usage-tracking log files***

- 1** Open or import the log files in your reporting tool of choice.
- 2** Purge log files when necessary.





# 6

## Managing Group News

This chapter describes the how to set up and manage Group News authoring. Using Group News, an organization's news authors and content managers can create, edit, approve, preview, and publish real-time news content within the Siebel application.

This chapter includes the following topics:

- ["Scenario for Group News" on page 81](#)
- ["Process of Managing Group News" on page 82](#)
- ["Setting Up News Administrators, Authors, and Approvers" on page 83](#)
- ["Setting Up the Group News Approver Workflow" on page 84](#)
- ["Creating a Content Path" on page 85](#)
- ["Creating Stages for a Group News Content Path" on page 86](#)
- ["Designating Group News Approvers" on page 87](#)
- ["Setting Up Access to Group News" on page 87](#)
- ["Managing Versions and Publishing from the All News Stories List" on page 88](#)
- ["Creating a News Story \(End User\)" on page 88](#)
- ["Previewing a News Story \(End User\)" on page 92](#)
- ["Submitting a News Story for Approval \(End User\)" on page 92](#)
- ["Approving a News Story \(End User\)" on page 92](#)

### Scenario for Group News

This scenario provides an example of a process performed by the Group News administrator, content manager, and approver. Your company may follow a different process according to its business requirements.

#### Administrator

The top executive at an organization decides that important company news stories should originate in the Top Story section on the company's Home Page and then move to the Feature Articles section on day two and the Archive section on day three.

This business requirement is communicated to the Group News administrator responsible for creating content paths. As part of the content path creation process, the news administrator designates authors and approvers through responsibilities, determines the approver workflow, the set of approvers, and the employee access groups that have visibility rights to the news story.

After the content paths are created, the news administrator defines three stages, one for each of the sections in which a news story associated with this content path is published—Top Story, Feature Articles, and News Archive.

### Content Manager

An Alliances Content Manager has been asked to write a news story describing an important new partnership. To publish a news story, the content manager creates the news story record and selects a content path. The author then creates the news story content, previews the content, and submits the story for approval. On the go-live date, the story appears in the Top Story section on the Alliance Microsite and then in the Feature Articles section on the Sales Microsite.

### Approver

The Vice President of Alliances is the first approver in the Alliances content path selected by the content manager. After the manager submits the news story, the Vice President of Alliances receives it in her inbox. The approver reviews the news story, makes edits as appropriate (edits and comments are automatically cataloged in Version Control) and submits it for the second approver's review. If the second approver approves the story and the go-live date associated with the news article has passed, the story is immediately published and visible to employees.

### Employee

An employee visits the Sales Microsite. The employee sees only those articles that are approved and for which the employee has been given visibility rights. In the Top Story section, the employee clicks on the link to the full story and reads the latest news about the new partnership.

## Process of Managing Group News

The following list shows the procedures that administrators and employees typically perform to set up and use Group News. Your company may follow a different process according to its business requirements.

### Administrator Procedures

To set up Group News, perform the following procedures:

- 1 ["Setting Up News Administrators, Authors, and Approvers" on page 83](#)
- 2 ["Setting Up the Group News Approver Workflow" on page 84](#)
- 3 ["Creating a Content Path" on page 85](#)
- 4 ["Creating Stages for a Group News Content Path" on page 86](#)
- 5 ["Designating Group News Approvers" on page 87](#)
- 6 ["Setting Up Access to Group News" on page 87](#)
- 7 ["Managing Versions and Publishing from the All News Stories List" on page 88](#)

## End-User Procedures

To use Group News, perform the following procedures:

- 1 "Creating a News Story (End User)" on page 88
- 2 "Previewing a News Story (End User)" on page 92
- 3 "Submitting a News Story for Approval (End User)" on page 92
- 4 "Approving a News Story (End User)" on page 92

## Setting Up News Administrators, Authors, and Approvers

As an administrator, you assign responsibilities to other administrators, content managers and authors, allowing these users to author and approve news stories and access views.

Your Siebel application is preconfigured with several responsibilities specific to Group News, which organizations can use to set up Group News users. [Table 9](#) describes the preconfigured Group News responsibilities.

This task is a step in ["Process of Managing Group News" on page 82](#).

Table 9. Preconfigured Group News Responsibilities

| Responsibility               | Comments   |
|------------------------------|--|
| ERM Group News Administrator | <p>Users with the Group News Administrator responsibility can access the Group News Administration views and can perform the following procedures:</p> <ul style="list-style-type: none"> <li>■ Create a content path, which includes selecting an approver workflow, defining content stages, assigning approvers, and designating access groups.</li> <li>■ Edit submitted or completed news stories.</li> </ul> |
| Content Manager              | Users with the Content Manager responsibility can access the Group News Authoring views and can author and approve news stories. An ERM Content Manager can approve a specific news story only if the manager is designated as an approver for the content path associated with the news story.  |
| ERM Manager                  | Users with the ERM Manager or ERM User responsibility can access the News Archive on myPage and departmental portal pages.   |
| ERM User                     | Users with the ERM Manager or ERM User responsibility can access the News Archive on myPage and departmental portal pages.   |

### *To set up Group News responsibilities*

- 1 From the application-level menu, choose Navigate > Site Map > Administration - Application > Responsibilities.
- 2 In the Responsibilities list, select the responsibility.  
**NOTE:** The Views and Users lists at the bottom of the screen list users assigned to the selected responsibility, and the views the user can access. You can add or remove views associated with a responsibility according to your organization's needs, or you can create a new responsibility. For more information on creating and modifying responsibilities, see the *Siebel Security Guide*.
- 3 In the Users list, click Add, and query to find the user you want to add.  
The user you add is associated with the Group News responsibility you selected.
- 4 In the Views list, review the list of views that the user can access, and modify as needed.  
For example, you can remove views by selecting the view and clicking delete or designate the views as read-only by selecting the Read-Only View check box.

## Setting Up the Group News Approver Workflow

You can define approver workflow processes for Group News content. The approver workflow process determines the way the Siebel application handles content associated with the workflow. Siebel Group News is preconfigured with a Group News workflow that has two approval levels. This workflow allows Siebel to automatically send content from the creator, to the first-level approver, then to the second-level approver, and finally to the appropriate page views for publishing. At each point in the workflow process the content can be modified or approved. Approver workflows streamline the approval process, helping news authors to publish time-sensitive content for immediate employee review.

You can use the preconfigured workflow titled Group News Approver Workflow or you can create a new workflow. For more information about workflow modification and creation, see *Siebel Business Process Framework: Workflow Guide*.

This task is a step in ["Process of Managing Group News" on page 82](#).

### *To set up a Group News workflow*

- 1 From the application-level menu, choose Navigate > Site Map > Administration - Business Process > Workflow Processes.
- 2 In the Workflow Processes list, query to find \*Group News\*.
- 3 Select the Group News approver workflow process you want to use.  
(For example, Group News Multiple Approver Workflow.)

- 4 In the Status field, verify that the workflow is Active.

**NOTE:** To create a workflow with additional levels of approval, copy the existing Group News Approver Workflow and add the additional business processes as needed. For more information about creating and modifying workflows, see *Siebel Business Process Framework: Workflow Guide*.

## Creating a Content Path

Setting up a Content Path allows news authors to automate many of the processes associated with publishing a news story. Group News administrators create content paths in the Group News Administration views; news authors associate content paths with news stories.

A Content Path defines a set of attributes for the news stories associated with the Content Path. These attributes include:

- Where and when the news story is published (stages).
- The individuals responsible for editing and approving the news story (approvers workflow).
- The business process that automates the approval process (approver workflow).
- The groups of users that have visibility rights to the news story (access groups).
- The format in which the news story is published.
- Whether the news story should be archived.

This task is a step in [“Process of Managing Group News” on page 82](#).

### To create a content path

- 1 From the application-level menu, choose Navigate > Site Map > Administration - Group News > Content Path.
- 2 In the Content Path list, add a new record, complete the fields, and save the record.

Some fields are described in the following table.

| Field    | Comments  |
|----------|---|
| Name     | The name of the content path.   |
| Workflow | The appropriate Group News workflow approver process. When selecting the workflow process, make sure its status is Active. If the workflow process is not active, authors cannot select it when creating a news story. For more information, see <i>Siebel Business Process Framework: Workflow Guide</i> . |
| Status   | The status of a new content path is automatically set to Inactive. Setting the status to Active allows authors to select the content path when they create a story.   |

| Field        | Comments   |
|--------------|--|
| Private Flag | The Private Flag is selected by default, restricting the visibility of the Content Path to certain groups. Clear the Private Flag check box if the content can be viewed by all employees. |
| Description  | Description of the content path. Include information on which access groups are receiving the content.   |

## Creating Stages for a Group News Content Path

A stage determines where and when a news story is published. As an administrator, you can create content paths with multiple stages. Authors can then select a multiple-stage content path to publish a news story in different locations at previously specified times.

