Oracle® Content Manager

User Guide

Release 11*i*

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Oracle Content Manager User Guide, Release 11*i*

Part No. B10595-01

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Oracle Content Manager User Guide, Release 11*i*

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U.S.A.

If you would like a reply, please give your name, address, telephone number, and (optionally) electronic mail address.

If you have problems with the software, please contact your local Oracle Support Services.

Preface

Intended Audience

Welcome to Release 11*i* of the Oracle Content Manager User Guide.

This guide assumes you have a working knowledge of the following:

- The principles and customary practices of your business area.
- Oracle Content Manager

  If you have never used Oracle Content Manager, Oracle suggests you attend one or more of the Oracle Content Manager training classes available through Oracle University.

- The Oracle Applications graphical user interface.

  To learn more about the Oracle Applications graphical user interface, read the *Oracle Applications User's Guide*.

See Other Information Sources for more information about Oracle Applications product information.

How To Use This Guide

This document contains the information you need to understand and use Oracle Content Manager (OCM).

- Chapter 1 provides a brief introduction to OCM and its key features.
- Chapter 2 gives a summary of OCM tasks, and some important terms and definitions.

- Chapter 3 gives user procedures that help you to perform tasks in the Content Type tab.
- Chapter 4 gives user procedures that help you to perform tasks in the Foldering tab, and information on data security.
- Chapter 5 gives user procedures that help you to perform tasks in the My Content tab.
- Chapter 6 gives user procedures that help you to perform tasks in the Library tab.
- Chapter 7 gives user procedures that help you to perform tasks in the Pending Approvals tab.
- Chapter 8 gives user procedures that help you to perform tasks in the Translations tab.
- Chapter 9 gives user procedures that help you to perform tasks in the Trash tab.

Documentation Accessibility

Our goal is to make Oracle products, services, and supporting documentation accessible, with good usability, to the disabled community. To that end, our documentation includes features that make information available to users of assistive technology. This documentation is available in HTML format, and contains markup to facilitate access by the disabled community. Standards will continue to evolve over time, and Oracle Corporation is actively engaged with other market-leading technology vendors to address technical obstacles so that our documentation can be accessible to all of our customers. For additional information, visit the Oracle Accessibility Program Web site at `http://www.oracle.com/accessibility/`.

Accessibility of Code Examples in Documentation JAWS, a Windows screen reader, may not always correctly read the code examples in this document. The conventions for writing code require that closing braces should appear on an otherwise empty line; however, JAWS may not always read a line of text that consists solely of a bracket or brace.

Other Information Sources

You can choose from many sources of information, including online documentation, training, and support services, to increase your knowledge and understanding of Oracle Content Manager.

If this guide refers you to other Oracle Applications documentation, use only the Release 11*i* versions of those guides.

Online Documentation

All Oracle Applications documentation is available online (HTML or PDF). Online help patches are available on MetaLink.

Related Documentation

Oracle Content Manager shares business and setup information with other Oracle Applications products. Therefore, you may want to refer to other product documentation when you set up and use Oracle Content Manager.

You can read the documents online by choosing Library from the expandable menu on your HTML help window, by reading from the Oracle Applications Document Library CD included in your media pack, or by using a Web browser with a URL that your system administrator provides.

If you require printed guides, you can purchase them from the Oracle Store at `http://oraclestore.oracle.com`.

Documents Related to All Products

Oracle Applications User's Guide

This guide explains how to enter data, query, run reports, and navigate using the graphical user interface (GUI) available with this release of Oracle Content Manager (and any other Oracle Applications products). This guide also includes information on setting user profiles, as well as running and reviewing reports, and concurrent processes.

You can access this user's guide online by choosing "Getting Started with Oracle Applications" from any Oracle Applications help file.

Documents Related to This Product

Oracle Applications Concepts

This guide provides an introduction to the concepts, features, technology stack, architecture, and terminology for Oracle Applications Release 11*i*. It provides a useful first book to read before an installation of Oracle Applications. This guide also introduces the concepts behind Applications-wide features such as Business Intelligence (BIS), languages and character sets, and Self-Service Web Applications.

Oracle Workflow Administrator's Guide

This guide explains how to complete the setup steps necessary for any Oracle Applications product that includes workflow-enabled processes, as well as how to monitor the progress of runtime workflow processes. Oracle Workflow must be set up in OCM to submit content items for approval and translation.

Oracle Applications System Administrator's Guide

This guide provides planning and reference information for the Oracle Applications System Administrator. It contains information on how to define security, customize menus and online help, manage concurrent processing, and setting up your environment to work with multiple languages.

Installation and System Administration

Installing Oracle Applications

This guide provides instructions for managing the installation of Oracle Applications products. In Release 11*i*, much of the installation process is handled using Oracle Rapid Install, which minimizes the time to install Oracle Applications, the Oracle8 technology stack, and the Oracle8*i* Server technology stack by automating many of the required steps. This guide contains instructions for using Oracle Rapid Install and lists the tasks you need to perform to finish your installation. You should use this guide in conjunction with individual product user's guides and implementation guides.

Oracle Applications Supplemental CRM Installation Steps

This guide contains specific steps needed to complete installation of a few of the CRM products. The steps should be done immediately following the tasks given in the Installing Oracle Applications guide.

Upgrading Oracle Applications

Refer to this guide if you are upgrading your Oracle Applications Release 10.7 or Release 11.0 products to Release 11*i*. This guide describes the upgrade process and lists database and product-specific upgrade tasks. You must be either at Release 10.7 (NCA, SmartClient, or character mode) or Release 11.0, to upgrade to Release 11*i*. You cannot upgrade to Release 11*i* directly from releases prior to 10.7.

Maintaining Oracle Applications

Use this guide to help you run the various AD utilities, such as AutoUpgrade, AutoPatch, AD Administration, AD Controller, AD Relink, License Manager, and others. It contains how-to steps, screenshots, and other information that you need to run the AD utilities. This guide also provides information on maintaining the Oracle applications file system and database.

Oracle Alert User's Guide

This guide explains how to define periodic and event alerts to monitor the status of your Oracle Applications data.

Oracle Applications Developer's Guide

This guide contains the coding standards followed by the Oracle Applications development staff. It describes the Oracle Application Object Library components needed to implement the Oracle Applications user interface described in the *Oracle Applications User Interface Standards for Forms-Based Products*. It also provides information to help you build your custom Oracle Forms Developer 6*i* forms so that they integrate with Oracle Applications.

Oracle Applications User Interface Standards for Forms-Based Products

This guide contains the user interface (UI) standards followed by the Oracle Applications development staff. It describes the UI for the Oracle Applications products and how to apply this UI to the design of an application built by using Oracle Forms.

Other Implementation Documentation

Multiple Reporting Currencies in Oracle Applications

If you use the Multiple Reporting Currencies feature to record transactions in more than one currency, use this manual before implementing Oracle Content Manager. This manual details additional steps and setup considerations for implementing Oracle Content Manager with this feature.

Multiple Organizations in Oracle Applications

This guide describes how to set up and use Oracle Content Manager with Oracle Applications' Multiple Organization support feature, so you can define and support different organization structures when running a single installation of Oracle Content Manager.

Oracle Workflow Developer's Guide

This guide explains how to define new workflow business processes and customize existing Oracle Applications-embedded workflow processes. It also describes how to define and customize business events and event subscriptions.

Oracle Workflow User's Guide

This guide describes how Oracle Applications users can view and respond to workflow notifications and monitor the progress of their workflow processes.

Oracle Workflow API Reference

This guide describes the APIs provided for developers and administrators to access Oracle Workflow.

Oracle Applications Flexfields Guide

This guide provides flexfields planning, setup and reference information for the Oracle Content Manager implementation team, as well as for users responsible for the ongoing maintenance of Oracle Applications product data. This manual also provides information on creating custom reports on flexfields data.

Oracle eTechnical Reference Manuals

Each eTechnical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for a specific Oracle Applications product. This information helps you convert data from your existing applications, integrate Oracle Applications data with non-Oracle applications, and write custom reports for Oracle Applications products. Oracle eTRM is available on Metalink

Oracle Manufacturing APIs and Open Interfaces Manual

This manual contains up-to-date information about integrating with other Oracle Manufacturing applications and with your other systems. This documentation includes APIs and open interfaces found in Oracle Manufacturing.

Oracle Order Management Suite APIs and Open Interfaces Manual

This manual contains up-to-date information about integrating with other Oracle Manufacturing applications and with your other systems. This documentation includes APIs and open interfaces found in Oracle Order Management Suite.

Oracle Applications Message Reference Manual

This manual describes Oracle Applications messages. This manual is available in HTML format on the documentation CD-ROM for Release 11*i*.

Oracle CRM Application Foundation Implementation Guide

Many CRM products use components from CRM Application Foundation. Use this guide to correctly implement CRM Application Foundation.

Training and Support

Training

Oracle offers training courses to help you and your staff master Oracle Content Manager and reach full productivity quickly. You have a choice of educational environments. You can attend courses offered by Oracle University at any one of our many Education Centers, you can arrange for our trainers to teach at your facility, or you can use Oracle Learning Network (OLN), Oracle University's online education utility. In addition, Oracle training professionals can tailor standard courses or develop custom courses to meet your needs. For example, you may want to use your organization's structure, terminology, and data as examples in a customized training session delivered at your own facility.

Support

From on-site support to central support, our team of experienced professionals provides the help and information you need to keep Oracle Content Manager working for you. This team includes your Technical Representative, Account Manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle8*i* server, and your hardware and software environment.

Oracle*MetaLink*

Oracle*MetaLink* is your self-service support connection with web, telephone menu, and e-mail alternatives. Oracle supplies these technologies for your convenience, available 24 hours a day, 7 days a week. With Oracle*MetaLink*, you can obtain information and advice from technical libraries and forums, download patches, download the latest documentation, look at bug details, and create or update TARs. To use MetaLink, register at `http://metalink.oracle.com`.

Alerts: You should check Oracle*MetaLink* alerts before you begin to install or upgrade any of your Oracle Applications. Navigate to the Alerts page as follows:

Technical Libraries/ERP Applications/Applications Installation and Upgrade/Alerts.

Self-Service Toolkit: You may also find information by navigating to the Self-Service Toolkit page as follows: Technical Libraries/ERP Applications/Applications Installation and Upgrade.

Do Not Use Database Tools to Modify Oracle Applications Data

Oracle STRONGLY RECOMMENDS that you never use SQL*Plus®, Oracle Data Browser, database triggers, or any other tool to modify Oracle Applications data unless otherwise instructed.

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as SQL*Plus to modify Oracle Applications data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle Applications tables are interrelated, any change you make using Oracle Applications can update many tables at once. But when you modify Oracle Applications data using anything other than Oracle Applications, you may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle Applications.

When you use Oracle Applications to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications also keeps track of who changes information. If you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL*Plus and other database tools do not keep a record of changes.

About Oracle

Oracle Corporation develops and markets an integrated line of software products for database management, applications development, decision support, and office automation, as well as Oracle Applications, an integrated suite of more than 160 software modules for financial management, supply chain management, manufacturing, project systems, human resources, and customer relationship management.

Oracle products are available for mainframes, minicomputers, personal computers, network computers and personal digital assistants, allowing organizations to integrate different computers, different operating systems, different networks, and even different database management systems, into a single, unified computing and information resource.

Oracle is the world’s leading supplier of software for information management, and the world’s second largest software company. Oracle offers its database, tools, and applications products, along with related consulting, education, and support services, in over 145 countries around the world.

