

Oracle® Content Manager

User Guide

Release 11*i*

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Oracle Content Manager User Guide, Release 11i

Part No. B13536-01

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Preface

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

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 Applications training classes available through Oracle University.

- Oracle Self-Service Web Applications.

To learn more about Oracle Self-Service Web Applications, read the *Oracle Self-Service Web Applications Implementation Manual*.

- 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

The Oracle Content Manager User Guide contains the information you need to understand and use Oracle Content Manager. This guide contains the following chapters:

- [Chapter 1](#) discusses the key features of Oracle Content Manager and provides a brief introduction to the new features of Oracle Content Manager.

- [Chapter 2](#) describes the need to have folders, importance of access control, and how to create and manage folders.
- [Chapter 3](#) describes the process to create and manage content items.
- [Chapter 4](#) discusses the process to approve or reject content items.
- [Chapter 5](#) discusses all the tasks related to content item translations.
- [Chapter 6](#) explains how to publish and view content in the categories.

Documentation Accessibility

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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 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).

- **PDF Documentation**- See the Documentation CD provided with each release for current PDF documentation for your product. This Documentation CD is also available on *OracleMetaLink* and is updated frequently.
- **Online Help** - You can refer to Oracle iHelp for current HTML online help for your product. Oracle provides patchable online help, which you can apply to your system for updated implementation and end user documentation. No system downtime is required to apply online help.
- **11i Release Content Document** - Refer to the Release Content Document for new features listed release. The Release Content Document is available on *OracleMetaLink*.
- **About document** - Refer to the About document for patches that you have installed to learn about new documentation or documentation patches that you can download. The new About document is available on *OracleMetaLink*.

Related Guides

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

You can read the guides 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>.

Guides 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). 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.

Guides Related to This Product

Oracle *interMedia* User's Guide and Reference

This user guide and reference provides information about Oracle *interMedia*. This product enables Oracle9i to store, manage, and retrieve geographic location information, images, audio, video, or other heterogeneous media data in an integrated fashion with other enterprise information. Oracle Trading Community Architecture Data Quality Management uses *interMedia* indexes to facilitate search and matching.

Oracle Self-Service Web Applications Implementation Guide

This manual contains detailed information about the overview and architecture and setup of Oracle Self-Service Web Applications. It also contains an overview of and procedures for using the Web Applications Dictionary.

Installation and System Administration

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.

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 and the Oracle 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 guides and implementation guides.

Oracle Applications Implementation Wizard User Guide

If you are implementing more than one Oracle product, you can use the Oracle Applications Implementation Wizard to coordinate your setup activities. This guide describes how to use the wizard.

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.

“About” Document

For information about implementation and user documentation, instructions for applying patches, new and changed setup steps, and descriptions of software updates, refer to the “About” document for your product. “About” documents are available on Oracle *MetaLink* for most products starting with Release 11.5.8.

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 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, and manage concurrent processing.

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 and describes the Oracle Application Object Library components that are needed to implement the Oracle Applications user interface described in the *Oracle Applications User Interface Standards for Forms-Based Products*. This manual also provides information to help you build your custom Oracle Forms Developer forms so that the forms 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

Oracle Applications Product Update Notes

Use this guide as a reference for upgrading an installation of Oracle Applications. It provides a history of the changes to individual Oracle Applications products between Release 11.0 and Release 11*i*. It includes new features, enhancements, and changes made to database objects, profile options, and seed data for this interval.

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 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 guide 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 Oracle*Metalink*

Oracle Applications Message Manual

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

Training and Support

Training

Oracle offers a complete set of training courses to help you and your staff master Oracle Content Manager and reach full productivity quickly. These courses are organized into functional learning paths, so you take only those courses appropriate to your job or area of responsibility.

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 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 Oracle server, and your hardware and software environment.

OracleMetaLink

OracleMetaLink 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 OracleMetaLink, 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 OracleMetaLink 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 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.

Introduction to Oracle Content Manager

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

- [Section 1.1, "Oracle Content Manager Overview"](#)
- [Section 1.2, "The Content Lifecycle"](#)
- [Section 1.3, "What's New in this Release"](#)

1.1 Oracle Content Manager Overview

Oracle Content Manager (OCM) is a key component of the Sales, Marketing and E-Commerce applications. It enables content to be stored and managed in a central repository, thereby forming a single source of truth for accurate and consistent content.