This task is a step in [“Process of Managing Group News” on page 82](#).

### *To create the stages for the content path*

- 1 From the application-level menu, choose **Navigate > Site Map > Administration - Group News > Content Path**.
- 2 In the Content Path list, select the content path record, and then click the Stages view tab.
- 3 In the Stages list, add a new record and complete the fields.

Some fields are described in the following table.

| Field       | Comments   |
|-------------|--|
| Page        | The Siebel Microsite page that displays the content. For more information on Microsite Management, see <a href="#">Chapter 4, “Microsite Management.”</a>  |
| View        | The Microsite page view on which the content appears.  |
| Section     | The section on a page for the content. The Section field shows the available sections in the Siebel application. You should make sure that the section you select is an active section on the selected view.             |
| Start Day   | The publication date for the stage. This date is set in conjunction with the go-live date specified by the author. For example, to publish a news story during the selected stage on the go-live date, enter 0.          |
| End Day     | The expiration date for the stage. This date is set in conjunction with the go-live date specified by the author. For example, to remove a news story from the selected stage five days after the go-live date, enter 5. |
| Description | A brief description of the stage.  |

## Designating Group News Approvers

The Group News Approver workflow that you create allows you to automatically send content from the creator to the first-level approver, and then to the second-level approver.

When setting up approvers, make sure that the number of approvers entered in the Approvers list equals the number of approvers required by the selected approver workflow. If you select fewer approvers than required by the approver workflow, the news story is not routed for approvals or published. If you select more approvers than required by the approver workflow, the news story is not routed to all of the approvers.

This task is a step in [“Process of Managing Group News” on page 82](#).

### *To select the Group News approvers*

- 1 From the application-level menu, choose Navigate > Site Map > Administration - Group News > Content Path.
- 2 In the Content Path list, select the content path, and then click the Approvers view tab.
- 3 In the Approvers list, add a new record, and then complete the fields.
  - a In the Position field, query for the position associated with the employee designated as an approver.
  - b In the Sequence Number field, enter a sequence number for the approver.

The sequence number indicates the order in which approvers approve the news story. The first approver has a sequence number of 1.

Repeat this procedure for each approver level in the selected workflow.

## Setting Up Access to Group News

You can establish which employee groups have visibility rights to the news story using the Content Path screen's Access Groups view tab.

This task is a step in [“Process of Managing Group News” on page 82](#).

### *To set up access to news*

- 1 From the application-level menu, choose Navigate > Site Map > Administration - Group News > Content Path.
- 2 In the Content Path list, query to find the content path you want to modify.
- 3 In the content path record, verify that the Private Flag field check box is selected and in the Status field, select Active from the drop-down list.

A status of Active allows news authors to access the content path.

- 4 Click the Access Groups view tab, and then in the Access Groups list, add a record and complete the fields.

Repeat this step for each access group you want to add.

## Managing Versions and Publishing from the All News Stories List

As an administrator, you can manage the versions of a news story, reviewing the version history, previewing previous versions of a story, and, if desired, restoring a previous version of a news story.

You can also perform one-click publication of a news story from the All News list, moving the story directly from the staging database environment to the production database environment.

This task is a step in [“Process of Managing Group News” on page 82](#).

### *To publish a story*

- 1 From the application-level menu, choose Navigate > Site Map > Administration - Group News > All News.
- 2 In the News Stories list, select the news story, and click Publish.

### *To view a version history and preview the news story*

- 1 From the application-level menu, choose Navigate > Site Map > Administration - Group News > All News.
- 2 In the All News List, select the news story, and then click the Versions view tab.
- 3 In the Versions list, select the version, and then click Preview.

The sequence of versions is listed in the Version # field.

### *To restore a previous version of the news story*

- 1 From the application-level menu, choose Navigate > Site Map > Administration - Group News > All News.
- 2 In the All News List, select the news story, and then click the Versions view tab.
- 3 In the Versions list, select the version, and then click Restore.

## Creating a News Story (End User)

The Siebel Group News module allows organizations to publish news stories in one of the following formats:

- **Top Story.** News published to this section appears as a large abstract with a large graphic and a link to the full story.



- **Feature Articles.** News published to this section appears as a small abstract with a small graphic and a link to the full story.
- **Today's Headlines.** News published to this section appears as a link to the full story.
- **My News.** News published to this section appears as an abstract with a small graphic and a link to the full story.
- **News Archive.** News published to this section appears as a small abstract with a small graphic and a link to the full story. In the News Archive form, end users can query for articles based on user-specified search criterion.

Authors can publish news in the Top Story, Feature Articles and Today's Headlines sections on the Home Page or on any of the Microsite pages. The My News and News Archive sections are located on the myPage.

This task is a step in ["Process of Managing Group News" on page 82.](#)

### Related Topics

["Creating Content for a News Story" on page 90](#)

["Importing a News Story" on page 91](#)

### To create a news story

- 1 From the application-level menu, choose Navigate > Site Map > Group News Authoring > News Inbox.
- 2 In the More Info form, click New and then complete the fields.

The sections in the Information form are numbered according to the logical task flow. For example, in Section 1, the author defines the headline and byline for the new story.

Some fields are described in the following table.

| Field        | Comments   |
|--------------|--|
| Name         | The name for the news story. The name is not visible to readers.   |
| Headline     | The headline for the news story, as it appears to readers.   |
| By-Line      | The byline for the story, as it appears to readers.  |
| Author       | The name of the author. This field defaults to the current user and is not visible to news story readers.  |
| Department   | The department of the author or news story.  |
| Region       | The region of the author or news story.  |
| Content Path | The content path associated with the news story.   |
| Go-Live Date | The date on which the content is activated. This field defaults to the current date and time. The value in this field is also used in combination with the content path Start Day and End Day values to further define the period that content becomes active. |

| Field         | Comments   |
|---------------|--|
| Approver Name | The approver field is automatically populated when there is an approver specified by the content path. The user sees the current pending approver.   |
| Content Type  | The priority of the news story. The content type can be used internally to help categorize news stories by priority level. The content type does not affect the appearance of the news story to readers. |

## Creating Content for a News Story

After the news story is created, authors can enter and edit content for the story, or import content that was previously created in an external HTML editor.

This task is a step in [“Process of Managing Group News” on page 82](#).

### To create the content for the news story

- 1 From the application-level menu, choose Navigate > Site Map > Group News Authoring > News Inbox.
- 2 In the News Stories list, select a news story, and then click the Content Editing view tab.
- 3 In the Content Editing form, enter the news story content, and set the status.

When you click in the Content Editor field, the integrated HTML editor toolbar appears at the bottom of the field. The toolbar provides special editing controls, which allow you to use supported HTML formatting and standard editing features. For more information, see *Siebel Fundamentals*.

- 4 Complete the remaining fields as needed.

Depending on the content path selected for the news story, some fields may not be required. A Top Story, for example, uses the Long Abstract and Large Image fields. Feature Articles and My News stories use the Small Image and Short Abstract fields. Today's Headlines stories do not use the abstract or image fields.

Some fields are described in the following table.

| Field          | Comments  |
|----------------|---|
| Large Image    | A large image for news stories that are published in the Top Story section.                       |
| Long Abstract  | A long abstract for news stories that are published in the Top Story section.                     |
| Short Abstract | A short abstract for news stories that are published in the Feature Articles or My News sections. |
| Small Image    | A small image for news stories that are published in the Feature Articles or My News sections.    |

**Related Topic**

[“Creating a News Story \(End User\)” on page 88](#)

## Importing a News Story

Authors and approvers can import news stories and associated graphics at the same time, and then modify the content using the Content Editor.

You can use the Insert File and the Insert Image tools to insert files (such as HTML files, MS Word files, and Adobe Acrobat files) and graphics files from your local file system, from shared networks and from the Web. For more information, see [Chapter 4, “Microsite Management.”](#)

This task is a step in [“Process of Managing Group News” on page 82.](#)

***To import a news story***

- 1 From the application-level menu, choose Navigate > Site Map > Group News Authoring > News Inbox.
- 2 In the More Info form, click New and then complete the fields.
- 3 Click the Content Editing view tab, and then in the Content Editing form, click Import Article.
- 4 In the Pick Content dialog box, click New.
- 5 In the Insert Content dialog box, complete the fields and then click Advanced to see more fields. Some fields are described in the following table.

| Field        | Comments  |
|--------------|---|
| Comments     | Type additional comments to describe the content.   |
| Content Type | Specify the type of content you are adding. A list of available types appears when you click the select button. |
| Filename     | Browse to the content you want to import.   |
| Lock         | A check mark in this field indicates that the content cannot be edited.   |
| Name         | Specify the name to use to be saved in Siebel Content Base.   |
| Title        | Specify the title to be saved in Siebel Content Base.   |
| URL          | Specify the URL that references the content you are importing.  |

- 6 Click OK in the Insert Content dialog box, and then click OK again in the Pick Content dialog box.