Part I

Introduction and Overview

This part contains the following chapters:

1

Introduction to Oracle Content Manager

This chapter discusses the key features and process flows of Oracle Content Manager. Sections in this chapter include:

- Section 1.1, "Overview"
- Section 1.2, "Oracle Content Manager Key Features"
- Section 1.3, "Oracle Content Manager Integrations"
- Section 1.4, "Oracle Content Manager Key Relationships"

1.1 Overview

The rise of the Internet has definitely changed everything; it gave companies a new way of selling products and getting information to consumers. Anyone and everyone who had access to a text editor and a Web server could deploy information to the world faster than ever before in history. This ease and speed gave rise to a new problem: Could this content be trusted? For the end consumer this problem is frustrating. For companies trying to protect their brand, and consumer loyalty, it can be crippling.

Oracle Content Manager (OCM) improves corporate information accuracy by putting the control into the hands of the experts. This model is not new; before the Internet, public relations, marketing firms, and product managers were responsible for developing and releasing company information. This model was abandoned for multiple reasons:

- The content experts were not HTML experts, thus could not develop "attractive web sites".
- Waiting for content experts to create and approve new content that then had to be reformatted into HTML, added to a lifecycle which needed to be short.

- Every creator had their own definition of content and did not always ensure consistency and accuracy. Therefore, there was no single source of truth.
- There was no collaboration or reuse of content, and business processes were not in synchronization with the corporate viewpoint.

Content management encompasses all business practices and technical processes that are performed for the purpose of capturing, maintaining, sharing, and preserving recorded meaning. Electronic content is not limited to the web or to print. Increasingly, content must be created for multiple channels, including customers, business partners, and employees.

OCM addresses these issues by enabling content experts to develop content without worrying about how it is going to be published, and giving publishers the tools they need to get the latest, most accurate information out to the public.

1.1.1 Business Needs

The features and functionality provided in OCM help in addressing the following business needs.

Improve Enterprise Collaboration

In today's world, as the boundaries of work have shrunk, people often have to communicate their ideas and collaborate with each other to accomplish their tasks. It has become increasingly important for enterprises to use tools that boost collaboration and facilitate better use of time and money.

Improve Consistency and Accuracy

The rise of the Internet has definitely changed everything; it gave companies a new way of selling products and getting information to consumers. Anyone and everyone who had access to a text editor and a web server could deploy information to the world faster than ever before in history. This ease and speed gave rise to a new problem: Could this content be trusted? For the end consumer, this problem is frustrating. For companies trying to protect their brand, and consumer loyalty, it can be crippling. Companies are increasingly looking forward to solutions that ensure consistency and accuracy of content and provide a single source of truth.

Maximize Value of Collateral

The last five years have seen some of the most dramatic in business with the rise of the Internet and the dotcom implosion. Most companies think of their enterprise content to be intellectual capital and hence content management solutions must preserve and maximize the value of this collateral. Companies look forward to the best use of this capital to streamline costs and increase operational efficiencies.

Provide Standards for Non-Structured Content

Most corporations have standards that are enforced using templates. In the absence of a robust content management solution, it becomes difficult to enforce these standards. Sooner or later, users start improvising on templates to suit short term needs. Therefore, it becomes necessary for the content management solution to enforce such standards via template-based creation.

Leverage Legacy Content

Corporations and content have existed since the beginning of the modern era. With the rise of the information age, the amount of content in electronic format has exponentially increased. Enterprises, while evaluating any content management solution look to address the need for leveraging and migrating existing legacy content.

1.1.2 Traditional Lifecycle of Content

Figure 1–1 High-level Lifecycle of a Content Item

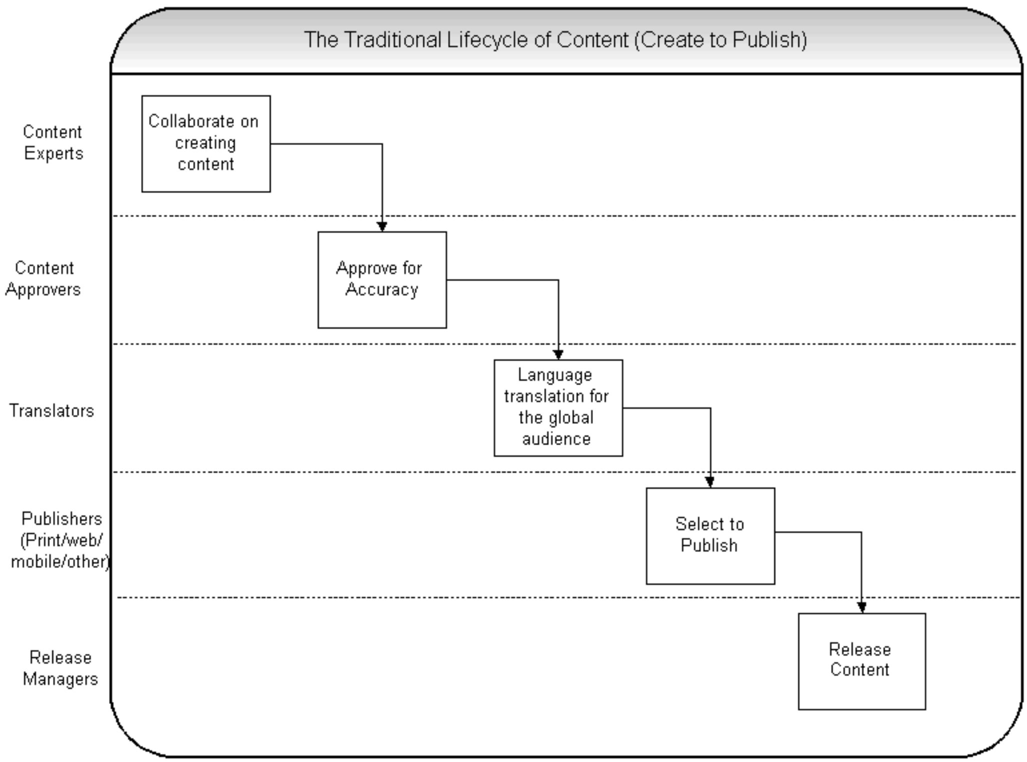


Figure 1–1 describes the lifecycle of a content item at a high level. Each step in the process may be an involved, collaborative effort, but the cycle has four major phases:

- **Creation**: At this step, everyone involved in creating or editing the piece of information does so in a collaborative manner. When they are finished, the item is submitted for approval.
- **Approval**: Depending on the type of content, there may be 0 (zero) to n approvals required. Once the item is approved, it is assumed to be correct and accurate.

- **Translation**: Depending on the type of content, it may need to be translated into multiple languages.
- **Publish**: In this step, publishers determine where an item will be published and what the display style should be.
- **Release**: A release manager has the responsibility of making sure that all content is released in a sensible way. For example, the content for a Christmas catalog may be completed in September, but it should not be released until late November.

While this life cycle makes sense in theory, it is inefficient in an organization where speed is just as important as accuracy. OCM provides tools to everyone in the content lifecycle to shorten it, while ensuring consistency and accuracy.

1.2 Oracle Content Manager Key Features

Key features in OCM include:

- Content Creation and Management
- Versioning
- Workflow-based Approval Management
- Language Translation
- Access Control
- Renditions (same content being stored and used in different formats)
- Content Type Creation and Management
- Separation of content storage from its presentation using stylesheets

1.3 Oracle Content Manager Integrations

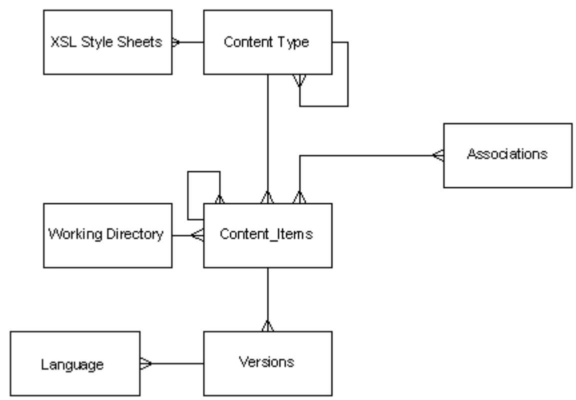
The following Oracle applications integrate with Oracle Content Manager:

- Oracle iStore
- Oracle Partners
- Oracle One-to-One Fulfillment
- Oracle Marketing
- Advanced Services Online

1.4 Oracle Content Manager Key Relationships

Figure 1–2 depicts the relationships of the different objects in the Oracle Content Manager system.

Figure 1–2 OCM Key Relationships



A description of the OCM key relationships is given below:

- Every content item has one and only one content type. However, within each content type defined, there may be nested content types. When a content type has nested content types, it is called a compound content type. A content item based on a compound content type is called a compound content item.
- An association is a link to other E-Business Suite objects like Marketing Campaigns, Schedules, or Inventory Items. A content item may have many associations.
- Each content item can have many versions and each version can have many languages associated with it.
- There can be multiple stylesheets but there is only one default stylesheet associated with the content type. Also, stylesheets are content items of type Stylesheet.

2

Overview of Using Oracle Content Manager

This chapter provides an overview of the user interface and the important tasks you can perform using Oracle Content Manager (OCM). Sections in this chapter include:

- Section 2.1, "Accessing Oracle Content Manager"
- Section 2.2, "Summary of Oracle Content Manager Tasks"
- Section 2.3, "Terms and Definitions"

2.1 Accessing Oracle Content Manager

To access OCM, make sure that you are set up as a FND USER with the appropriate responsibilities and data permissions, as per your work requirements. See the *Oracle Content Manager Implementation Guide* to set up users, and folder permissions.

2.2 Summary of Oracle Content Manager Tasks

Use OCM to perform the following types of tasks:

- Create and update content types. For information on working with content types, see Chapter 3, "Managing Content Types".
- Administer folder security. For information on folder security, see Chapter 4, "Managing Folder Permissions and Data Security"
- Create and update content items. For information on working with content items, see Chapter 5, "Managing Content Items".
- View content items from the OCM Library. For information on using the library, see Chapter 6, "Using the Content Item Library".

- Approve content items. For information on approving content items, see Chapter 7, "Managing Pending Approvals".
- Translate content items. For information on translating content items, see Chapter 8, "Managing Translations".
- Restore deleted content items, or remove them permanently. For more information, see Chapter 9, "Managing Trash".

2.3 Terms and Definitions

In the current version of OCM, you have a single repository to store content for Oracle's E-Business Suite. The individual CRM applications that use OCM have the flexibility to define what content they want to store in the repository. Any content that has a requirement to version, approve, and translate can be stored in OCM.

OCM provides mechanisms to:

- store and retrieve content that has gone through an approval process, been versioned and translated.
- render through API-level support. This enables content to be stored and published in different formats.

Content Types

Content types are the main tenet of OCM. Content types define the structure of the content item through a set of attributes which constitutes the meta data. Using content types ensures content consistency. Content types are not to be confused with a file, URL, or a presentation. Instead, they are types like images, white papers, or sales presentations.

Content Items

A content item is an instance of a content type. A content item may be of only one content type. However, it is possible to create a compound content type where several content types are bundled together. For instance, a content type of Sales Kit may require a presentation and a white paper, which by themselves are individual content types.

A compound content item is based on a compound content type. You can add content sub-items to make a compound content item. However, the sub-items can only be of the type defined in the compound content type.

Working Directory

A Working Directory (WD) is structured like a file directory system. Content items are managed (created, updated, approved, and archived) within the WDs. A WD has access privileges that may be granted to either individuals or groups. You can limit the access to a certain group of people. For instance, you may want to grant specific access to a team collating a proposal for a specific customer. Users can only see the WDs that they have access to.

Versioning

You can update an item by modifying an existing version or creating a new one. Each version may have the status of In Progress, Submitted, or Approved. OCM allows multiple approved versions to co-exist, but only one version can be set as the live version.

Workflow

OCM uses Oracle Workflow to notify users. Notifications are sent to alert users of content items that require approval, items that have been approved, or items that require translation.

Translation

Every content item is created in a base language, and later translated. OCM can store multiple translations of a content item. Each translation is associated with its base language item. New versions for the content item can be created only in the base language. To be able to translate, multiple languages must be installed.