In OCM, a content is a structured data that is managed through a lifecycle that includes creating, approving, translating, and publishing. A content can be a text file, an image, an audio, or a video file. For example, a product manager could describe the product's functionality in a text field. To market the product, a marketing person can create an attractive video file using the same product description. To ensure that they both access the same content, it must be available in a central repository.

OCM integrates with Oracle E-Business Suite and enables seamless transition of content to and from Oracle E-Business Suite applications. Integration also facilitates single user sign-on to associate content (product images, white papers, and newsletters) with any E-Business Objects (store sections, inventory products, and marketing campaigns).

1.1.1 Oracle Content Manager Features

The key features of OCM include:

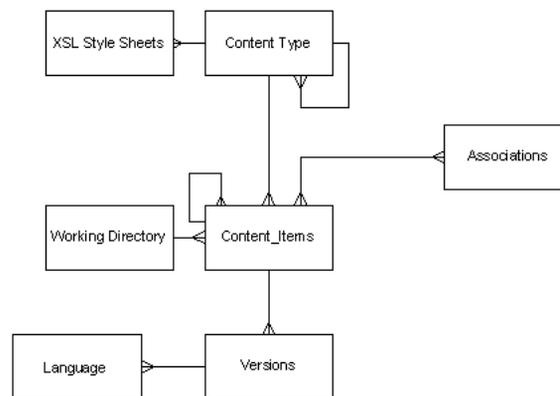
- Store data in the central repository
- Create content based on templates
- Control multiple versions of the same content
- Approve content based on the workflow notifications
- Maintain translated versions of the content item
- Maintain renditions of the same content in different formats
- Support content reuse
- Support flexible presentation of content through many channels such as print, e-mail, and fax
- Control the access of the folders, to permit only users with appropriate permission to access them the data
- Preview the content before publishing using stylesheets
- Create many content items at once by uploading a zip file

- Helps to keep the content separated from its presentation by using content types to maintain the structure of the content and stylesheets to present the same content in different formats

1.1.2 Relationship Between OCM Objects

Figure 1–1 illustrates the relationship between different objects in OCM.

Figure 1–1 Relationship Between OCM Objects



- Each content item has one and only one content type. However, within each content type, there may be nested content types. Such nested content types are called as compound content types.
- Content items may have many associations, that is, they can be linked to other CRM objects such as marketing campaigns and schedules, or inventory items.
- Content items can be published in multiple categories in the library, but may reside in only one folder.
- Each content item can have many versions and each version can have many languages associated with it.
- There can be many stylesheets associated with one content type.

1.1.3 Oracle Content Manager Integrations

As a core component of the Oracle Sales, Marketing, and E-commerce applications, the strength of OCM lies in its integration with the different E-Business applications. These integrations ensure a smooth flow of content across the enterprise.

The following Oracle applications integrate with Oracle Content Manager:

- Oracle iStore
- Oracle Partner Management
- Oracle One-to-One Fulfillment
- Oracle Marketing
- Advanced Services Online
- Oracle Proposals

Oracle iStore

Oracle iStore is an E-commerce application that enables companies to build and manage global Internet storefronts, which can be personalized.

Integrating with OCM, the Oracle iStore merchants can access all the features of OCM and also:

- Manage content in global stores by keeping the content separate between content owners and store administrators.
- Preview content from the context of the store.
- Ensure brand consistency across all sites.

Oracle Partner Management

Oracle Partner Management is a Marketing and Partnering application enabling partner business processes and applications that support partner collaboration.

When vendors create a program, they create a summary listing the details of the program. The summary is an HTML based content, which helps the partners to understand the program requirements, benefits, and so on. The content that is used to create the program is stored and retrieved from OCM.

Oracle One-to-One Fulfillment

The Oracle One-to-One Fulfillment is a product interaction center that enables Oracle E-Business Suite applications to use a central mechanism for distributing collateral to customers. One-to-One Fulfillment provides the capability to fulfill content across multiple channels, such as e-mail, fax, and print.