**Related Topics**

[“Creating Content for a News Story” on page 90](#)

[“Creating a News Story \(End User\)” on page 88](#)

## Previewing a News Story (End User)

To view the news story before routing it for approval, use the Preview view tab in the Group News Authoring screen.

This task is a step in [“Process of Managing Group News” on page 82](#).

### *To preview the news story*

- 1 From the application-level menu, choose Navigate > Site Map > Group News Authoring > News Inbox.
- 2 In the News Stories list, select the news story, and then click the Preview view tab.
- 3 In the Preview view, click the news story headline link to view the content.

## Submitting a News Story for Approval (End User)

After a news story is complete, the news author submits it for approval. The news story immediately appears in the first approver's News Inbox according to the approver workflow associated with the news story.

This task is a step in [“Process of Managing Group News” on page 82](#).

### *To submit a news story for approval*

- 1 From the application-level menu, choose Navigate > Site Map > Group News Authoring > News Inbox.
- 2 In the News Stories list, select the news story you want to submit, and then click the Content Editing view tab.
- 3 In the Content form, change the value in the Status field to Submitted.

## Approving a News Story (End User)

News approvers must have the Content Manager responsibility. Approvers access news stories that require their approval by navigating to their news inboxes in the Group News Authoring screen.

This task is a step in [“Process of Managing Group News” on page 82](#).

### *To approve a news story*

- 1 From the application-level menu, choose Navigate > Site Map > Group News Authoring > News Inbox.
- 2 In the News Stories list, select the news story you want to approve.

- 3 Click the Content Editing view tab, and change the value in the Status field to Approved.



# 7

## Setting Up Content Services

Siebel Content Services is a news and company information subscription service that is already integrated with Siebel ERM.

Siebel Content Services presents personalized external news about selected accounts, competitors, industries, and customizable subscription topics that are most relevant to your business and each individual employee's job. Business news and company profiles are integrated, filtered, and presented in context for each employee and combined with relevant company internal data drawn from the Siebel customer database. Using a process that maps businesses directly to news sources, Content Services provides only the relevant news topics for businesses, such as your customers, competitors, prospects, and partners.

This chapter describes the administration procedures necessary to add industry news content to a Siebel application. It includes the following topics:

- ["Scenario for Content Services" on page 95](#)
- ["Process of Setting Up Content Services" on page 96](#)
- ["Assignment of News Topic Administrator Responsibilities" on page 97](#)
- ["Creation of Access Groups for Content News Services" on page 97](#)
- ["Setting Up Content Services Host and Authentication Credentials" on page 98](#)
- ["Creating a News Package" on page 99](#)
- ["Management of News Topics" on page 100](#)
- ["Retrieving Account and Competitor News for Briefings" on page 102](#)
- ["Associating Accounts and Competitors with News Topics" on page 103](#)
- ["Associating Your Company with a News Topic" on page 104](#)
- ["D & B Account Rationalization Services and News Topics" on page 105](#)
- ["Viewing a Tracking Profile Summary for News \(End User\)" on page 105](#)
- ["Creating a User-Defined News Topic \(End User\)" on page 106](#)
- ["Previewing a News Topic \(End User\)" on page 107](#)
- ["Resolving Problems with Content Services" on page 107](#)

### Scenario for Content Services

This scenario provides an example of a process typically performed by an administrator, a topic manager, and end users. Your company may follow a different process according to its business requirements.

### Administrator

A financial organization using Siebel ERM has signed a contract with a new client, a large software company. The representatives in client services, who are responsible for supporting the new client, send a request to the news topic manager to create a news topic for the client.

Because the new client is a computer software company, the administrator creates the news topic within the High Technology news package. The administrator also creates a new access group and assigns the appropriate client service representatives to the group.

### End User

After the account topic is created, the client service representatives modify their tracking profiles to include the newly created news topic.

## Process of Setting Up Content Services

This section lists procedures typically performed by administrators and end users to set up and use Content Services. Your company may follow a different process according to its business requirements.

### Administrator Procedures

To set up content services, perform the following procedures:

- 1 [“Assignment of News Topic Administrator Responsibilities” on page 97](#)
- 2 [“Creation of Access Groups for Content News Services” on page 97](#)
- 3 [“Setting Up Content Services Host and Authentication Credentials” on page 98](#)
- 4 [“Creating a News Package” on page 99](#)
- 5 [“Management of News Topics” on page 100](#)
- 6 [“Retrieving Account and Competitor News for Briefings” on page 102](#)
- 7 [“Associating Accounts and Competitors with News Topics” on page 103](#)
- 8 [“Associating Your Company with a News Topic” on page 104](#)
- 9 [“Resolving Problems with Content Services” on page 107](#)

### End-User Procedures

To use content services, perform the following procedures:

- 1 [“Viewing a Tracking Profile Summary for News \(End User\)” on page 105](#)
- 2 [“Creating a User-Defined News Topic \(End User\)” on page 106](#)



## Assignment of News Topic Administrator Responsibilities

Before a topic manager can administer the user- or administrator-defined content in Siebel Content Services, the employee must be associated with the appropriate responsibilities. You can assign employees additional responsibilities that allow the employees to administer news topics.

To set up a news topic administrator, create a responsibility that provides access to the News Topics Manager screen, and associate it with the appropriate employee. For more information on creating employee responsibilities, see *Siebel Security Guide* and *Siebel Applications Administration Guide*.

### Related Topic

["Process of Setting Up Content Services" on page 96](#)

## Creation of Access Groups for Content News Services

Before you configure or create a news topic, consider which groups within your organization should have access to news services provided by Content Services. For example, if your organization has purchased seats of Content Services for a subset of employees, only those employees should have access to the external content.

In addition, depending on the employee's role in an organization or the types of clients with which the employee works, an employee may need access to certain industry sources and content topics. Rather than configure topics within Content Services so that the topics are visible to any user, you can configure content so that it is visible to specific groups of users.

You must associate an access group with a news package when you set up the package. As a result, you should create the appropriate access groups for your topics before you set up Content Services.

You should complete the following general procedures before setting up Content Services:

- 1 Make a list of each organization requesting access to each news package. For example, specific industry sources and content topics.
- 2 Create an access group for each news package, unless an appropriate group already exists.
- 3 Associate employees with the access groups used for Content Services.

**NOTE:** When setting up a news package, use these access groups to target the package to a specific group of users.

For more information about setting up access groups, see *Siebel Security Guide*.

### Related Topic

["Process of Setting Up Content Services" on page 96](#)

## Setting Up Content Services Host and Authentication Credentials

During Siebel Server installation, the administrator installing the application is asked to specify if the organization has purchased Siebel ERM, Siebel ERM and Siebel Content Services, or neither. When you select Siebel ERM or Siebel ERM and Siebel Content Services, you are asked to enter the assigned content host name, user name, and password that allows you to access the Siebel application-hosted data. Siebel application-hosted data consists of company profiles, corporation relationship information, premium external news feeds, and productivity content from leading content producers and providers. You can also edit these parameters within the application using the following procedures.

**NOTE:** The host name, user name, and password credentials are provided in the license key letter distributed to each customer after purchase.

This task is a step in [“Process of Setting Up Content Services” on page 96](#).

### *To set up Content Services host and authentication credentials*

- 1 From the application-level menu, choose **Navigate > Site Map > Administration - Integration > WI Symbolic URL List**.

The Fixup Administration list appears.

- 2 From the visibility filter, select **Host Administration**.
- 3 In the Host Administration list, create a new record and complete the fields. (You can also modify the default entry in the host table.)

Some fields are described in the following table.

| Field                | Comments  |
|----------------------|---|
| Name                 | Provide a name for the external host. Change the host entry [ServerName] to the Content Services host name provided in your license key letter. |
| Virtual Name         | A virtual name for the external host. This information is provided in your license key letter.  |
| Authentication Type  | Set authentication type to NCSA Basic.  |
| Authentication Value | Enter the authentication value in the format <i>username:password</i> as shown in your license key letter.                                      |

- 4 Restart your server.