Stylesheets

Stylesheets are associated with content types and tell the rendering engines how to display the content item to the calling application. Each content type may have many stylesheets associated with it. However, only one stylesheet can be set as the default. In OCM, a stylesheet is a content type, and individual stylesheets are stored in the repository like any other content item. OCM only supports stylesheets that are of type XSL.

Attribute

Attributes are individual components of a content type. An attribute is of data type varchar, date, number, or HTML. For example, for the Feature Article content type, Title is an attribute of the varchar data type.

Part II

User Procedures

This part contains the following chapters:

3 Managing Content Types

This chapter discusses tasks that you can perform from the Content Type tab. Sections in this chapter include:

3.1 Overview

The Content Type tab is the main workarea for content administrators. Content administrators create content types, and content items are created based on the content types.

Content types are the main tenet of Oracle Content Manager (OCM). Content types define the structure of the content item through a set of attributes which constitutes the meta data. Using content types ensures content consistency. Content types are not to be confused with a file, URL, or a presentation. Instead, they are types like images, white papers, or sales presentations. Examples of content types are simple content types such as Image and Stylesheets; compound content types such as Product Information which can contain its own set of attributes and sub-types such as Image or any of the other user-defined types.

A company may want to standardize its product information content to comprise many items. In OCM, this can achieved by creating a compound content type which will comprise the following:

- **Simple Attributes** - Product Name, Description, Feature Highlights, Overview, Product Information Guide (Attachment), and Product Release Date.
- **Sub-items** - Product Image, Product Thumbnail Image, Product Demo, Technical Specifications.

In the above scenario, the sub-items are individual content items based on their corresponding content types.

Table 3–1 describes the components of the Content Type tab, and the tasks that you can perform as a content type creator.

Table 3–1 Content Type Tab Fields

Name	Description	Reference
View	You can filter on the content type status to view Active, Inactive, or Seeded records.	For more information, see Viewing Content Types of a Particular Status.
Create Content Type	Click **Create Content Type** to create a content type.	For more information, see Creating a Content Type.
Inactivate/Activate	Click the icon next to Active to inactivate a content type. When inactivated, the content type cannot be used to create a content item. OR Click the icon next to Inactive to activate a content item.	For more information, see Inactivating a Content Type.
Update	Click **Update** to update a selected content type.	For more information, see Updating a Content Type.
Duplicate	Click **Duplicate** to make a copy of the selected content type. A new content type is created.	For more information, see Duplicating a Content Type.
Hyperlinked Content Type	Click the hyperlink to view the content type's details.	For more information, see Viewing Content Type Details.

3.2 Creating a Content Type

Before creating a content type, you may want to understand the content needs of your organization and accordingly decide on the definition of these content types. Also, content types cannot be modified once content items have been created using them.

Creating a content type is a three step process:

- Providing Basic Details
- Defining Content Type Attributes
- Defining a Compound Content Type

3.2.1 Providing Basic Details

The first step in creating a content type is to provide the basic details of the content type like its name, owner, and default stylesheet. Use the following procedure to provide the basic details.

Prerequisites

None

Responsibility

OCM Super User

Navigation

Content Type

Steps

1. Click **Create Content Type**.

   The Create Content Type page appears.

2. Enter a name in the Content Type Name field.
3. Enter the description of the content type in the Content Item Description field.
4. In the Content Type Owner field, click the Search icon to select a different owner.
5. Use the Status drop-down list to select the status for the content type.
6. Enter an XML tag for the content type in the Content Type XML tag field.

The XML tag should not contain any spaces, and must be unique. OCM stores this data in XML and uses it for content item presentation logic.

7. To select the default display sheet, click the Search icon.

   Stylesheets allow the previewing of content items based on the stylesheet definition.

8. Click **Next**.

   The Create Content Type: <*content type name*>: Attributes page appears.

3.2.2 Defining Content Type Attributes

The next step in creating a content type is to define its attributes. Use the following procedure to provide the attributes for the content type.

Attributes are individual components of a content type. An attribute is of data type varchar, date, or number.

An Example

Assume that you are creating a content type called Image Type. The attributes for Image Type could be Name (varchar), Description (varchar), Height (number), Width (number), Alternate Text (varchar), URL (URL), and an Image (attachment). When a content item of type Image is created, information for the above attributes must be provided.

Three types of attributes can be specified - Extended, Pulldown List, and Attachment attributes.

Prerequisites

Provide basic details for the content type. For more information, see Providing Basic Details.

Responsibility

OCM Super User

Navigation

Content Type > Create Content Type

Steps

1. In the Create Content Type: <*content type name*>: Attributes page, the content type name and description attributes are displayed with their order of display. This cannot be modified.
2. Create Content Type Extended Attributes.

   Extended attributes are of data type Boolean, Date, Number, HTML, Text and URL.

   While creating a content item of this type-

   - Attribute HTML will be displayed as a WYSIWYG HTML editor.
   - Attribute Boolean will be displayed as a check box.
   - Attribute Date will appear as a date picker.
3. Specify Pulldown Attributes for your content type.

   Note: In release 11.5.9, the Pulldown List attributes do *not* appear when you create your content item.
4. Create file attachment attributes for the content type.

   This attribute enables the user to upload attachments for the content item.
5. Click **Next** to specify details for a compound content type.
6. Optionally, if the content type being created is not compound, click **Submit**.

Reference

See Table 3–2, "Create Content Type Fields" for field details.

3.2.3 Defining a Compound Content Type

Apart from extended, pulldown list and attachment attributes, compound content type is another attribute. A content type can have other content types as its components. Such a content type is a compound content type. For example, a Product Brochure content type can have other content types such as Product Presentation, Product Whitepaper, and Product Demo as its components. This makes Product Brochure a compound content type.

Use the following procedure to define a compound content type.

Prerequisites

Provide basic details for the content type. For more information, see Providing Basic Details.

Responsibility

OCM Super User

Navigation

Content Type > Create Content Type

Steps

1. In the Create Content Type: <*content type name*>: Attributes page, specify other content type(s) that must be a part of this content type.
2. Click **Submit**.

   The content type details are saved.

Reference

See Table 3–2, "Create Content Type Fields" for field details.

Table 3–2 Create Content Type Fields

Name	Description	Applicable to
Attribute Name	Name of the attribute. Displayed as a field while creating a content item.	Extended, Pulldown List, Attachment, and Compound Content Type attributes
Description	Description of the attribute.	Extended, Pulldown List, Attachment, and Compound Content Type attributes
XML Tag	Unique identifier for each attribute and should not contain any spaces. OCM stores this data as XML. This information can be used by external applications to fetch specific data.	Extended, Pulldown List, Attachment, and Compound Content Type attributes

Table 3–2 Create Content Type Fields

Name	Description	Applicable to
Required	Indicates whether this field is mandatory while creating a content item. Use the drop-down list to select your option.	Extended, Pulldown List, and Attachment attributes
Data Format	Format for this attribute. Use the drop-down list to select a data format.	Extended and Pulldown List attributes
Field Length	Maximum number of characters that can be entered as a value for this attribute.	Extended attribute
Default Value	Default value for this attribute. This value is displayed by default while creating the content item.	Extended and Pulldown List attributes
Default Value Updateable?	Can the default value be updated by the user while creating the content item? Use the drop-down list to select your option.	Extended attribute
Display Order	Attribute's place in the order of display while creating the content item. By default, the numbering follows a serial order.	Extended, Pulldown List, Attachment, and Compound Content Type attributes
LOV Name	List of values (LOV) to be displayed for the pulldown list attribute. Click the Search icon to select a LOV.	Pulldown List attribute
Content Type	Content type that will be a sub-component of this content type. Based on this, content items of this type will be sub-items when the compound content item is created. Click the Search icon to select a content type.	Compound Content Type

Table 3–2 Create Content Type Fields

Name	Description	Applicable to
Minimum	Minimum number of content items of the content type that must be included as part of the compound content item. If set to `0` (zero) or left blank, the sub-item of this type is not mandatory. If set to any number greater than `0` (zero), while creating the compound content item, it is mandatory to add that many number of content items of this type as sub-items.	Compound Content Type
Maximum	Maximum number of content items of the content type that can be included as part of the compound content item. If left blank, while creating the compound content item, any number of content items of this type can be added as sub-items.	Compound Content Type
Default Content Item	Default content item for this content type. Click the Search icon to select a content item.	Compound Content Type
Default Item Updateable?	Can the default content item be updated by the user while creating the content item? Use the drop-down list to select your option.	Compound Content Type

3.3 Updating a Content Type

A content type can be updated if content items of the same type are not created. Seeded content types cannot be updated. To modify a seeded content type, make a copy, and update it. For more information on making a copy, see Duplicating a Content Type.

Use the following procedure to update a content type.

Prerequisites

None

Responsibility

OCM Super User

Navigation

Content Type

Steps

1. Select the content type to update.

   Seeded content types cannot be selected.

2. Click **Update**.

   The Update Content Type page appears with the content type's basic details displayed.

3. Make changes as required.

4. To modify content type attributes, click **Next.**

   The Update Content Type: <*content type name*>: Attributes page appears.

   See Section 3.2.2, "Defining Content Type Attributes" for updating attributes.

5. To modify the compound content type attributes, click **Next.**

   See Section 3.2.3, "Defining a Compound Content Type" for updating a compound content type.

6. Click **Submit**.

   The content type is saved with the changes.

Reference

See Table 3–2, "Create Content Type Fields" for field details.

3.4 Inactivating a Content Type

When a content type is inactivated, new content items of this type cannot be created from the My Content tab. Existing content items of this type will remain unchanged. Use the following procedure to change the status of a content type.

Note: An inactivated content type is not displayed in the Content Type drop-down list in the My Content tab.

Prerequisites
None

Responsibility
OCM Super User

Navigation
Content Type

Steps
1. Select the content type to inactivate. Seeded content types cannot be selected.
2. In the Status column, click the icon next to Active.

   The icon changes, and the status is now Inactive.

Note: To activate a content type, click the icon next to Inactive in the Status column.

3.5 Viewing Content Types of a Particular Status
Use the following procedure to view content items of a selected status.

Prerequisites
None

Responsibility
OCM Super User

Navigation
Content Type

Steps

1. From the Content Type tab's Search region, select the status from the Views drop-down list.
2. Optionally, enter the name of the content type in the Content type Name field.

   You can use the `%` wildcard, if required.
3. Optionally, to view content types created by you, select the Show my Content Types only check box.
4. Click **Go**.

   All the content items with the selected status are displayed.

3.6 Duplicating a Content Type

You can make a copy of a content type and update it. This feature is particularly useful when you need to -

- make changes to a content type but cannot because there are content items already defined for it.
- make changes to a seeded content type .

Use the following procedure to duplicate a content type.

Prerequisites

None

Responsibility

OCM Super User

Navigation

Content Type

Steps

1. Select the content type to duplicate.
2. Click the Duplicate icon from the Duplicate column.

   The Create Content Type page is displayed. For more information on creating a content type, see Creating a Content Type.

3.7 Viewing Content Type Details

The content type's details such as its default stylesheet and all attributes defined are displayed. Use the following procedure to view the details of a content type.

Prerequisites

None

Responsibility

OCM Super User

Navigation

Content Type

Steps

1. From the Content Type Name column, click the hyperlinked content type name.

   The Content Type Details :<*content type name*> page appears displaying the details of the content type.

2. To print preview the page, click **Printable Page**.

   To return to the Content Type summary page, click the Return to Content Type hyperlink.

3.8 Mapping Stylesheets to a Content Type

Stylesheets define how content in a content item should be rendered on a Web site or on any other device. It also enables users to preview a content item before it is released. Therefore, it is essential that a stylesheet is attached to a content type.