Integrating with OCM, Oracle One-to-One Fulfillment enables the following features for its fulfillment users to:

- Support the templates stored in OCM
- Setup different templates for E-mail, fax, and print type requests
- Create and upload the content into OCM.

Oracle Marketing

Oracle Marketing enables today's marketers to market more effectively. It provides automation and tools for the entire marketing process - from the initial analysis to decide what kind of marketing is required and whom to target, to the actual campaign planning, budget management, list creation and content management, to automated multi-channel execution, and monitoring.

Integrating with OCM, Oracle Marketing empowers the marketer to fully leverage all the features of OCM, thereby bringing in brand consistency, reduction in costs, and better management of marketing assets. In addition, users can:

- Access content across all channels of execution - e-mail, fax, print, and Web.
- Fulfill content from multi-channels.
- Keep track of the content that is used for different campaigns.
- Collaborate content to be shared across the Sales and Marketing users of the enterprise.
- Associate content to Products and use it for recommending content in campaigns.

Oracle Proposals

Oracle Proposals is a Sales application that enables sales representatives to dynamically generate proposals from templates that contain proposal elements such as cover letters, product descriptions, pricing, and terms and conditions.

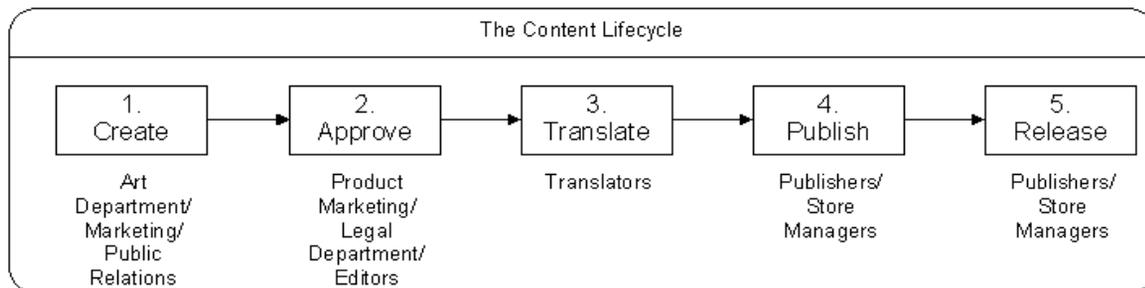
Integrating with OCM, Oracle Proposals enables the following features to its users and administrators:

- Organize content in folder hierarchies.
- Store, approve, and version the content.
- Search and select content from OCM repository, which is created by sales representatives, marketers, and other users.
- Maintain content translations.

1.2 The Content Lifecycle

Figure 1-2 describes different phases of a content lifecycle.

Figure 1-2 The Content Lifecycle



1. Create - In this stage, the content creators define and create the content based on the templates. They can also update or create different versions of the content before submitting it for approval. They can view different versions of the content items.
2. Approve - In this stage, the approver previews and checks the content for accuracy. The approver can either approve or reject the content.
3. Translate - In this stage, if the content is marked for translation, the translator translates the approved content.
4. Publish - In this stage, the publisher associates the content with store (inventory) objects, and publishes the content to any device.
5. Release - In this stage, the content is released and tracked for usage.

1.3 What's New in this Release

This user guide describes the OCM functionality in the Oracle E-Business Suite 11.5.10 release. If you are implementing this product prior to the release, using product minipacks or family packs, some new functionality may be dependent on integration with other Oracle products. Please consult *OracleMetaLink* for relevant product patches and documentation.

The following new features and enhancements have been added to OCM in this release:

- [Robust Folder Access and Data Security Enhancements](#)
- [Translation Approvals](#)
- [Bulk Import of Files](#)
- [Accessing Multiple Version of Compound Subitemss](#)
- [Grouping of Content Types](#)
- [Custom Attribute LOVs](#)
- [Content Library](#)
- [Explicit Locking of Items](#)
- [Intermedia Text Based Search](#)
- [Flexible URL Encryption](#)
- [Rendition](#)
- [Category](#)

Robust Folder Access and Data Security Enhancements

Content creators must organize large amounts of content to easily retrieve and restrict others from accessing it. OCM supports this feature by allowing content creators to store the content in folders, which are secured by access control. You can access and view the contents in a folder only if you have the necessary permissions. The access control can be modified anytime.