## Creating a News Package

A news package is a subscription to a collection of third-party content sources offered by Siebel Content Services. Your organization may subscribe to several news packages in several different languages. For example, your organization may subscribe to general sources in French, English, or Spanish languages or to specific sources for your industry, such as Finance, High Technology, and Life Sciences. You must set up your Siebel application to include content from the news packages to which you subscribe.

This task is a step in ["Process of Setting Up Content Services" on page 96](#).

### *To create a news package*

- 1 From the application-level menu, choose **Navigate > Site Map > Administration - Briefings > News Topic Manager**.
- 2 In the News Packages list, create a news package record, and complete the fields.

Some fields are described in the following table.

| Field        | Comments   |
|--------------|--|
| Name         | The name for the external news package. It is recommended that you use the package name provided in your license key letter.                             |
| Inactive     | A check mark in this field indicates that the news package is not available to employees.  |
| Parameter    | This parameter indicates to the Siebel Server the precise content to retrieve. Enter the parameter exactly as it is provided in your license key letter. |
| Access Group | The groups that have access to the news package.   |

After you set up a news package, you can create the news topics. For more information on creating a news topic, see ["Management of News Topics" on page 100](#).

## Management of News Topics

A news topic is a set of search criteria used to find current news on topics of interest within a news package. [Table 10](#) describes the types of news topics available in Siebel Content Services.

Table 10. Siebel Content Services News Topic Types

| News Topic Type       | Comments   |
|-----------------------|--|
| Administrator-Defined | Siebel Content Services allows you to create news topics based on the criteria you specify. News topics that you create in the Administrator-Defined view are available to employees within the access groups associated with the news group. Employees with access to the selected news group can choose to include the news topic on a personalized view in the Siebel application.  |
| Predefined            | Siebel Content Services delivers a predefined set of search topics that allow end users to receive current news on topics of interest to them (based on their tracking profile selections). Search topics include headline news, local and regional news, industry news, business topics, sports, health, and more. The search criteria for predefined topics cannot be modified. The topics can only be inactivated or activated. If the topics are inactivated, they do not appear as choices for the end user in the My News Topics view. |
| User-Defined          | Siebel Content Services allows users who are associated with the appropriate news group to create news topics based on specified criteria. Administrators can view and manage news topics created by users in the User-Defined view.   |

### Related Topics

[“Process of Setting Up Content Services” on page 96](#)

[“Creating a News Topic” on page 100](#)

[“Editing a News Topic” on page 101](#)

[“Deactivating a News Topic” on page 102](#)

## Creating a News Topic

As an administrator, you can create, modify, and delete administrator- and user- defined news topics.

### *To create a news topic*

- 1 From the application-level menu, choose **Navigate > Site Map > Administration - Briefings > News Topic Manager**.
- 2 In the News Packages list, query to find the news package for which you want to create a news topic.

- 3 Click one of the following view tabs:
  - Administrator-Defined
  - User-Defined
- 4 In the News Topics list, add a new record and complete the fields.

Some fields are described in the following table.

| Field    | Comments   |
|----------|--|
| Name     | Enter an identifying name for the topic. Users see this text description in the Add News Topics form. If the user selects this news topic, this text also appears as a section heading in the My News section of the user's My Briefing page.  |
| Query    | Enter the query to be submitted in the news topic search. Queries can be expressed as simple words or strings, as is customary with advanced search syntaxes in most search engines. Multiple terms that do not contain a Boolean expression (AND, OR) are treated as a phrase. Boolean operators (AND, OR) are recognized. Quote marks can be used to demark a phrase. When an operator occurs within quotes it is treated as part of the phrase. For more information about how to query, see <i>Siebel Fundamentals</i> . |
| Inactive | <p>The check box is used to deactivate or activate the selected news topic. A check mark appears in this column when the news topic is inactive. Users can only select active news topics in their tracking profile.</p> <p>If you later mark a user-subscribed news topic as inactive, the user no longer sees news for that topic.</p>   |

- 5 Click Preview to see the topic's final format.

#### Related Topic

["Management of News Topics" on page 100](#)

## Editing a News Topic

Use the following procedure to edit a news topic.

#### *To edit a news topic*

- 1 From the application-level menu, choose Navigate > Site Map > Administration - Briefings > News Topic Manager.
- 2 In the News Packages list, query to find the news package associated with the news topic.
- 3 Click one of the following view tabs:
  - Administrator-Defined

- User-Defined

- 4 In the news topics list, query to find the news topic.
- 5 In the news topic record, modify the fields as needed.

### Related Topic

[“Management of News Topics” on page 100](#)

## Deactivating a News Topic

News topics are preconfigured as active. You can use the News Topic Manager screen to deactivate or activate news topics.

### *To deactivate a news topic*

- 1 From the application-level menu, choose Navigate > Site Map > Administration - Briefings > News Topic Manager.
- 2 In the News Packages list, query to find the news topic.
- 3 Click one of the following view tabs:
  - Administrator-Defined
  - Predefined
  - User-Defined
- 4 In the news topics list, query to find the news topic.
- 5 In the Inactive field, select the check box.

### Related Topic

[“Management of News Topics” on page 100](#)

## Retrieving Account and Competitor News for Briefings

Siebel Content Services allows you to include briefings about your accounts, competitors, other organizations, and so on, in your Siebel application. These briefings are retrieved from data within your Siebel application, as well as from external news sources based on your organization's subscriptions with Siebel Content Services.

As an administrator you can create account topics, which are used to associate your Siebel accounts and competitors with external content. You also can associate your organization with a news topic to display company news on the My Briefings page.

Your Siebel application can use the account topics you create to search Siebel Content Services for information about your accounts and competitors.

Your Siebel application uses D&B as its standard for company topics. You use the Account Topic Manager to associate accounts and competitors to D-U-N-S numbers. D-U-N-S numbers are a standard way for external content providers to index company information. If you search using an indexed term, such as the D-U-N-S number, rather than a more generic search term, such as company name, then your search results are more likely to be accurate and relevant.

**NOTE:** D-U-N-S numbers that have been assigned and populated to an account do not always appear. To find out if the D-U-N-S has been assigned, click the drop-down list for the DUNS field. If the D-U-N-S record has already been assigned, it appears in this drop-down list. Click OK and the D-U-N-S record appears in the field.

By associating your accounts and competitors with topics, you also gain access to Siebel Company Vocabulary, which provides access to other common company identifiers, such as its stock ticker symbol. This gives you the ability to configure portal agents to submit different search terms to different content providers—for example, the D-U-N-S number to one content provider or the stock ticker symbol to another.

You can associate multiple accounts from your Siebel database to a single topic. This is an appropriate section when external content services consider several accounts in your Siebel database as a single entity. For example, you can have several divisions of Acme, Inc. (Acme West, Acme East, and Acme South) listed as unique accounts in your Siebel database, while an external content provider may index news based on the parent company, Acme, Inc.

For more information about portal agents, see *Siebel Portal Framework Guide*. For more information about D-U-N-S numbers, see *Siebel Applications Administration Guide*.

#### Related Topic

[“Process of Setting Up Content Services” on page 96](#)

## Associating Accounts and Competitors with News Topics

For news and company information to appear on the My Briefing page, you must link accounts and competitors in your Siebel database to a topic. D-U-N-S numbers are the standard topics used by Siebel Content Services to identify companies. You link accounts and competitors to topics using the Account Topic Manager.

This task is a step in [“Process of Setting Up Content Services” on page 96](#)

### *To create or change a topic association*

- 1 From the application-level menu, choose **Navigate > Site Map > Administration - Briefings > Account Topic Manager**.

The accounts and competitors from your Siebel database appear in the Accounts list. Name and Location are read-only. If the company is marked as a Competitor in your Siebel database, there is a check mark in the Competitor column.

- 2 In the Accounts list, query for and select the account or competitor you want to associate with a topic.
- 3 In the Company Search form, query for the account or competitor name in the Company Name field.

Matching records from the Siebel Content Services company database (or your selected external content provider database) appear. For example, you might see multiple listings of a company because each location or subsidiary might have its own D-U-N-S number assigned to allow specific searches on that location or subsidiary.

- 4 In the search results list, choose the specific company you want to define for your account or competitor, and click **Assign DUNS**.

The corresponding company name and D-U-N-S number are entered in the Accounts list for the record that was previously selected.

**NOTE:** If your company has purchased Siebel Content Services, you can click the **Company Briefing** button on the Company Search form to retrieve a briefing on the selected company.

## Associating Your Company with a News Topic

To be able to receive news about your own company in the **Our Company** section of the **My Briefing** page, you must associate your company with a topic. To perform this procedure using the **Account Topic Manager**, you associate a record called **Our Company** with your company's D-U-N-S number.