Stylesheets must conform to the XSL format. Stylesheet is a seeded content type. Create a content item of type Stylesheet to create your own stylesheet.

Multiple stylesheets may be mapped with a content type. However, only one stylesheet can be set as the default. When a content item of a particular type must be viewed using another stylesheet, the default stylesheet must be changed.

Use the following procedure to map stylesheets to a content type.

Prerequisites

You must have content items of type Stylesheet in the repository.

Responsibility

OCM Super User

Navigation

Content Type > Stylesheet Mapping

Steps

1. From the Stylesheets Mapping region, select the content type from the Select Content Type drop-down list.
2. Click **Go**.

   Mapped stylesheet(s) (if any), of the content type, are listed in the Mapped Stylesheets region. The default stylesheet is selected in the Select column.
3. To map a stylesheet, click **Add New Row**.

   A blank row is added.
4. Click the Search icon to search for a stylesheet.

   The Search and Select: Stylesheet pop-up window appears.
5. Enter the stylesheet's name partly or fully in the Search By field.

   You can use the `%` wildcard, if required.
6. Click **Go**.

   The search results appear in the Results region. All approved content items of content type Stylesheet are listed.
7. Select the stylesheet to map to the content type.
8. Click **Select**.

   The name of the selected stylesheet is displayed in the new row.
9. Optionally, to make this stylesheet the default for the content type, select the stylesheet from the Select column.
10. Click **Submit**.

    A confirmation message is displayed. The Default Stylesheet column indicates whether the stylesheet is the default.
11. Optionally, to map another stylesheet, follow steps 3 to 8.

12. Optionally, to delete a stylesheet mapping, click the Delete icon from the Delete column.

    The stylesheet is removed. However, the mapping is not deleted unless you submit your action.

13. Click **Submit**.

    A confirmation message is displayed, and the mapping is removed.

4

Managing Folder Permissions and Data Security

This chapter discusses tasks that you can perform from the Foldering tab. Sections in this chapter include:

- Section 4.1, "Overview"
- Section 4.2, "Viewing Permissions for a User or Group"
- Section 4.3, "Setting User/Group Permissions"
- Section 4.4, "Setting Default Global Permissions"
- Section 4.5, "Data Security Behavior"

4.1 Overview

The Foldering tab is used by the Oracle Content Manager (OCM) administrators to manage security for the content in various folders. OCM users can create or view content based on the security settings and the folder permissions that are set up from this tab.

Table 4–1 describes the components of the Foldering tab, and the tasks that you can perform as an OCM administrator.

Table 4–1 Foldering Tab fields

Name	Description	Reference
Select	You can search for a User or Group to grant or deny access. Use the Select drop-down list to select your option, and click the Search icon.	For more information, see Viewing Permissions for a User or Group.
Permissions	The permissions on folders for the selected user or group is displayed.	For more information, see Setting User/Group Permissions, Setting Default Global Permissions.

4.1.1 OCM Data Security and New Content Items Folder Profile Options

The data security and new content items folder profile options are important for the smooth functioning of OCM.

Data Security

The data security profile option disable or enable security in OCM. By default, data security is disabled. Folder permissions will be effective only when the data security profile is `Y`.

At any time, if the data security profile is enabled, you must ensure that the necessary folder permissions are set for the users accessing the application.

New Content Items Folder

Apart from enabling data security, you must also specify the folder in which new content items will be stored. Set the option for the IBC: Folder/Directory for new items profile to point to an appropriate folder. Even if the security profile is set to `N`, this value should be set to specify which folder the new content items must be stored in. If no value is specified, the application will create new items under the COMMON folder.

The users must have appropriate permissions to create items in the folder set in the profile, or in the COMMON folder, if the profile is not set.

Note: You must set these profile options for content items to be created and submitted properly.

Table 4–2 explains the data security profiles.

Table 4–2 Data Security Profiles

Profile Name	Default Value	Comments
IBC: Use Access Control	N	Data security is disabled. Any user can create, update or delete a content item. All content items created are immediately approved. If set to `Y`, data security is enabled. A check is made to see if the user has appropriate permissions to perform an action.
IBC: Folder/Directory for new items	COMMON	Specifies the folder where new content items are created. **Note:** If data security is enabled, the user must have the required permissions to perform the necessary tasks from this folder. For example, if John's IBC:Folder/Directory is CRM, John must have permission to create, update, and delete on this folder. Permissions can be granted from the Foldering tab. See Setting Up Foldering Security to grant permissions on folders.

See Also

- Section 4.5, "Data Security Behavior" for detailed information on data security behavior.
- For details on all OCM profiles, see the *Oracle Content Manager Implementation Guide,* Oracle Content Manager Profile Options and Lookups.

4.1.2 Setting Up Foldering Security

When data security is enabled by setting the IBC: Use Access Control profile to `Y`, each user must be granted specific privileges that can be performed on each folder. To assign these permissions, use the following procedure.

Prerequisites

None

Responsibility

OCM Super User

Navigation

Foldering > Workgroup Folder Permissions page

Steps

1. Select the user or group to set permissions for.
2. To grant permissions, select the check boxes for the appropriate permission and folder in the table.
3. To remove a permission, clear the appropriate check box.
4. Click **Submit**.

4.2 Viewing Permissions for a User or Group

Permissions are granted to users or a group of users on selected folders. Use the following procedure to view permissions set for a particular user or group.

Prerequisites

None

Responsibility

OCM Super User

Navigation

Foldering > Workgroup Folder Permissions page

Steps

1. Select your option using the Select drop-down list.

   The options available are `User` and `Group`.
2. Click the Search icon.

   The Search and Select List of Values pop-up window appears.
3. Enter the user or group name partly or fully in the Search By field.

   You can use the `%` wildcard, if required.
4. Click **Go**.

   The search results appear in the Results region.

5. Select the user or group to set permissions for.
6. Click **Select**.

   The name of the selected user or group is displayed in the Select field.
7. Click **Go**.

   The permissions for the user or group is displayed in the Results region.

4.3 Setting User/Group Permissions

Groups are JTF resource groups. For more information on setting up JTF resource groups, see the *Oracle JTF User Guide*.

Permissions can be granted to users and groups. Default permissions can also be set.

- **Users**: Select from the LOV. The list of users is displayed from FND USERS.
- **Groups**: Select from the LOV. The list of groups is displayed from JTF Resource Groups.
- **Default Permissions**: These are permissions that are applicable by default. If a user has not been given specific permissions, the default permissions are used, provided functional access has been granted.

Permissions are a union of User, Group, and Default permissions. If a user has certain permissions, and other permissions because the user is a member of a group, then all these permissions are added.

Permissions are granted to users or a group of users on selected folders. The permissions that can be granted are:

- Create/Update/Remove/Restore - A user can perform all these operations from the My Content tab.
- Approve - A user can approve content items from the Pending Approvals tab.
- Translate - A user can translate or upload translations from the Translations tab.
- Delete - A user can delete content items permanently from the Trash tab.

Note: Ensure that the user has the `Create` permission on the folder that is set for the IBC: Folder/Directory for new items profile.

Example

User John is in group CRM. John has individual permissions to Approve content items.

Group CRM has permissions to Translate only.

Default permissions are to enable users to create, update, remove, restore, and delete content items.

Therefore, when John logs in, he will be able to create, update, remove, restore, delete, translate, and approve content items. See Table 4–3 for the matrix.

Table 4–3 Sample Permissions Matrix on Folder A

User/Group/ Permission	Create/Update/ Remove/Restore	Approve	Translate	Delete
User John	-	X	-	-
Group CRM (John belongs to this group)	-	-	X	-
Default Permissions	X	-	-	X
Final Permissions for John	X	X	X	X

> **Note:** The IBC: Folder/Directory for new items profile must be set to Folder A to enable John to create content items.

Use the following procedure to set permissions for a user or group.

Prerequisites

None

Responsibility

OCM Super User

Navigation

Foldering > Workgroup Folder Permissions page

Steps

1. Select the user or group to set permissions for.
   a. Select your option using the Select drop-down list.
   b. Click the Search icon.

      The Search and Select List of Values pop-up window appears.
   c. Enter the user or group name partly or fully in the Search By field.

      You can use the `%` wildcard, if required.
   d. Click **Go**.

      The search results appear in the Results region.
   e. Select the user or group to set permissions for.
   f. Click **Select**.

      The name of the selected user or group is displayed in the Select field.
   g. Click **Go**.

      The permissions for the user or group is displayed in the Results region.
2. To grant permissions, select the check boxes for the appropriate permission and folder in the table.

   To remove a permission, clear the appropriate check box.

   Note: Grant the `Create` permission to the folder which is set as the value for the IBC: Folder/Directory for new items profile.
3. Click **Submit**.

4.4 Setting Default Global Permissions

OCM allows permissions to be given at a global level without individually granting them to users or groups. If specific permissions are not granted to a user or group, the default permissions are used, provided functional access to the appropriate tabs have been granted.

Prerequisites

None

Responsibility

OCM Super User

Navigation

Foldering > Workgroup Folder Permissions page

Steps

1. By default, this page displays the Default Global Permissions.
2. To grant permissions, select the check boxes for the appropriate permission and folder in the table.

   To remove a permission, clear the appropriate check box.
3. Click **Submit**.

   These will be the basic set of permissions that are applicable to any user or group.

4.5 Data Security Behavior

Table 4–4 illustrates data security behavior when it is enabled and disabled.

Table 4–4 Data Security Behavior

Security	My Content	Pending Approvals	Translations	Trash
Enabled	Shows content items from folders to which the user has Create, Update, Remove, and Restore permission. Items will be created in the folder specified by the IBC: Folder/Directory for new items profile.	Shows content items from folders to which the user has the Approve permission. Notifications are sent to users whenever items are created in these folders. If the user is also the creator of the content item and has the Approve permission on the folder where the item is created, the item's status is set to `Approved`.	Shows approved content items requiring translation from folders to which the user has the Translate permission.	Shows content items from folders on which the user has Restore or Delete permission.
Disabled	Shows all content items stored in the system. Any user can modify any content item. New content items are created in the folder specified by the IBC: Folder/Directory for new items profile.	Shows content items from folders where the user is the owner. If the user is the creator as well, the content item's status is set to `Approved`.	Shows all approved content items that require translation.	Shows content items removed from any folder. The user can restore or delete any content item.

5

Managing Content Items

This chapter discusses the tasks that you can perform from the My Content tab. Sections in this chapter include:

- Section 5.1, "Overview"
- Section 5.2, "Creating a Content Item"
- Section 5.3, "Updating a Content Item"
- Section 5.4, "Updating Earlier Versions of a Content Item"
- Section 5.5, "Submitting a Content Item"
- Section 5.6, "Uploading Images in Bulk"
- Section 5.7, "Making a New Version of a Content Item"
- Section 5.8, "Making a Duplicate of a Content Item"
- Section 5.9, "Previewing a Content Item"
- Section 5.10, "Viewing Content Items of a Particular Status"
- Section 5.11, "Viewing Content Item Details"
- Section 5.12, "Viewing Item Usage"
- Section 5.13, "Viewing Item History"
- Section 5.14, "Viewing Versions of a Content Item"
- Section 5.15, "Viewing Content Item Associations"
- Section 5.16, "Finding a Content Item"
- Section 5.17, "Removing a Content Item"

5.1 Overview

The My Content tab is the main workarea for content creators. You can create different types of content — from a text field to an image, audio, or a video file. You can create content items ranging from simple items such as image items to more complex compound items comprising multiple sub-items. Use this tab as your workspace to create and update content items.

Note: The content items and tabs that are displayed, and the actions that you can perform in Oracle Content Manager (OCM) are solely dependent upon the data and functional security access that you have. For more information, see Chapter 4, "Managing Folder Permissions and Data Security".

Table 5–1 describes the components of the My Content tab, and the tasks that you can perform as a content creator.