Translation Approvals

In the previous release, you could create content items in the base language and approve them; translations did not go through an approval process and only content items had to be approved. In this release, along with content items, the translations must also be approved.

Bulk Import of Files

OCM supports the ability to import files and images into the repository. File extensions can be mapped to content types in order to upload files into the appropriate content type.

Accessing Multiple Version of Compound Subitems

In the previous release, you could only access the live version of the subitem, while creating a compound item. Now, you can define a compound item to point to a specific version of the approved subitem.

Grouping of Content Types

As more users use OCM, it becomes difficult to manage many content types. OCM supports the ability to group the content types into content type groups. By creating groups, you can restrict the users (while creating a content item) to select a content type only from the subscribed group.

Custom Attribute LOVs

While defining content type attributes, you can define custom LOVs. For example, you can now create custom LOVs for country, salutation, and so on.

Content Library

In the previous release, you would browse the content library based on content types. Now, you can create categories for the published content items and search for content items based on the category.

Explicit Locking of Items

This is a new feature that enables you to lock the content items in order to prevent other users from updating them.

Intermedia Text Based Search

In the previous release, you could only do simple searches based on the name and description of the content items. In this release, you are provided an intermedia search. This is a text based search that allows you to search content items based on the content item attributes. For example, you can search for all white papers containing the text 'technical', where technical is an attribute.

Flexible URL Encryption

It is important for content items with a URL posted on the web to be encrypted. In the previous release, all the content items were either encrypted or none were encrypted. In this release, the administrator can decide at the content type level, if all content items of the content type are to be encrypted or not.

Rendition

Rendition is a mechanism by which you can upload the same content in different formats such as pdf, doc, and rtf. In the previous release, you could do this only through the APIs. In this release, you can upload renditions for a content item through the user interface.

Category

A category is used to logically group a set of content items together. While folders are work areas to organize content items, categories reflect more of a business group. Many organizations define content that can be classified into one or more categories. Categories also have a hierarchy of subcategories for finer classification. You can browse the library based on the categories.

Working with Folders

This chapter describes the need to have folders, importance of access control, and how to create and manage folders. Sections in this chapter include:

- [Section 2.1, "Understanding Folders"](#)
- [Section 2.2, "About Folder Access Controls"](#)
- [Section 2.3, "Creating and Managing Folders"](#)

2.1 Understanding Folders

A folder is a working area or directory that can have subfolders and content items. Oracle Content Manager (OCM) enables content creators to organize the content in folders and subfolders.

Folders are associated with a set of meta-data and permissions. For details on different permissions, see [Table 2-2](#).

2.1.1 Folder Terms and Definitions

The following terms and definitions are frequently used in this guide:

Folder Management

You can navigate through the folder hierarchy and do various operations based on the permissions you have. Only authorized users can create folders.

Root Folder

The Root folder is the highest level in the folder hierarchy. In the navigation path, it is represented as "/". The Root folder is seeded and any seeded folder cannot be deleted or renamed. You can create folders under the Root folder depending on the permissions that you have. See [Figure 2-1](#) for a sample folder hierarchy.

Home Folder

The Home Folder is the folder that appears when you navigate to the My Content tab. By setting a Home Folder, you can directly navigate to a folder that you use extensively. You can set any folder that you have access to as your Home Folder and choose to change it anytime.

To set a home folder, navigate to the folder and click Set as Home Folder button. If you have not set a Home folder, by default, the ROOT/COMMON folder is set as your Home folder.

Current Folder

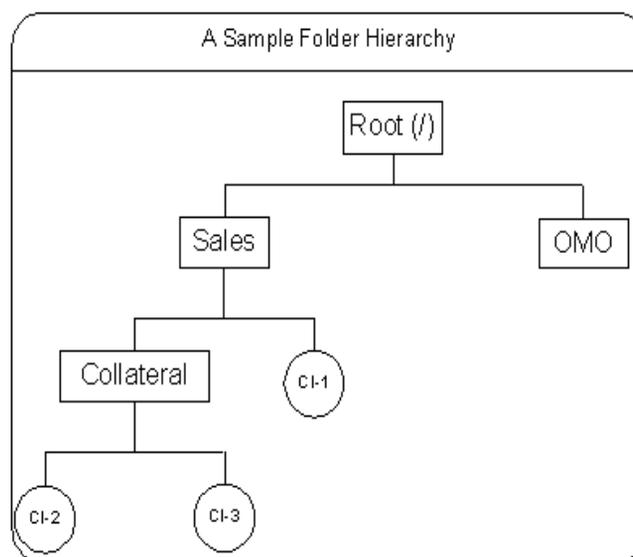
The current folder displays the details of the present folder and the folders you have navigated to reach the present folder.