This task is a step in ["Process of Setting Up Content Services" on page 96](#).

### *To associate a topic with your company*

- 1 From the application-level menu, choose **Navigate > Site Map > Administration - Briefings > Account Topic Manager**.
- 2 In the Accounts list, query for and select the account or competitor you want to associate with a topic.
- 3 In the Company Search list, query for the account or competitor name in the Company Name field.



- 4 In the search results list, choose the specific company you want to define for your account or competitor, and then click Assign DUNS.

The corresponding company name and D-U-N-S number are entered in the Accounts list for the record that was previously selected.

**NOTE:** If there is no company news available, the Our Company in the News section does not appear.

## D & B Account Rationalization Services and News Topics

The D&B Account Rationalization Services automates the association of accounts and topics by matching your account records to D-U-N-S numbers in batch. A link to D&B's Web site appears on the Account Topic Manager view.

For more information, see *Siebel Applications Administration Guide*.

### Related Topic

["Process of Setting Up Content Services" on page 96](#)

## Viewing a Tracking Profile Summary for News (End User)

Users can view a summary of the tracking profile that determines what news they see.

This task is a step in ["Process of Setting Up Content Services" on page 96](#).

### *To view a tracking profile summary*

- 1 Navigate to the Profile screen > Summary page.

- On the Summary page, view news selections.

The following figure shows an example of a tracking profile summary, with the left navigation bar showing links to news topics, weather, accounts, competitors and so on.

- Click the links in the navigation bar to view additional information.

## Creating a User-Defined News Topic (End User)

Users can customize the news topics that appear on their Home Page.

This task is a step in [“Process of Setting Up Content Services” on page 96](#).

### *To create user-defined news topics*

- Navigate to the Profile screen > Summary page.
- From the Summary page, click the News Topics link in the navigation bar.
- From the News Packages form, click the User Defined view tab, and then click New.
- Enter a name for the query and the query string.  
For example, enter the name UAN, and the Universal Application Network query string.
- In the list, select the news topic, and then click Select Topic to move the topic to the My Selected News Topic section.

The user-defined news topic appears the next time the user logs in.

## Previewing a News Topic (End User)

After a news topic has been defined, the user can preview the news topic.

This task is a step in [“Process of Setting Up Content Services” on page 96](#).

### *To preview a news topic*

- 1 Navigate to the Profile screen > Summary page.
- 2 From the tracking profile Summary, click the News Topics link in the navigation bar.
- 3 Click either the User Defined view tab, or the Predefined and Administrator Defined view tab.
- 4 Click Preview to view the news.

The previewed news also appears by default on the Home Page when the user logs into the application.

## Resolving Problems with Content Services

The topics in this section provide information that may lead to a resolution when investigating problems with Content Services.

- [“External News and Data Do Not Appear on Home Page” on page 107](#)
- [“News Does Not Appear in the Our Company Section” on page 109](#)
- [“Not Found Error in the Siebel Mobile Web Client” on page 109](#)
- [“Users Receive Too Much News” on page 109](#)
- [“Literature and Bulletins Are Out of Date” on page 110](#)

### **Related Topic**

[“Process of Setting Up Content Services” on page 96](#)

## External News and Data Do Not Appear on Home Page

Your company has purchased Siebel Content Services and you are able to access the Web from your workstation, but you do not receive external news and data on the home page. In this example, the problem may be that a proxy server is being used to insulate your network from the Internet and is not allowing the Siebel application to pass requests through and return data to the application.

### **Related Topic**

[“Resolving Problems with Content Services” on page 107](#)

## Verifying Connectivity with Siebel Content Services Data Host

Verify connectivity with the Siebel Content Services data host using network utilities, such as ping, nslookup, and traceroute.

If you do not know the name of the Siebel Content Services data host, you can find it in the license key letter that Oracle sent to your company.

## Verifying Your Web Connection and User Credentials

Verify that you have a valid Web connection and that your Siebel Content Services credentials are valid.

### *To verify your Web connection and credentials*

**1** Open a Web browser on your Siebel server.

**2** Enter one of the following URLs:

- for Content customers:

`http://{eContent_hostname}/eContent/GetCompanyNames?FIND=Siebel`

Change {eContent\_hostname} to the name of your content host.

- for ContentBroker customers:

`http://{ContentBroker_hostname}/eContent/GetCompanyMID?FIND=Siebel`

Change {ContentBroker\_hostname} to the name of your content host.

A dialog box appears prompting you for your Siebel Content Services user credentials. You can find your user credentials in the license key letter that Oracle sent to your company.

**3** Enter your user credentials.

Company information about Oracle should appear. If it does, your user credentials are valid. Skip the next step.

If you receive an Access Denied message or other type of message, the proxy server may not be allowing access to the Internet.

**4** If you have received an error message, try to access the URL using a browser on a machine that does not go through the proxy server or firewall and repeat [Step 1](#) through [Step 3](#).

If company information about Oracle appears, then the problem lies with the Siebel server passing through the proxy server to retrieve data through the Internet. Contact your network administrators to resolve the issue.

## Verifying Server Configuration

If you could access the Siebel company information using the previous procedure, then the problem may be in the configuration settings for the proxy server or in the Siebel ERM server configuration files.

***To test your configuration settings***

- 1 Start the Siebel developer Web client in your browser.
- 2 Open a second browser window at the same time and enter the following URL:

```
http://localhost/start.swe?SWECmd=
GotoView&SWEView=SI+Com+Company+Briefing+View&MID=808856512
```

**NOTE:** URLs are case-sensitive.

- 3 Enter valid login credentials, and then click Login.

If external content does not appear, this indicates a configuration problem, either with the proxy server or within the server configuration file.

## News Does Not Appear in the Our Company Section

If news does not appear in the Our Company In The News section of the home page, but it does appear in other news sections, it is likely that you did not assign an account topic to the special “\_Our Company\_” record.

### Related Topics

[“Resolving Problems with Content Services” on page 107](#)

[“Retrieving Account and Competitor News for Briefings”](#)

## Not Found Error in the Siebel Mobile Web Client

If users receive a “404 Not Found” error after clicking Company Lookup in the Account Topic Manager, then the constructed external URL went to a valid host name but specified a URL path that does not exist. This usually indicates that a Symbolic URL is not correctly defined.

### Related Topic

[“Resolving Problems with Content Services” on page 107](#)

[“Setting Up Content Services Host and Authentication Credentials” on page 98](#)

## Users Receive Too Much News

If the amount of news and data that is published on a regular basis in the Siebel application becomes too large, you can change the number of days that news and data are published by changing the argument values in the Administration - Integration > Symbolic URL view. This reduces the amount of information that appears by removing older items.

The number of days for which articles are published is controlled by the HIST argument value in content agents. [Table 11](#) provides an example of the Symbolic URL HIST argument values.

Table 11. Symbolic URL HIST Argument

| Symbolic URL Name | URL                                   | Argument Name | Required | Sequence Number | Argument Type | Argument Value |
|-------------------|---------------------------------------|---------------|----------|-----------------|---------------|----------------|
| CompanyNews       | http://datahost/eContent/GetHeadlines | HIST          | N        | 1               | Constant      | 90             |

The default setting for HIST is 90 days.

You can also change the number of articles that appear. The number of articles that appear is controlled by the MAX argument value in content agents. [Table 12](#) provides an example of the Symbolic URL MAX argument values.

Table 12. Symbolic URL MAX Argument

| Symbolic URL Name | URL                                   | Argument Name | Required | Sequence Number | Argument Type | Argument Value |
|-------------------|---------------------------------------|---------------|----------|-----------------|---------------|----------------|
| CompanyNews       | http://datahost/eContent/GetHeadlines | MAX           | N        | 1               | Constant      | 20             |

The default setting for MAX is 20 days.

If users are receiving news and information about too many accounts or competitors, they can reduce their list of tracked accounts and competitors by modifying their tracking profiles.

#### Related Topic

[“Resolving Problems with Content Services” on page 107](#)

## Literature and Bulletins Are Out of Date

If a literature item or bulletin is no longer useful or it is replaced by a more recent version and the original item has not yet reached its expiration date, you can change the item's expiration date to the current date. This removes the item from the home page.

#### Related Topic

[“Resolving Problems with Content Services” on page 107](#)

# A

## Content Center Reference

This appendix provides detailed information on two subjects:

- [“Prebuilt Content Objects for Content Center” on page 111](#)
- [“Content Project Business Service” on page 123](#)

### Prebuilt Content Objects for Content Center

Each Content Object is based on a business object that was derived from an existing business object by removing unnecessary fields. You can modify these content objects according to your business needs.