Table 5–1 My Content Tab Fields

Name	Description	Reference
Simple Search	You can search for content items by specifying the content item type and content item name.	For more information, see Using Simple Search.
Advanced Search	Click **Advanced Search** to search for content items based on several parameters such as Status, Owner, and Last Update Date. The search can also span multiple versions of a content item.	For more information, see Using Advanced Search.
Views	Click **Views** to view content items of a certain status. For instance, you can view content items with the `Approved` status, with the most recent items shown first.	For more information, see Viewing Content Items of a Particular Status
Create Content Item	Click **Create Content Item** to create a content item.	For more information, see Creating a Content Item.
Update	Click **Update** to update a selected content item.	For more information, see Updating a Content Item.
Bulk Image Upload	Click **Bulk Image Upload** to upload multiple image files.	For more information, see Uploading Images in Bulk

Table 5–1 My Content Tab Fields

Name	Description	Reference
Make Version	Click **Make Version** to create a new version of the selected content item.	For more information, see Making a New Version of a Content Item.
View Versions	Click **View Versions** to view the selected content item's version history.	For more information, see Viewing Versions of a Content Item.
Duplicate	Click **Duplicate** to make a copy of the selected content item. The duplicate is now a new item with version 1.	For more information, see Making a Duplicate of a Content Item.
Preview	Click **Preview** to view the selected content item.	For more information, see Previewing a Content Item.
Hyperlinked Content Item	Click the hyperlink to view the content item's details.	For more information, see Viewing Content Item Details.
Remove	Click **Remove** to remove the content item. **Note:** The item is not deleted permanently. You can restore it from the Trash tab.	For more information, see Removing a Content Item.

5.2 Creating a Content Item

A content item can be anything from a text field to an image, audio, or a video file. For instance, a product manager could describe a product's functionality in a text field, and a marketing personnel may create an attractive video file to market a product.

Use the following procedures to create a content item. Once the content item is created, it must be approved before it may be published.

Creating a content item is a two step process:

- Choosing the Content Type
- Providing Content Details

5.2.1 Choosing the Content Type

The first step to creating a content item is to choose the type of content that you will be creating. You can create content items of different types such as Image, HTML

Page, Audio, and Video. Use the following procedure to select the content type for a content item.

Prerequisites

None

Responsibility

Content Item Creator

Content Item Approver

OCM Super User

Navigation

Content > My Content > My Content page

Steps

1. From the My Content tab's Results region, click **Create Content Item**.

   The Create Content: Basic Information page appears.

2. Use the Content Type drop-down list to select a content type for your content item.

   Only content types with the `Active` status are displayed in the drop-down list.

3. Enter a name in the Content Item Name field.
4. Enter the description of the content item in the Content Item Description field.
5. Click **Next**.

   The Create Content: Content Details page appears.

6. Optionally, click **Save for Later**.

   The content item is created with the status as **In Progress**. This option allows you to create an item, and update it later. For more information on updating a content item, see Updating a Content Item.

5.2.2 Providing Content Details

You can provide details of the content item in the Create Content:Content Details page. The page may have two or more regions depending on the content type - the Content Type: <*content type name*> and the Add Content Items from Library regions. Both these regions correspond to the content type selected. The Meta Information region remains the same irrespective of the content type.

Use the following procedure to provide content details for a content item.

Prerequisites

You should have chosen the content type. For more information on choosing the content type, see Choosing the Content Type.

Responsibility

Content Item Creator

Content Item Approver

OCM Super User

Navigation

Content > My Content > My Content page

Steps

> **Note:** The exact fields shown in the first two regions of the Create Content:Content Details page are dependent on the content type chosen in step 2 of Choosing the Content Type procedure.

1. In the Create Content:Content Details page, enter necessary details in the first region that corresponds to the content type.

   Note:

   - Use the http://www format for a URL. For example, http://www.oracle.com.
   - For content items of type Stylesheet, select only files with a `.xsl` extension as a Stylesheet Attachment.
   - For content items of type HTML, select only files with `.html` or `.htm` extension as a HTML Attachment.
   - For content items of type Image, the height and width of the image is auto-detected.

2. In the Add Content Items from Library region, select the content item(s) to be a part of this content item.

   Note: This region is visible only if the content item is a compound content item.

   a. Click the **Search** icon to select a content item.

      Only approved content items are listed.

   b. To add another content item as an attribute, select the appropriate content type row. Click **Add New Attribute**.

   c. Optionally, if the content type is Image, you can *quick create* a content item. Click the icon from the Quick Create column.

Note: Rows with an asterisk are mandatory.

---

3. In the Meta Information region, enter the required details.

   a. To change the content owner, click the **Search** icon next to the Owner field.

   b. Click the **Calendar** icon to select a date from when the content items will be available for use.

   c. Click the **Calendar** icon to select a date till when the content items will be available for use.

      Note: If the above dates are left blank, the content items never expire, and are always available.

   d. Select the Translation Required check box to indicate that the content item must be translated.

   e. Enter a unique value in the Content Item Code field.

      The code can be alphanumeric, and can be used to search for a content item. For more information, see Using Advanced Search.

4. Click **Submit**.

   The Confirmation page appears. The content item is created successfully, and is submitted for approval. However, if you have the Approve permission on the folder where the content item is stored, the item is saved as `Approved`.

5. Optionally, click **Save for Later**.

The content item is created with the status as **In Progress**. This option allows you to create an item, and update it later. For information on updating a content item, see Updating a Content Item.

5.3 Updating a Content Item

You can update a content item, and submit it for approval. When you select a content item to update, you are working on the latest version of the item. Use the following procedure to update the latest version of a content item.

To update an earlier version, see Updating Earlier Versions of a Content Item.

Prerequisites

You can update a content item only when the item's version status is one of the following:

- In Progress
- Rework

Note: A content item in the Approved or Submitted states cannot be updated. You may only make a version of such a content item. For more information on making a version, see Making a New Version of a Content Item.

Responsibility

Content Item Creator

Content Item Approver

OCM Super User

Navigation

Content > My Content > My Content page

Steps

1. From the My Content tab's Results region, select the content item you want to update.
2. Click **Update**.

The Update <*content item name*>:Content Details page appears. The content item is now locked, and other users cannot perform any operation on it.

Note: The exact fields shown in this page are dependent on the content type being updated.

---

3. Make changes as required.
4. Optionally, click the **Versions** side navigation link to view the item's previous versions.

   The <*content item name*>:Versions page appears
5. Optionally, click the **Item Usage** side navigation link to view the item's usage.

   The <*content item name*>:Usage page appears.
6. Optionally, click the **Item History** side navigation link to view the item's history.

   The <*content item name*>:History page appears.
7. Optionally, click the **Associations** side navigation link to view the item's associations.

   The <*content item name*>:Associations page appears. If the content item is associated with another E-Business Suite object such as iStore or Campaigns, the details are displayed.

   Note: You cannot create associations with another E-Business Suite object from OCM. You can only view associations.
8. To save and submit the changes for approval, click **Submit**.

   The Confirmation page appears.

   Note: A compound content item is approved only after all its sub-items are also approved.
9. Optionally, click **Save for Later** to update the content item details later. The content item is saved with the status as `In Progress`.
10. Optionally, click **Cancel** to cancel the update. The content item is not saved.

5.4 Updating Earlier Versions of a Content Item

You can update any of the earlier versions of a content item, and submit it for approval. Use the following procedure to update an earlier version of a content item.

To update the latest version, see Updating a Content Item.

Prerequisites

You can update a content item only when the item's status is one of the following:

- In Progress
- Rework

Responsibility

Content Item Creator

Content Item Approver

OCM Super User

Navigation

Content > My Content > My Content page

Steps

1. From the My Content tab's Results region, select the content item whose version you want to update.
2. Click **View Versions**.

   The Update <*content item name*>:Versions page appears. The various versions of the content item are listed. The version that is currently live has `Live` displayed in the Live column.
3. Select the version to update, and click **Update**.

   The Update <*content item name*>:Versions page appears. The content item is now locked, and other users cannot perform any operations on it.

   For more details on updating a content item, see Updating a Content Item.
4. Optionally, to preview a version, select the version, and click **Preview**.

   The content item is displayed in its default stylesheet.

5. Optionally, to make a version live, select the version, and click **Make Live**.

   Note: Only an approved version can be made live.

6. Optionally, to make another version, select the version, and click **Copy**.

   A new version is created. You can update this version.

7. Optionally, to delete a version, click the **Delete** icon.

   Note: You cannot delete if the Version Status is `Submitted` or `Approved`.

8. Optionally, click **Cancel** to cancel the update. The content item is not saved.

5.5 Submitting a Content Item

When a content item is submitted, the content item is saved and one of two things happen:

- A notification is sent to the approvers - The designated approvers are informed by means of a notification that a content item has been submitted for approval.
- The content item is saved with the status as `Approved` - If the content item creator has the Approve permission on the folder where the content item is stored, the item is saved as Approved.

5.6 Uploading Images in Bulk

You can upload multiple images to the content repository. Each of these images become content items of content type Image. The content item names will be the names of the image files that you upload. Use the following procedure to upload multiple images.

Prerequisites

You can upload only a .zip or a .ZIP file. Make sure you zip the image files before performing this task.

Responsibility

Content Item Creator

Content Item Approver

OCM Super User

Navigation

Content > My Content > My Content page

Steps

1. From the My Content tab's Results region, click **Bulk Image Upload**.

   The Bulk Image Upload: Create Content page appears.

2. From the Content Type:Image section, click the **Search** icon next to the Source File field, to select the zipped file to upload.

   The Attachment Selector window is displayed.

3. Click **Browse** to locate the file.

   The Choose File dialog box is displayed.

4. Select the .ZIP or .zip file, and click **Open**.

   The path to the file is displayed in the Location field in the Attachment Selector window.

5. Click **Submit**.

   The "Uploading file...Please wait" message is displayed. Once the file is uploaded, the path to the file appears in the Select File field in the Bulk Image Upload:Create Content page.

6. In the Meta Information region, enter the required details.

   a. To change the content owner, click the **Search** icon next to the Owner field.

   b. Click the **Calendar** icon to select a date from when the content items will be available for use.

   c. Click the **Calendar** icon to select a date till when the content items will be available for use.

   d. Select the **Translation Required** check box to indicate that the content items must be translated.

7. Click **Next**.

   The Bulk Image Upload: Review page is displayed. The Upload Summary displays the number of valid and invalid files uploaded, and the status of each file. Invalid files will be ignored.

   Note: Valid file formats are .gif, .jpg, .jpeg, and .png.

8. Change the names of the files, if required. The content items will have the same name.
9. Click **Submit**.

   The Confirmation page appears. The content items are created successfully, and are submitted for approval. However, if you have the Approve permission on the folder where the content item is stored, the item is saved as Approved.

5.7 Making a New Version of a Content Item

You can make a new version by selecting the latest version of an existing content item. The new version is created on the basis of the selected content item. Use the following procedure to make a new version of a content item successfully.

Prerequisites

None

Responsibility

Content Item Creator

Content Item Approver

OCM Super User

Navigation

Content > My Content > My Content page

Steps

1. From the My Content tab's Results region, select the content item to make a new version.
2. Click **Make Version**.

   The Update <*content item name*>:Content Details page appears. Notice that the version number is incremented by one. The version number is displayed in the Version field.
3. To update the content item details, make changes as required.
4. Optionally, click **Next** to view other versions of this content item.

   The <*content item name*>:Versions page appears.

5. Optionally, click the Item Usage side navigation link to view the item's usage.

   The <*content item name*>:Usage page appears.

6. Optionally, click the Item History side navigation link to view the item's history.

   The <*content item name*>:History page appears.

7. Optionally, click the Associations side navigation link to view the item's associations.

   The <*content item name*>:Associations page appears. If the content item is associated with another E-Business Suite object such as iStore or Campaigns, the details are displayed.

8. To save and submit the changes for approval, click **Submit**.

   The Confirmation page appears. The new version is created, and the content item is submitted for approval. However, if you have the Approve permission on the folder where the content item is stored, the item is saved as Approved.

9. Optionally, click **Save for Later** to update the content item details at a later time.

   The content item is saved with the status as `In Progress`.

10. Optionally, click **Cancel** to cancel making a new version. The new version is not created.

5.8 Making a Duplicate of a Content Item

You can copy the latest version of a content item to make a duplicate. The duplicate item is a new item with version 1. Any translations and earlier versions of the content item are not duplicated. Use the following procedure to duplicate a content item successfully.

Prerequisites

None

Responsibility

Content Item Creator

Content Item Approver

OCM Super User

Navigation

Content > My Content > My Content page

Steps

1. From the My Content tab's Results region, select the content item you want to duplicate.
2. Click **Duplicate**.

   The Update <*content item name*>:Content Details page appears. The contents displayed here are the same as the details of the original content item.

   > **Note:** The exact fields shown in this page are dependent on the content type of the item that was duplicated.

3. Make changes as required.
4. Optionally, click the **Versions** side navigation link to view the item's previous versions.

   The <*content item name*>:Versions page appears
5. Optionally, click the **Item Usage** side navigation link to view the item's usage.

   The <*content item name*>:Usage page appears.
6. Optionally, click the **Item History** side navigation link to view the item's history.

   The <*content item name*>:History page appears.
7. Optionally, click the **Associations** side navigation link to view the item's associations.

   The <*content item name*>:Associations page appears. If the content item is associated with another E-Business Suite object such as iStore or Campaigns, the details are displayed.
8. To save and submit the changes for approval, click **Submit**.

   The Confirmation page appears. The content item is now submitted for approval. However, if you have the Approve permission on the folder where the content item is stored, the item is saved as Approved.
9. Optionally, click **Save for Later** to update the content item details at a later time.

The content item is saved with the status as `In Progress`.

10. Optionally, click **Cancel** to cancel creating a duplicate. A duplicate content item is not created.

5.9 Previewing a Content Item

You can preview a content item in its default stylesheet. A stylesheet takes the information entered during content item creation and makes it displayable to end users. The end user will see a neat HTML page, rather than a bunch of fields. A stylesheet indicates to the browser how to render information that the database provides. Use the following procedure to preview a content item.

Prerequisites

The content type of this content item must be mapped to a stylesheet. For more information on mapping stylesheets, see Mapping Stylesheets to a Content Type.

Responsibility

Content Item Creator

Content Item Approver

OCM Super User

Navigation

Content > My Content > My Content page

Steps

1. From the My Content tab's Results region, select the content item to preview.
2. Click **Preview**.

   The content item is displayed in its default stylesheet.

5.10 Viewing Content Items of a Particular Status

Use the following procedure to view content items of a selected status.

Prerequisites

None

Responsibility

Content Item Creator

Content Item Approver

OCM Super User

Navigation

Content > My Content > My Content page

Steps

1. From the My Content tab's Simple Search region, click **Views**.

   The My Content Views page appears.

2. Use the Views drop-down list to select a status.
3. Click **Go**.

   All content items with the selected status are displayed in the Results region at the bottom of the page.

5.11 Viewing Content Item Details

You can view a content item's history, usage, and versions besides its details. Use the following procedure to view a content item's details.

Prerequisites

None

Responsibility

Content Item Creator

Content Item Approver

OCM Super User

Navigation

Content > My Content > My Content page

Steps

1. From the My Content tab's Results region, select the content item to view its details.
2. In the **Content Item** column, click the hyperlinked content item name.

   The Content Items Details:<*content item name*> page appears displaying the details of the item.
3. Optionally, to preview the content item, click **Preview**.

   The content item is displayed in its default stylesheet.
4. Optionally, to view the item's history, click **View History**.

   The <*content item name*>:Item History page appears. You can view the various stages that the content item has passed through so far.
5. Optionally, to view the item's usage, click **Item Usage**.

   The <*content item name*>:Item Usage page appears displaying content items that are currently using the selected item.
6. Optionally, to view the item's previous versions, click **View Versions**.

   The <*content item name*>: Versions page appears displaying the versions, their statuses, and the current Live version.
7. If the content item is compound, you see the Added Items from Library region displaying other content items that are part of this content item. From the Added Items from Library region-
   a. Click the **Preview** icon to preview any attachments with the content item.
   b. Click the **Download** icon to download any attachments with the content item.
8. If the content item is associated with another E-Business Suite object, the Associations regions is displayed with the details.

5.12 Viewing Item Usage

A content item can become a part of a compound content item. As a content creator, you can view the compound content items that are currently using the selected content item.

You can view the item's usage before you update a content item. By viewing the item's usage, you can see the other items that will be affected by modifying it. Use the following procedure to view a content item's usage.

Prerequisites

None

Responsibility

Content Item Creator

Content Item Approver

OCM Super User

Navigation

Content > My Content > My Content page

Steps

1. From the My Content tab's Results region, click the hyperlinked content item name in the **Content Item** column.

   The Content Items Details:<*content item name*> page appears displaying the details of the item.

2. Click **Item Usage**.

   The <*content item name*>: Item Usage page appears. You can see the name, type, and owner of the content items that are currently using the item that you selected. Also, the current live version and the latest approved version numbers are displayed.

5.13 Viewing Item History

You can view the various stages that the content item has passed through by viewing its history. When a content item is rejected by the approver, its status changes to `Rework`. For such items, the history page displays the comments inserted by the approver while rejecting the item.

Use the following procedure to view a content item's history.

Prerequisites

None

Responsibility

Content Item Creator

Content Item Approver

OCM Super User

Navigation

Content > My Content > My Content page

Steps

1. From the My Content tab's Results region, click the hyperlinked content item name in the Content Item column.

   The Content Items Details:<*content item name*> page appears displaying the details of the item.

2. Click **View History**.

   The <*content item name*>: Item History page appears displaying the various actions that have been performed on the item so far, who performed them, and the status.

3. To view comments by the approver for an item with the `Rework` status, click the **Comments** icon.

5.14 Viewing Versions of a Content Item

You can view the various versions of a content item. Use the following procedure to view a content item's versions.

Prerequisites

None

Responsibility

Content Item Creator

Content Item Approver

OCM Super User

Navigation

Content > My Content > My Content page

Steps

1. From the My Content tab's Results region, click the hyperlinked content item name in the Content Item column.

   The Content Items Details:<*content item name*> page appears displaying the details of the item.

2. Click **View Versions**.

   The <*content item name*>: Versions page appears displaying the versions, their statuses, and the current Live version.

3. Optionally, to preview any of the versions, click the hyperlinked version number from the Versions column.

   The Content Item Details:<*content item name*> page appears. You may also preview this version of the content item.

5.15 Viewing Content Item Associations

OCM content items can be associated with E-Business Suite objects. However, the association cannot be performed from OCM. You can view the objects with which OCM content items are associated.

You can view a content item's association with an E-Business Suite object when you perform any of the following tasks:

- Section 5.3, "Updating a Content Item"
- Section 5.7, "Making a New Version of a Content Item"
- Section 5.8, "Making a Duplicate of a Content Item"
- Section 5.11, "Viewing Content Item Details"

5.16 Finding a Content Item

- Using Simple Search
- Using Advanced Search

5.16.1 Using Simple Search

You can locate a content item by performing a simple search based on the content type and content item name. Use the following procedure to locate a content item successfully.

Prerequisites

None

Responsibility

Content Item Creator

Content Item Approver

OCM Super User

Navigation

Content > My Content > My Content page

Steps

1. From the My Content tab's Search region, use the Search drop-down list to select a content type.
2. Enter the name of the content item.
3. Click **Go**.

   The search results appear in the Results region.

5.16.2 Using Advanced Search

Use the Advanced Search utility to locate a content item by providing specific details that narrow down your search. Use the following procedure to search for a content item using advanced search.

Note: Search results display content items only from folders where you have permissions. For more information, see Chapter 4, "Managing Folder Permissions and Data Security".

Prerequisites

None

Responsibility

Content Item Creator

Content Item Approver

OCM Super User

Navigation

Content > My Content > My Content page

Steps

1. From the My Content tab's Search region, click **Advanced Search**.

   The My Content Advanced Search page appears.

2. Provide the details of the content item you are searching for in the respective fields.

   See Table 5–2, "Advanced Search Page Fields" for field details.

3. Click **Search**.

   The search results appear in the Results region.

Reference

Table 5–2 describes the fields in the Advanced Search page.

Table 5–2 Advanced Search Page Fields

Name	Description
Content Item Name	Name of the content item. Use the drop-down list to select the condition, and enter the name or any part of the name of the content item.
Content Item Description	Description of the content item. Use the drop-down list to select the condition, and enter the description.
Content Type	Type of the content item. Use the drop-down list to select the type.

Table 5–2 Advanced Search Page Fields

Name	Description
Source File Name	Name of the file attachment that you may have uploaded along with the content item. Use the drop-down list to select the condition, and enter the name of the source file.
Creator	Name of the user who created the content item. Click the **Search** icon to select the user.
Owner	Name of the owner. The owner may be different from the creator in some cases. For example, the creator's manager may be the owner. Click the **Search** icon to select the user.
Locked By	A content item is locked when a user is creating or modifying it. Use the drop-down list to select the user who may have locked the content item you are searching for.
Creation Date	Date on which the content item was created. Use the drop-down list to select the condition, and enter the date. Optionally, click the **Calendar** icon to select the date.
Available Date	Date when the content item was approved, and is available for use. Use the drop-down list to select the condition, and enter the date. Optionally, click the **Calendar** icon to select the date.
Expiration Date	Date till when the content item can be published. Use the drop-down list to select the condition, and enter the date. Optionally, click the **Calendar** icon to select the date.
Last Update	Date on which the content item was last modified. Use the drop-down list to select the condition, and enter the date. Optionally, click the **Calendar** icon to select the date.
Item Status	Status of the content item. Use the drop-down list to select the status.

Table 5–2 Advanced Search Page Fields

Name	Description
Item Code	The item's unique number entered while creating the content item. Enter the item code or any part of the item code.
Search All Versions	Select the check box to include all previous versions of the content item in the search.

5.17 Removing a Content Item

You can remove a content item that is not required. If the removed content item has any sub-items, the sub-items are not removed.

A removed content item is not deleted permanently. It is merely moved to the Trash tab from where it can be restored, if need be. Use the following procedure to remove a content item successfully.

Prerequisites

A content item cannot be removed if:

- either its or one of its version's status is `Submitted`.
- it is a sub-item of a compound content item.
- it is associated with an E-Business Suite object.
- it is a seeded content item.

Responsibility

Content Item Creator

Content Item Approver

OCM Super User

Navigation

Content > My Content > My Content page

Steps

1. From the My Content tab's Results region, select the content item to remove.
2. Click **Remove**.

A message appears asking you to confirm the removal.

3. Click **OK**.

   The content item is moved to the Trash tab. The user with appropriate privileges can restore the item from the Trash tab, if required.

6

Using the Content Item Library

This chapter discusses tasks that you can perform from the Library tab. Sections in this chapter include:

6.1 Overview

The Library tab enables all Oracle Content Manager (OCM) users to view the live and approved versions of content items.

Table 6–1, describes the components of the Library tab, and the tasks that you can perform in the tab.

Table 6–1 Library tab fields

Name	Description	Reference
Simple Search	You can search for content items by specifying the name of the content item.	For more information, see Using Simple Search.
Advanced Search	Click **Advanced Search** to search for content items based on parameters such as Creator, Submitted Date, and Last Update.	For more information, see Using Advanced Search.
Content Type region	Click the hyperlinked content type name to view a list of live and approved content items belonging to the selected content type.	For more information, see Viewing Content Items by Content Type.