[Table 13](#) lists each content object, the primary business object on which it is based, and its primary business component.

Table 13. Prebuilt Content Objects

| Content Object   | Business Object                          | Primary Business Component                    |
|--|--|---|
| <a href="#">Catalog Content Object</a>                   | Product Catalog<br>(Content Management)  | Product Catalog                               |
| <a href="#">Catalog Category Content Object</a>          | Catalog Category<br>(Content Management) | Catalog Category Admin                        |
| <a href="#">ContentBase Content Asset Content Object</a> | ContentBase Asset EAI                    | ContentBase Asset (Content Management)        |
| <a href="#">ContentBase Content Set Content Object</a>   | ContentBase Content Set EAI              | ContentBase Content Set (Content Management)  |
| <a href="#">ContentBase Content Type Content Object</a>  | ContentBase Content Type EAI             | ContentBase Content Type (Content Management) |
| <a href="#">ERM Group News Item Content Object</a>       | ERM Group News Item EAI                  | ERM Group News Item EAI                       |
| <a href="#">Literature Content Object</a>                | Admin Sales Tool<br>(Content Management) | Admin Sales Tool                              |
| <a href="#">Microsite Management Page Content Object</a> | ePortal MM Page EAI                      | ePortal MM Page EAI                           |

Table 13. Prebuilt Content Objects

| Content Object                                 | Business Object                               | Primary Business Component |
|--|---|----------------------------|
| <a href="#">Price List Content Object</a>      | ePortal MM Page Item EAI                      | ePortal MM Page Item EAI   |
| <a href="#">Price List Content Object</a>      | Price List (Content Management)               | Price List                 |
| <a href="#">Product Content Object</a>         | Product Admin Definition (Content Management) | Internal Product           |
| <a href="#">Product Class Content Object</a>   | XA Authoring Object                           | XA Class                   |
| <a href="#">Product Feature Content Object</a> | Product Feature (Content Management)          | Product Feature            |
| <a href="#">Product Line Content Object</a>    | Admin Product Line (Content Management)       | Admin Product Line         |
| <a href="#">Resolution Item Content Object</a> | Resolution Item                               | SR Resolution Item         |
| <a href="#">Solution Content Object</a>        | Solution                                      | Solution                   |
| <a href="#">Volume Discount Content Object</a> | Volume Discount (Content Management)          | Volume Discount            |

The tables below describe the data that is transferred for each business component that is included in the content object.

## Catalog Content Object

Catalog is a prebuilt content object based on the business object Product Catalog (Content Management). [Table 14](#) lists the business components for the prebuilt content object Catalog.

Table 14. Prebuilt Content Object: Catalog

| Business Components         | Transferred Data                             | Links                                       |
|-----------------------------|--|---|
| Product Catalog             | Catalog Information                          | Primary                                     |
| Product Catalog Translation | Language Translations of Catalog Information | Product Catalog/Product Catalog Translation |



## Catalog Category Content Object

Catalog Category is a prebuilt content object based on the business object Catalog Category. [Table 15](#) lists the business components for the prebuilt content object Catalog Category.

Table 15. Prebuilt Content Object: Catalog Category

| Business Components | Transferred Data          | Links                                |
|---------------------|---------------------------|--------------------------------------|
| Catalog Category    | Catalog Category          | Primary                              |
| Catalog Subcategory | Association relationships | Catalog Category/Catalog Subcategory |
| Internal Product    | Association relationships | Catalog Category/Internal Product    |

## ContentBase Content Asset Content Object

ContentBase Content Asset is a prebuilt content object based on the business object ContentBase Asset EAI. [Table 16](#) lists the business components for the prebuilt content object Content Asset.

Table 16. Prebuilt Content Object: ContentBase Content Asset

| Business Components                                    | Transferred Data                                 | Links   |
|--|--|---|
| ContentBase Asset (Content Management)                 | ContentBase Asset identity                       | Primary   |
| ContentBase Asset (Content Management)_Access Group    | ContentBase Access Group relationship            |   |
| ContentBase Asset (Content Management)_Current Version | ContentBase Asset current version identification |   |
| ContentBase Version (Content Management)               | Asset revision information                       | ContentBase Asset (Content Management)/ContentBase Version (Content Management)             |
| ContentBase Data (Content Management)                  | Content stored in database repository            | ContentBase Version (Content Management)/ContentBase Data (Content Management)              |
| ContentBase Namespace Aliases (Content Management)     | XML namespace information                        | ContentBase Version (Content Management)/ContentBase Namespace Aliases (Content Management) |

Table 16. Prebuilt Content Object: ContentBase Content Asset

| Business Components                                      | Transferred Data              | Links   |
|--|-------------------------------|---|
| ContentBase Version File Attachment (Content Management) | Content stored in file system | ContentBase Version (Content Management)/ContentBase Version File Attachment (Content Management) |
| ContentBase Version for Version Children                 | Asset version interrelations  | ContentBase Asset (Content Management)/ContentBase Version for Version Children                   |
| ContentBase Ref (Content Management)                     | Links to other assets         | ContentBase Version for Version Children/ContentBase Ref (Content Management)                     |

## ContentBase Content Set Content Object

ContentBase Content Set is a prebuilt content object based on the business object ContentBase Content Set EAI. [Table 17](#) lists the business components for the prebuilt content object ContentBase Content Set.

Table 17. Prebuilt Content Object: ContentBase Content Set

| Business Components                                    | Transferred Data                                 | Links   |
|--|--|---|
| ContentBase Content Set (Content Management)           | Set identity                                     | Primary   |
| ContentBase Content Set (Content Management)_Pr. Asset | Home page identification                         |   |
| ContentBase Asset (Content Management)                 | Asset identity                                   | ContentBase Content Set (Content Management)/ContentBase Asset (Content Management) |
| ContentBase Asset (Content Management)_Access Group    | ContentBase Access Group relationship            |   |
| ContentBase Asset (Content Management)_Current Version | ContentBase Asset current version identification |   |
| ContentBase Version (Content Management)               | Asset revision information                       | ContentBase Asset (Content Management)/ContentBase Version (Content Management)     |

Table 17. Prebuilt Content Object: ContentBase Content Set

| Business Components                                      | Transferred Data                      | Links   |
|--|---------------------------------------|---|
| ContentBase Data (Content Management)                    | Content stored in database repository | ContentBase Version (Content Management)/ContentBase Data (Content Management)                    |
| ContentBase Namespace Aliases (Content Management)       | XML namespace information             | ContentBase Version (Content Management)/ContentBase Namespace Aliases (Content Management)       |
| ContentBase Version File Attachment (Content Management) | Content stored in file system         | ContentBase Version (Content Management)/ContentBase Version File Attachment (Content Management) |
| ContentBase Version for Version Children                 | Asset version interrelations          | ContentBase Content Set (Content Management)/ContentBase Version for Version Children             |
| ContentBase Ref (Content Management)                     | Links to other assets                 | ContentBase Version for Version Children/ContentBase Ref (Content Management)                     |

## ContentBase Content Type Content Object

ContentBase Content Type is a prebuilt content object based on the business object ContentBase Content Type EAI. [Table 18](#) lists the business components for the prebuilt content object ContentBase Content Type.

Table 18. Prebuilt Content Object: ContentBase Content Type

| Business Components                           | Transferred Data            | Links  |
|---|-----------------------------|--|
| ContentBase Content Type (Content Management) | ContentBase Asset data type | Primary  |
| ContentBase DocType (Content Management)      | SGML document type          | ContentBase Content Type (Content Management)/ContentBase DocType (Content Management)   |
| ContentBase Namespace (Content Management)    | XML namespace information   | ContentBase Content Type (Content Management)/ContentBase Namespace (Content Management) |
| ContentBase NS Node Type (Content Management) | Namespace node information  | ContentBase Namespace (Content Management)/ContentBase NS Node Type (Content Management) |

## ERM Group News Item Content Object

ERM Group News Item is a prebuilt content object based on the business object ERM Group News Item EAI. [Table 19](#) lists the business components for the prebuilt content object ERM Group News Item.