6.2 Viewing Content Items by Content Type

You can view live and approved content items by their type. The OCM Library displays only those content items that are not expired. A content item expires based on the Expiration Date specified while creating it.

Use the following procedure to view content items by their type.

Prerequisites

None

Responsibility

Content Item Creator

Content Item Approver

OCM Super User

Library User

Translator

Navigation

Content > Library> Library page

Steps

1. From the Library tab's Content Type region, click the hyperlinked content type name.

   The Content Type:<*content type name*> page appears. You can see the content items that are live and approved for this content type listed in the Content Items region.

2. Click the hyperlinked content item name to view its details.

   The Content Item Details:<*content item name*> page appears.

   a. To preview the content item, click **Preview**.

   b. To download any attachments in the content item, click **Download**.

   c. To view translations of the item, click **View Translations**.

3. To preview the content item's details in its default stylesheet, click the Preview icon.

4. If the content item is compound, you see the Added Items from Library region displaying the content items that are part of this content item. From the Added Items from Library region-
   a. Click the **Preview** icon to preview any attachments with the content item.
   b. Click the **Download** icon to download any attachments with the content item.

6.3 Finding a Content Item

- Section 6.3.1, "Using Simple Search"
- Section 6.3.2, "Using Advanced Search"

6.3.1 Using Simple Search

You can locate a content item by performing a simple search based on the name of the content item. Use the following procedure to locate a content item successfully.

Prerequisites

None

Responsibility

Content Item Creator

Content Item Approver

OCM Super User

Library User

Translator

Navigation

Content > Library> Library page

Steps

1. From the Library tab's Simple Search region, enter the name of the content item in the Search field.
2. Click **Go**.

The search results are displayed in the Results region with the item name, owner, and the last updated date.

3. Optionally, to search based on the content type, click the hyperlinked content item type in the Content Types region of the Library page.

   The Content Type:<*content item name*> page appears. The content items that are live and approved, and match the content type you selected are displayed in the Content Items region.

   a. To further narrow your search, enter the name of the content item in the Search field.

   b. Click **Go**.

      The search results appear in the Results region at the bottom of the page.

6.3.2 Using Advanced Search

You can use the Advanced Search utility to locate a content item by providing specific details that narrow down your search. Use the following procedure to search for a content item using the advanced search utility.

Prerequisites

None

Responsibility

Content Item Creator

Content Item Approver

OCM Super User

Library User

Translator

Navigation

Content > Library> Library page

Steps

1. From the Library tab's Simple Search region, click **Advanced Search**.

   The Library Advanced Search page appears.

2. Provide details of the content item that you are searching for in the respective fields.

   See Table 6–2, "Advanced Search Page Fields" for field details.

3. Click **Search**.

   The search results appear in the Results region at the bottom of the page.

References

Table 6–2 describes the fields in the Advanced Search page.

Table 6–2 Advanced Search Page Fields

Name	Description
Content Item Name	Name of the content item. Use the drop-down list to select the condition, and enter the name or any part of the name of the content item.
Content Item Description	Description about the content item. Use the drop-down list to select the condition, and enter the description.
Content Type	Type of the content item. Use the drop-down list to select the type.
Source File Name	Name of the file attachment that you may have uploaded along with the content item. Use the drop-down list to select the condition, and enter the name of the source file.
Creator	Name of the user who created the content item. Click the **Search** icon to select the user.
Owner	Name of the owner. The owner may be different from the creator in some cases. For example, the creator's manager may be the owner. Click the **Search** icon to select the user.
Creation Date	Date on which the content item was created. Use the drop-down list to select the condition, and enter the date. Optionally, click the **Calendar** icon to select the date.

Table 6–2 Advanced Search Page Fields

Name	Description
Available Date	Date when the content item was approved. Use the drop-down list to select the condition, and enter the date. Optionally, click the **Calendar** icon to select the date.
Expiration Date	Date till when the content item can be published. Use the drop-down list to select the condition, and enter the date. Optionally, click the **Calendar** icon to select the date.
Last Updated Date	Date on which the content item was last modified. Use the drop-down list to select the condition, and enter the date. Optionally, click the **Calendar** icon to select the date.

7 Managing Pending Approvals

This chapter discusses tasks that you can perform from the Pending Approvals tab. Sections in this chapter include:

7.1 Overview

The Pending Approvals tab lists all content items in Oracle Content Manager (OCM) that require approval. Once they have been processed by the approver(s), they are removed from this tab. Approvers receive notifications via e-mail alerting them that a content item requires approval. Approvals are required to ensure content completeness and accuracy.

> **Note:** The content items and tabs that are displayed, and the actions that you can perform in OCM are solely dependent upon the data and functional security access that you have. For more information, see Chapter 4, "Managing Folder Permissions and Data Security".

Table 7–1, describes the components of the Pending Approvals tab, and the tasks that you can perform from here.

Table 7–1 Pending Approval Tab Fields

Name	Description	Reference
Pending Approvals Summary region	All content items for which approvals are pending are listed.	-
Approve	Click **Approve** to approve a content item.	For more information, see Approving a Content Item.
Reject	Click **Reject** to reject a content item.	For more information, see Rejecting a Content Item.
Preview	Click the **Preview** icon to view the content item in its default stylesheet.	For more information, see Previewing a Content Item.
Hyperlinked Content Item	Click the hyperlink to view the content item's details.	For more information, see Viewing Content Item Details.

7.2 Notifications Sent to Approvers

Approvers receive a notification when a content item has been submitted for approval. OCM uses Oracle Workflow to send notifications to designated approvers. Oracle Workflow must be configured and the Workflow Mailer must be set up for the notifications to be sent as e-mails. The users can also log in to the Self-Service Applications to view workflow notifications. For more information on configuring Oracle Workflow, see the *Oracle Workflow Administrator's Guide*.

7.3 Approving a Content Item

As an approver, you are responsible to ensure content completeness and accuracy. Use the following procedure to approve a content item.

Prerequisites

None

Responsibility

Content Item Approver

OCM Super User

Navigation

Content > Pending Approvals > Pending Approvals Summary page

Steps

1. From the Pending Approvals tab, select the content item to approve.

   You may select multiple content items to approve.

2. Click **Approve**.

   A notification is sent to the content item creator and the owner that the item has been approved.

7.4 Rejecting a Content Item

As an approver, your role is to ensure content completeness and accuracy. Sometimes, you may have to reject a content item that does not meet standards. When a content item is rejected, its status is changed to `Rework`. Use the following procedure to reject a content item.

Prerequisites

None

Responsibility

Content Item Approver

OCM Super User

Navigation

Content > Pending Approvals > Pending Approvals Summary page

Steps

1. From the Pending Approvals tab, select the content item you want to reject.

   You may select multiple content items to reject.

2. Click **Reject**.

   The Pending Approvals: Comments page appears.

3. Enter your comments in the space provided.

   You must state the reason(s) for rejecting the content item(s).

4. Click **Submit**.

   If you selected multiple items to reject, the comments entered apply to all of them.

7.5 Previewing a Content Item

You may want to preview a content item before deciding to approve it. When previewed, the content item is displayed in its default stylesheet.

A stylesheet takes the information entered during content item creation and makes it displayable to the end user. The end user will see a neat HTML page, rather than a bunch of fields. A stylesheet indicates to the browser how to render the information that the database provides. Use the following procedure to preview a content item.

Prerequisites

The content item must be mapped to a stylesheet. For more information on mapping stylesheets, see Mapping Stylesheets to a Content Type.

Responsibility

Content Item Approver

OCM Super User

Navigation

Content > Pending Approvals > Pending Approvals Summary page

Steps

1. From the Pending Approvals page, select the content item to preview.
2. In the Preview column, click the **Preview** icon.

   The content item is displayed in its default stylesheet.

7.6 Viewing Content Item Details

Use the following procedure to view the details of the content item.

Prerequisites

None

Responsibility

Content Item Approver

OCM Super User

Navigation

Content > Pending Approvals > Pending Approvals Summary page

Steps

1. From the Pending Approvals tab, select the content item to view its details.
2. In the **Content Item** column, click the hyperlinked content item name.

   The Content Item Details: <*content item name*> page appears displaying the details of the item.
3. Optionally, click **Preview** to view the item details as it will appear when it is published and goes live.

   The translated content item is displayed in its default stylesheet. For information on previewing a content item, see Previewing a Content Item.
4. Optionally, to approve the selected content item, click **Approve**.

   For information on approving a content item, see Approving a Content Item.
5. Optionally, to update the selected content item, click **Update**.

   For information on updating a content item, see Updating a Content Item.
6. Optionally, to reject the selected content item, click **Reject**.

   For information on rejecting a content item, see Rejecting a Content Item.

8 Managing Translations

This chapter discusses tasks that you can perform from the Translations tab. Sections in this chapter include:

8.1 Overview

The Translations tab in Oracle Content Manager (OCM) provides an area for translators to:

- perform translations for content items
- view and update completed translations

The content items that are approved and must be translated are listed in the Translations tab. Translators get notified of pending translations via e-mail. They use this tab to view the list of content items that require translation.

To be able to translate and view translations, it is recommended that you use the UTF8 character set on all three tiers: database server, middle tier application server, and browser client. Ensure that the character set encoding of the session language is a superset of the base language and the translated language. For instance, the

Western European encoding will allow translations between any of the Western European languages such as English and French but may not work for translations into other languages such as Japanese.

For more information on setting up your environment for translation, see the *Oracle Application System Administrator's Guide*.

Note: The content items and tabs that are displayed, and the actions that you can perform in OCM are solely dependent upon the data and functional security access that you have. For more information, see Chapter 4, "Managing Folder Permissions and Data Security".

Table 8–1 describes the components of the Translations tab, and the tasks that you can perform as a translator.

Table 8–1 Translations Tab Fields

Name	Description	Reference
Simple Search	You can search for content items by specifying the content type and content item name.	For more information, see Using Simple Search.
Advanced Search	Click **Advanced Search** to search for content items based on several parameters such as Translated Language and Last Update. The search can also span multiple versions of a content item.	For more information, see Using Advanced Search.
Translate	Select a content item, and click **Translate.**	For more information, see Translating and Updating a Translated Content Item.
Hyperlinked Content Item	You can view a read-only version of the content item in its base language.	For more information, see Viewing Content Item Details.
History	Click the **History** icon to view the translation history of the selected content item.	For more information, see Viewing Translation History.

Table 8–1 Translations Tab Fields

Name	Description	Reference
Quick Translation	Click the **Quick Translation** icon to upload translated binary file attachments for content items that have a `File Attachment` attribute.	For more information, see Uploading Quick Translations for a Content Item.

8.2 Notifications

Translators receive a notification when a content item requiring translation is approved. OCM uses Oracle Workflow to send notifications to translators. Oracle Workflow must be configured and the Workflow Mailer must be set up for the notifications to be sent as e-mails. Users can also log in to the Self-Service Applications to view workflow notifications. For more information on configuring Oracle Workflow, please see the *Oracle Workflow Administrator's Guide*.

8.3 Translating and Updating a Translated Content Item

Use the following procedure to translate and update a translated content item successfully.

Prerequisites

None

Responsibility

OCM Super User

Translator

Navigation

Content > Translations > Translations page

Steps

1. From the Translations tab's Results: Pending Translations region, select the content item to translate.
2. Click **Translate**.

   The Translate:<*content item name*> page appears.

3. Use the **Translate to** drop-down list to select the language to which the content item must be translated.

   Note: Languages that have been installed (apart from the source language) as part of Oracle Applications appear in the drop-down list.

4. Click **Go**.

5. In the Content Type:<*content item type*> region, make changes to the contents in the language that you selected.

   Note: The read-only fields display information in the base language.

6. Click **Submit**.

   The Confirmation page appears.

7. Optionally, click **Preview** to view the content item as it will appear when it is published and goes live.

   To preview the content item in the translated language, see Viewing Content Item Details.

8. Optionally, from the Added Items region, click the **Preview** icon to preview any attachments with the content item.

   Note: Attachments must be translated separately.

8.4 Viewing Content Item Details

You can view the details of the content item. The details are displayed in the base language. The base language is the language that the content item was originally created in. Use the following procedure to view the details of a content item including its translations.

Prerequisites

None

Responsibility

OCM Super User

Translator

Navigation

Content > Translations > Translations page

Steps

1. From the Translations tab's Results: <*content item name*> region, select the content item to view its details.
2. In the Content Item column, click the hyperlinked content item name.

   The Content Item Details: <*content item name*> page appears displaying the details of the item in its base language.
3. Optionally, click **Preview** to view the content item details as it will appear when the content item is published and goes live.

   A pop-up windows appears, and the content item is displayed in its default stylesheet.
4. Optionally, to view the item's translations, click **View Translations**.

   The <*content item name*>:Translations page appears.

   To preview the translation, click **Preview**. A pop-up windows appears, and the content item is displayed in the translated language.

8.5 Viewing Translation History

A content item may be translated to several languages. Use the following procedure to view the details of the translations for a content item.

Prerequisites

None

Responsibility

OCM Super User

Translator

Navigation

Content > Translations > Translations page

Steps

1. From the Translations tab's Results: <*content item name*> region, select the content item to view its translation history.
2. In the History column, click the **History** icon.

The <*content item name*>:Translation History page appears. The translated language, date and time of translation, and the translator is displayed for each language that the item has been translated to.

3. Click **Back** to return to the previous page.

8.6 Uploading Quick Translations for a Content Item

When a content item has to be translated to several international languages, the translation assignment can be outsourced to an external agency. The external agency may complete the translations, and send back all the translations together. You can upload all translations for a single content item from the Quick Translation page.

Note: You can quick translate only for content items that have file attachments.

If a content item has multiple attributes along with a file attachment, the file attachment can be quick translated. To translate the other attributes, the normal process must be followed.

Quick Translations help you to quickly upload several translations from a single page. It saves you the cumbersome task of submitting several translations, one at a time. Use the following procedure to upload quick translations.

Note: In quick translation, content item details such as content name and content description are not translated. These will appear in the base language when the item is viewed in the Web site. In order to translate these details as well, you must follow the normal translation process. For more information, see Section 8.3, "Translating and Updating a Translated Content Item".

Prerequisites

None

Responsibility

OCM Super User

Translator

Navigation

Content > Translations > Translations page

Steps

1. From the Translations tab's Results: <*content item name*> region, select the content item whose translations you want to upload.
2. In the Quick Translation column, click the **Quick Translation** icon.

   The Quick Translation: <*content item name*> page appears. The details of the content item in the base language are displayed. Existing translations, if any, are listed in the Content Item Attachments region.
3. To upload a new translation, click the **Search** icon from the Upload Translated File column in the appropriate language row.

   The Attachment Selector pop-up window appears.

   a. Click **Browse** to locate the translated attachment from your local hard disk or from the network.

      A pop-up window appears from where you can locate the file to upload.

   b. Select the file to upload, and click **OK**.

      The name of the selected file is displayed in the Attachment Selector window.

   c. Click **Submit**.

      The name of the selected file appears in the Upload New File column.
4. Click **Submit**.

   The Confirmation page appears.
5. Optionally, click the **Download** icon to download a file that was previously uploaded.
6. Optionally, click the **Delete** icon to delete a file that was uploaded.

8.7 Finding a Content Item

- Section 8.7.1, "Using Simple Search"
- Section 8.7.2, "Using Advanced Search"

8.7.1 Using Simple Search

You can locate a content item by performing a simple search based on the content type and content item name. Use the following procedure to locate a content item successfully.

Prerequisites

None

Responsibility

OCM Super User

Translator

Navigation

Content > Translations > Translations page

Steps

1. From the Translations tab's Simple Search region, use the **Search** drop-down list to select a content type.
2. Enter the name of the content item name.
3. Click **Go**.

   The search results are displayed in the Results region of the Translations page.

8.7.2 Using Advanced Search

You can use the Advanced Search utility to locate a content item by providing specific details that narrow down your search. Use the following procedure to search for a content item using advanced search.

Note: Search results display content items only from folders where you have permissions. For more information, see Chapter 4, "Managing Folder Permissions and Data Security".

Prerequisites

None

Responsibility

OCM Super User

Translator

Navigation

Content > Translations > Translations page

Steps

1. From the Translations tab's Simple Search region, click **Advanced Search**.

   The Translations Advanced Search page appears.

2. Provide details of the content item that you are searching for in the respective fields.

3. Click **Search**.

   The search results appear in the Results region at the bottom of the page.

References

Table 8–2 describes the fields in the Advanced Search page.

Table 8–2 Advanced Search Fields

Name	Description
Content Item Name	Name of the content item. Use the drop-down list to select the condition, and enter the name or any part of the name of the content item.
Content Item Description	Description about the content item. Use the drop-down list to select the condition, and enter the description.
Content Type	Type of the content item. Use the drop-down list to select the type.
Source File Name	Name of the file attachment that you may have uploaded along with the content item. Use the drop-down list to select the condition, and enter the name of the source file.
Creator	Name of the user who created the content item. Click the **Search** icon to select the user.

Table 8–2 Advanced Search Fields

Name	Description
Owner	Name of the owner. The owner may be different from the creator in some cases. For example, the creator's manager may be the owner. Click the **Search** icon to select the user.
Base Language	The language that the content item was originally created in. Use the drop-down list to select the base language.
Translated Language	The language that the content item was translated to. Use the drop-down list to select the translated language. If the item has been translated to several languages, select the language that you want to view the content item in.
Last Updated Date	Date on which the content item was last modified. Use the drop-down list to select the condition, and enter the date. Optionally, click the **Calendar** icon to select the date.

9 Managing Trash

This chapter discusses tasks that you can perform from the Trash tab. Sections in this chapter include:

- Section 9.1, "Overview"
- Section 9.2, "Restoring a Content Item"
- Section 9.3, "Deleting a Content Item"
- Section 9.4, "Using Simple Search"

9.1 Overview

The Trash tab in Oracle Content Manager (OCM) allows users with special permissions to restore removed content items, or delete them permanently.

Note: The content items and tabs that are displayed, and the actions that you can perform in OCM are solely dependent upon the data and functional security access that you have. For more information, see Chapter 4, "Managing Folder Permissions and Data Security".

Table 9–1 describes the components of the Trash tab, and the tasks that you can perform from here.

Table 9–1 Trash Tab Fields

Name	Description	Reference
Simple Search	You can search for content items by specifying the content item type and content item name.	For more information, see Using Simple Search.
Delete	Click **Delete** to delete a content item permanently.	For more information, see Deleting a Content Item.
Restore	Click **Restore** to restore a content item from the Trash tab to the folder from where it was removed.	For more information, see Restoring a Content Item.

9.2 Restoring a Content Item

When a content item is restored, it is no longer visible in the Trash tab. It is moved back to the folder from where it was removed. The content item is restored back in the same status that it was in, before being removed.

You can restore content items based on the permissions that you have on folders. For example, John has Approve permission on folder Apps. John will be able to approve content items that belong to the Apps folder, but cannot restore them.

Use the following procedure to restore a content item successfully.

Prerequisites

None

Responsibility

OCM Super User

Content Item Creator

Content Item Approver

Navigation

Content > Trash > Deleted Content page

Steps

1. From the Trash tab's Results region, select the content item you want to restore.

   You can select multiple content items to restore.

2. Click **Restore**.

   The content item is restored, and is not visible in the Trash tab.

9.3 Deleting a Content Item

A removed content item can be deleted permanently. You can delete content items based on the permissions that you have on folders. For example, John has Approve permission on folder Apps. John will be able to approve content items that belong to the Apps folder, but cannot delete them.

Use the following procedure to delete a content item.

Prerequisites

OCM Super User

Content Item Creator

Content Item Approver

Responsibility

OCM Super User

Navigation

Content > Trash> Deleted Content page

Steps

1. From the Trash tab's Results region, select the content item to delete.

   You can select multiple content items to delete.

2. Click **Delete**.

   A message appears asking you to confirm the deletion.

3. Click **OK**.

   The content item is deleted permanently.

9.4 Using Simple Search

You can locate a deleted content item by performing a simple search based on the content type and content item name. Use the following procedure to locate a content item successfully.

Prerequisites

None

Responsibility

OCM Super User

Content Item Creator

Content Item Approver

Translator

Navigation

Content > Trash> Deleted Content page

Steps

1. From the Trash tab's Deleted Content region, use the View drop-down list to select a content type.
2. Enter the name of the content item.
3. Click **Go**.

   The search results are displayed in the Results region of the Deleted Content page.

Part III

Appendix

This part contains the following appendix:

- Appendix A, "Oracle Content Manager Frequently Asked Questions"

A Oracle Content Manager Frequently Asked Questions

This chapter attempts to answer some of the frequent questions that you might have. The questions are organized according to the tabs in the application. Use the following links to access the relevant section.

- Section A.1, "My Content"
- Section A.2, "Pending Approvals"
- Section A.3, "Library"
- Section A.4, "Translations"
- Section A.5, "Trash"
- Section A.6, "Administration"

A.1 My Content

What is a Content Item?

A content item can be anything from a text field to an image, audio, or a video file. For instance, a product manager could describe a product's functionality in a text field, and a marketing personnel may create an attractive video file to market a product.

While creating a content item, I am unable to see some content types in the drop-down list. Why?

Only active content types are exposed under the My Content tab. The list you see does not include the inactive content types.

How do I make changes to an existing content item?

Depending on the version status, you can either update an existing version or create a new version of the item. For more information, see Section 5.3, "Updating a Content Item" or Section 5.4, "Updating Earlier Versions of a Content Item" or Section 5.7, "Making a New Version of a Content Item".

Why is the data displayed in the My Content tab different between two users in my organization?

The content items that are displayed in the My Content tab is based on a user's folder security permissions. Therefore, it is possible that two users with different permissions do not have access to the same data.

A.2 Pending Approvals

I am not receiving any e-mail notifications. What should I do?

Make sure the workflow has been configured properly. Please contact your system administrator for setting up Oracle Workflow.

What happens if I reject a content item?

A content item that is rejected is returned to the content creator with the status as `Rework`. The content creator can make the necessary modifications, and submit it for approval.

A.3 Library

Why am I not able to view all the versions of a content item in the Library tab?

The content library displays only the live version of the content item.

A.4 Translations

A content item that I created does not appear in the Translations tab. Why?

Only content items that require translation are displayed in the Translations tab. To indicate that a content item must be translated, select the Translation Required check box while creating the content item.

Why do I see multiple versions of an item in the Translations tab?

When you indicate that a content item requires translation, all approved versions of the item are submitted for translation.

I have selected the Translation Required check box while creating the content item. Why does the content item not show up under the Translations tab?

Please check the status of the item version. Only approved content item versions are submitted for translation.

How will the translators be notified regarding translations?

As soon as a content item version is approved, a check is made to see if it requires translation. If the content item requires translation, a notification is sent to the translators who have access to the folder where the content item is stored.

A.5 Trash

I have selected multiple content items to restore or delete. However, all of them do not get restored or deleted. Why?

The `Delete` and `Restore` actions on content item are based on the folder permissions. You will not be able to delete items from folders on which you do not have the Delete permission. Likewise, to restore items, you must have the Restore permission on the folder where the item is located.

A.6 Administration

Why am I not able to update an existing content type?

You cannot update content types if there are content items using those types.

What should I do if I do not want to set permissions for every user in my organization?

You can set default global permissions that will be applicable to all users of the application. In addition, you can also set up individual user/group level permissions.

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