Table 19. Prebuilt Content Object: ERM Group News Item

| Business Components                                    | Transferred Data                                 | Links   |
|--|--|---|
| ERM Group News Item EAI                                | News Item identity, content references           | Primary   |
| ERM Group News Content Path EAI                        | Publication stages for news item                 | ERM Group News Item EAI/ERM Group News Content Path EAI                             |
| ERM Group News Content Path Stages EAI                 | Publication stage details                        | ERM Group News Content Path EAI/ERM Group News Content Path Stages EAI              |
| ERM Group News Position EAI                            | Publication approvers for news item              | ERM Group News Content Path EAI/ERM Group News Position EAI                         |
| Access Group   | Contentbase Asset access groups                  | ContentBase Asset (Content Management)/Access Group                                 |
| ERM Group News Access Group Member EAI                 | Group News access group information              | Access Group/ERM Group News Access Group Member EAI                                 |
| ContentBase Content Set (Content Management)           | Set identity                                     | ERM Group News Item EAI/ContentBase Content Set (Content Management)                |
| ContentBase Content Set (Content Management)_Pr. Asset | Home page identification                         |   |
| ContentBase Asset (Content Management)                 | Asset identity                                   | ContentBase Content Set (Content Management)/ContentBase Asset (Content Management) |
| ContentBase Asset (Content Management)_Access Group    | ContentBase Access Group relationship            |   |
| ContentBase Asset (Content Management)_Current Version | ContentBase Asset current version identification |   |
| ContentBase Version (Content Management)               | Asset revision information                       | ContentBase Asset (Content Management)/ContentBase Version (Content Management)     |

Table 19. Prebuilt Content Object: ERM Group News Item

| Business Components                                      | Transferred Data                      | Links   |
|--|---------------------------------------|---|
| ContentBase Data (Content Management)                    | Content stored in database repository | ContentBase Version (Content Management)/ContentBase Data (Content Management)                    |
| ContentBase Namespace Aliases (Content Management)       | XML namespace information             | ContentBase Version (Content Management)/ContentBase Namespace Aliases (Content Management)       |
| ContentBase Version File Attachment (Content Management) | Content stored in file system         | ContentBase Version (Content Management)/ContentBase Version File Attachment (Content Management) |
| ContentBase Version for Version Children                 | Asset version interrelations          | ContentBase Content Set (Content Management)/ContentBase Version for Version Children             |
| ContentBase Ref (Content Management)                     | Links to other assets                 | ContentBase Version for Version Children/ContentBase Ref (Content Management)                     |

## Literature Content Object

Literature is a prebuilt content object based on the business object Admin Sales Tool. [Table 20](#) lists the business components for the prebuilt content object Literature.

Table 20. Prebuilt Content Object: Literature

| Business Components       | Transferred Data                       | Links   |
|---------------------------|--|---|
| Admin Sales Tool          | Literature record and associated files | Primary   |
| Literature Item           | Detailed relationships                 | Admin Sales Tool/Literature Item                  |
| Literature Component Item | Association relationships              | Literature Item/Literature Component Item - Admin |

## Microsite Management Page Content Object

Microsite Management Page is a prebuilt content object based on the business object ePortal MM Page EAI. [Table 21](#) lists the business components for the prebuilt content object Microsite Management Page.

Views associated with this content object are:

- Add/Edit - ePortal MM Page Administration

## ■ Preview - ePortal MM Page Designer View

Table 21. Prebuilt Content Object: Microsite Management Page

| Business Components                                    | Transferred Data                                 | Links  |
|--|--|--|
| ePortal MM Page Access Group Intersection              |  | ePortal MM Page EAI/ePortal MM Page Access Group Intersection                        |
| ePortal MM Item Access Group Intersection              |  | ePortal MM Page Item EAI/ePortal MM Item Access Group Intersection                   |
| ePortal MM Page EAI                                    | Page identity                                    | Primary  |
| ePortal MM Page Section EAI                            | Page layout information                          | ePortal MM Page EAI/ePortal MM Page Section EAI                                      |
| ePortal MM Page Template Section EAI                   |  | ePortal MM Page Section EAI/ePortal MM Page Template Section EAI                     |
| ePortal MM Template Access Group EAI                   |  | ePortal MM Template EAI/ePortal MM Template Access Group EAI                         |
| ePortal MM Template EAI                                |  | ePortal MM Page Template Section EAI/ePortal MM Template EAI                         |
| ePortal MM Page Item EAI                               | Page Item display information                    | ePortal MM Page Section EAI/ePortal MM Page Item EAI                                 |
| ePortal MM Template Item Access Group Intersection     |  | ePortal MM Template Page Item EAI/ePortal MM Template Item Access Group Intersection |
| ePortal MM Template Page Item EAI                      |  | ePortal MM Template EAI/ePortal MM Template Page Item EAI                            |
| ContentBase Content Set (Content Management)           | Set identity                                     | ePortal MM Page EAI/ContentBase Content Set (Content Management)                     |
| ContentBase Content Set (Content Management)_Pr. Asset | Home page identification                         |  |
| ContentBase Asset (Content Management)                 | Asset identity                                   | ContentBase Content Set (Content Management)/ContentBase Asset (Content Management)  |
| ContentBase Asset (Content Management)_Access Group    | ContentBase Access Group relationship            |  |
| ContentBase Asset (Content Management)_Current Version | ContentBase Asset current version identification |  |

Table 21. Prebuilt Content Object: Microsite Management Page

| Business Components                                      | Transferred Data                      | Links   |
|--|---------------------------------------|---|
| ContentBase Asset Access Group Intersection              |                                       | ContentBase Asset (Content Management)/ContentBase Asset Access Group Intersection                |
| ContentBase Version (Content Management)                 | Asset revision information            | ContentBase Asset (Content Management)/ContentBase Version (Content Management)                   |
| ContentBase Data (Content Management)                    | Content stored in database repository | ContentBase Version (Content Management)/ContentBase Data (Content Management)                    |
| ContentBase Namespace Aliases (Content Management)       | XML namespace information             | ContentBase Version (Content Management)/ContentBase Namespace Aliases (Content Management)       |
| ContentBase Version File Attachment (Content Management) | Content stored in file system         | ContentBase Version (Content Management)/ContentBase Version File Attachment (Content Management) |
| ContentBase Version for Version Children                 | Asset version interrelations          | ContentBase Content Set (Content Management)/ContentBase Version for Version Children             |
| ContentBase Ref (Content Management)                     | Links to other assets                 | ContentBase Version for Version Children/ContentBase Ref (Content Management)                     |

## Price List Content Object

Price List is a prebuilt content object based on the business object Price List. [Table 22](#) lists the business components for the prebuilt content object Price List.

Table 22. Prebuilt Content Object: Price List

| Business Components | Transferred Data   | Links   |
|---------------------|--|---------|
| Price List          | Price List<br>Association relationships to Organizations | Primary |

## Product Content Object

Product is a prebuilt content object based on the business object Product Admin Definition. [Table 23](#) lists the business components for the prebuilt content object Product.

Table 23. Prebuilt Content Object: Product

| Business Components                           | Transferred Data  | Links  |
|---|---|--|
| Internal Product                              | Internal Product  | Primary  |
| Admin Product Definition (Content Management) | Association relationships<br>Defined in the intersection table: Rank column; Value column | Internal Product/Admin Product Comparison - Admin (Content Management) |
| Component Product                             | Association relationships<br>Defined in the intersection table: Relation Type             | Internal Product/Component Product - Admin                             |
| FS Inventory Options                          | Association relationships   | Internal Product/FS Inventory Options                                  |
| FS Product Measurement Characteristics        | Association relationships   | Internal Product/FS Product Measurement Characteristics                |
| Internal Product Sales Tool                   | Association relationships   | Internal Product/Internal Product Sales Tool - Admin                   |
| Key Feature                                   | Association relationships   | Internal Product/Key Feature - Admin                                   |
| Price List                                    | Association relationships<br>Defined in the intersection table: some columns              | Internal Product/Price List - Admin                                    |

## Product Class Content Object

Product Class is a prebuilt content object based on the business object XA Authoring Object. [Table 24](#) lists the business components for the prebuilt content object Product Class.

Table 24. Prebuilt Content Object: Product Class

| Business Components  | Transferred Data                    | Links                         |
|----------------------|-------------------------------------|-------------------------------|
| XA Class             | Product Class                       | Primary                       |
| XA Class Translation | Product Class Language Translations | XA Class/XA Class Translation |



Table 24. Prebuilt Content Object: Product Class

| Business Components      | Transferred Data                                    | Links                                 |
|--------------------------|---|---------------------------------------|
| XA Attribute             | Product Class Child Attributes                      | XA Class/XA Attribute                 |
| XA Attribute Translation | Product Class Child Attribute Language Translations | XA Attribute/XA Attribute Translation |

## Product Feature Content Object

Product Feature is a prebuilt content object based on the business object Product Feature (Content Management). [Table 25](#) lists the business components for the prebuilt content object Product Feature.

Table 25. Prebuilt Content Object: Product Feature

| Business Components          | Transferred Data                        | Links   |
|------------------------------|---|---------|
| Product Feature              | Product Feature                         | Primary |
| Product Feature_Product Line | Association of Features to Product Line | N/A     |

## Product Line Content Object

Product Line is a prebuilt content object based on the business object Admin Product Line (Content Management). [Table 26](#) lists the business components for the prebuilt content object Product Line.

Table 26. Prebuilt Content Object: Product Line

| Business Components         | Transferred Data        | Links   |
|-----------------------------|-------------------------|---------|
| Admin Product Line          | Product Line            | Primary |
| Admin Product Line_Position | Association to Position | N/A     |

## Resolution Item Content Object

Resolution Item is a prebuilt content object based on the business object Resolution Item. [Table 27](#) lists the business components for the prebuilt content object Resolution Item.

Table 27. Prebuilt Content Object: Resolution Item

| Business Components | Transferred Data          | Links                       |
|---------------------|---------------------------|-----------------------------|
| SR Resolution Item  | Resolution Item           | Primary                     |
| Solution            | Association relationships | SR Resolution Item/Solution |

## Solution Content Object

Solution is a prebuilt content object based on the business object Solution. [Table 28](#) lists the business components for the prebuilt content object Solution.

Table 28. Prebuilt Content Object: Solution

| Business Components | Transferred Data          | Links                       |
|---------------------|---------------------------|-----------------------------|
| Solution            | Solution                  | Primary                     |
| Related Solution    | Association relationships | Solution/Related Solution   |
| SR Resolution Item  | Association relationships | Solution/SR Resolution Item |

## Volume Discount Content Object

Volume Discount is a prebuilt content object based on the business object Volume Discount. [Table 29](#) lists the business components for the prebuilt content object Volume Discount.

Table 29. Prebuilt Content Object: Volume Discount

| Business Components  | Transferred Data   | Links  |
|----------------------|--|--|
| Volume Discount      | Volume Discount  | Primary  |
| Volume Discount Item | Detailed relationships   | Volume Discount/Volume Discount Item - Admin<br>(This link has no restriction on insert/update.) |
| Price List           | Association relationships<br>Defined in the intersection table: some columns | Internal Product/Price List - Admin  |

## Content Project Business Service

The Content Project business service allows clients to perform various operations on Oracle's Siebel Content Projects. Business service scripts, workflow-driven services, and business components can call the Content Project business service methods to manipulate Content Projects. It can be used to start and publish a content project and to add, delete, and update a content project or a content item. It includes the following methods:

- ["AddContentItem Method" on page 123](#)
- ["AddProject Method" on page 124](#)
- ["Export Method" on page 124](#)
- ["Import Method" on page 124](#)
- ["PublishProject Method" on page 125](#)
- ["RemoveContentItem Method" on page 125](#)
- ["RemoveProject Method" on page 125](#)
- ["StartProject Method" on page 126](#)
- ["UpdateContentItem Method" on page 126](#)
- ["UpdateProject Method" on page 127](#)

### AddContentItem Method

This method adds a content item to the specified project. First it searches the project in the Content Project business component, and then it searches content type name, pick applet, picklist name, and source field name in the Content Type business component.

[Table 30](#) lists the arguments for the AddContentItem method.

Table 30. Arguments for the AddContentItem Method

| Argument        | Type   | Description                          | Required |
|-----------------|--------|--------------------------------------|----------|
| ProjectId       | Input  | The project ID to add a content item | X        |
| ItemName        | Input  | The item name to add                 | X        |
| ItemAction      | Input  | The action for item to perform       | X        |
| ItemDescription | Input  | The description for the item         |          |
| ItemTypeId      | Input  | Type ID for the item                 | X        |
| ItemReference   | Input  | The reference for the item           |          |
| ItemId          | Output | The item ID for the added item       |          |

## AddProject Method

This method creates a new content project.

Table 31 lists the arguments for the AddProject method.

Table 31. Arguments for the AddProject Method

| Argument                     | Type   | Description                                   | Required |
|------------------------------|--------|---|----------|
| ProjName                     | Input  | The project name to create                    | X        |
| ProjectDescription           | Input  | The description for the project               |          |
| ProjectOwnerId               | Input  | The owner ID for the project                  |          |
| ProjectPlanPublicationDate   | Input  | The planning publication date for the project |          |
| ProjectPublicationWorkflowId | Input  | The publication workflow ID for the project   |          |
| ProjectId                    | Output | The project ID for the created project        |          |

## Export Method

If Connect String is not empty, this method exports the project from the staging environment to the production environment. If Connect String is empty and Export Directory is not empty, the method exports the project to the export directory. The method fails if both Connect String and Export Directory are empty.

Table 32 lists the arguments for the Export method.

Table 32. Arguments for the Export Method

| Argument           | Type  | Description              | Required |
|--------------------|-------|--------------------------|----------|
| Content Project Id | Input | The project ID to export | X        |
| Connect String     | Input | Connect string to export |          |
| Export Directory   | Input | The directory to export  |          |

## Import Method

This method imports a project which has been exported using Export method.

Table 33 lists the arguments for the Import method.

Table 33. Arguments for the Import Method

| Argument           | Type  | Description                                 | Required |
|--------------------|-------|---|----------|
| Content Project Id | Input | The project ID to import into               | X        |
| Export Directory   | Input | The directory containing the export project |          |

## PublishProject Method

This method publishes the project by calling the methods RequestPublish and Publish of Content Project business component. If SynchronousIndicator="N", the method calls the RequestPublish method. Otherwise, it calls the Publish method.

Table 34 lists the arguments for the PublishProject method.

Table 34. Arguments for the PublishProject Method

| Argument             | Type  | Description                               | Required |
|----------------------|-------|---|----------|
| ProjectId            | Input | The project ID to publish                 | X        |
| SynchronousIndicator | Input | Indicator for sync (Y or N; default is Y) |          |

## RemoveContentItem Method

This method removes a content item. If ItemId is provided, ProjectId and ItemName are not necessary. Otherwise, ProjectId and ItemName are required.

Table 35 lists the arguments for the RemoveContentItem method.

Table 35. Arguments for the RemoveContentItem Method

| Argument  | Type  | Description   |
|-----------|-------|---|
| ProjectId | Input | The project ID from which the content item is removed |
| ItemName  | Input | The item name to remove                               |
| ItemId    | Input | The item ID to remove                                 |

## RemoveProject Method

This method removes a content project.

Table 36 lists the arguments for the RemoveProject method.

Table 36. Arguments for the RemoveProject Method

| Argument  | Type  | Description              | Required |
|-----------|-------|--------------------------|----------|
| ProjectId | Input | The project ID to remove | X        |

## StartProject Method

This method starts the project by calling the methods RequestStartProject and StartProject of the Content Project business component. If SynchronousIndicator = "N", the method calls the RequestStartProject method. Otherwise, the method calls the StartProject method.

Table 37 lists the arguments for the StartProject method.

Table 37. Arguments for the StartProject Method

| Argument             | Type  | Description                               | Required |
|----------------------|-------|---|----------|
| ProjectId            | Input | The project ID to start                   | X        |
| SynchronousIndicator | Input | Indicator for sync (Y or N; default is Y) |          |

## UpdateContentItem Method

This method updates a content item. If ItemId is provided, ProjectId and ItemName are not necessary and the item name can be updated. Otherwise, ProjectId and ItemName are required. If ItemTypeId is provided, the method searches content type name, pick applet, picklist name, and source field name in Content Type business component.

Table 38 lists the arguments for the UpdateContentItem method.

Table 38. Arguments for the UpdateContentItem Method

| Argument        | Type  | Description                                  |
|-----------------|-------|--|
| ProjectId       | Input | The project ID where update the content item |
| ItemName        | Input | The item name to update                      |
| ItemId          | Input | The item ID to update                        |
| ItemAction      | Input | The action for item to update                |
| ItemDescription | Input | The description to update                    |
| ItemTypeId      | Input | Type ID to update                            |

Table 38. Arguments for the UpdateContentItem Method

| Argument      | Type  | Description               |
|---------------|-------|---------------------------|
| ItemReference | Input | The reference to update   |
| ItemStatus    | Input | The item status to update |

## UpdateProject Method

This method updates a content project.

Table 39 lists the arguments for the UpdateProject method.

Table 39. Arguments for the UpdateProject Method

| Argument                     | Type  | Description                             | Required |
|------------------------------|-------|---|----------|
| ProjectId                    | Input | The project ID for updating             | X        |
| ProjName                     | Input | The project name to update              |          |
| ProjectDescription           | Input | The description to update               |          |
| ProjectOwnerId               | Input | The owner ID to update                  |          |
| ProjectPlanPublicationDate   | Input | The planning publication date to update |          |
| ProjectPublicationWorkflowId | Input | The publication workflow ID to update   |          |





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