The folders in the navigation paths (Current Folder and Home Folder) are hyperlinked. To navigate to any folder listed in the navigation path, click the hyperlinked folder.

2.1.2 Browsing Folders

When you navigate to the My Content tab, the page displays the Home folder details such as its subfolders and the summary of the content items in the folder. Depending on the access control you have on a folder, the content items are displayed. For example, if you do not have read permission on the folder, you will not be able to view any items in the tabular region. If you have permission to access any of its subfolders, then you can traverse the folder hierarchy, but cannot view any content items within these folders.

Figure 2–1 Folder Hierarchy



2.1.3 Folder Properties

You can view the folder properties such as access control details, history, and content distributions, by clicking the Folder Properties button. If you have Manage Folder permission, you can modify the access control of the folder.

The View Content Distribution link displays the content distribution table. This table lists the number of times each content type is used to create content items, in that folder. Also, a chart is displayed showing the distribution of content items versus content types.

2.2 About Folder Access Controls

For a folder hierarchy, it is necessary to have robust data security to provide fine grain access control to different users at different folder levels. Folder access control involves assigning a User or a Group the permissions to access the folder. Access control is a combination of permissions and exclusions. Typically, system administrators create folders and assign access control to users.

Permissions

Permissions for a folder are granted at Users, Group, Responsibility, or Global levels.

[Table 2-1](#) lists the permissions that you can grant to or revoke from users.

Table 2-1 Permissions List

Permission	Description
Manage Folder	Allows you to update the folder properties including the access control.
Create Sub-Folder	Allows you to create subfolders under the given folder.
Manage Item	Allows you to create, update, restore, remove, and delete content items in the given folder.
Approve Item	Allows you to approve content items.
Translate Item	Allows you to translate content items.
Approve Translation	Allows you to approve translations.
Read Item	Allows you to read (view) the content items in the given folder.

Exclusions

A folder can maintain an exclusion list to exclude certain users or groups by revoking their permissions.

2.2.1 Inheriting or Overriding Parent Access Control

The permissions of a folder play a role of a template while creating subfolders. The permissions that are granted for a parent folder can be inherited by its subfolder. However, these permissions can be changed anytime.

You can create and manage a folder if you have Create Sub-Folder and Manage Folder permissions. In the Folder Properties page, the Access Control region

displays the access control (Permissions and Exclusions) for a folder. While creating a folder, if you select the option to:

- Inherit parent access control, then the Permissions and Exclusions regions are disabled. This is the default selection.

The subfolder inherits all the permissions from the parent folder. If you modify the parent folder access control, the subfolders also reflect the changes.

- Override parent access control, then the Permissions and Exclusions regions are enabled.

You can assign permissions and exclusions for the subfolder. If you modify the parent folder access control, the subfolders do not reflect the changes.

For more information on content items, see [Chapter 3, "Managing Content"](#).

2.2.2 Guidelines for Assigning Permissions to Users

In an organization, for users to successfully manage their assigned roles, it is recommended to assign the permissions, explicitly along with the assigned role. For OCM to work smoothly, the corresponding recommended permissions must be granted. See [Table 2-2](#) for details.

Table 2-2 Recommended Permissions for the Roles in the Organization

Permission/Role	Other Recommended Permissions
Manage Folder	Manage Folder, Create Sub-Folder, Manage Item, and Read Item
Create Sub-Folder	Create Sub-Folder
Manage Item	Manage Item and Read Item
Approve Item	Approve Item, Manage Item, and Read Item
Translate Item	Translate Item and Read Item
Approve Translation	Approve Translation, Translate Item, and Read Item
Read Item	Read Item

2.2.3 Copying Folders

You can copy a folder from one location to the other. To copy a folder, you must have Read Item permission on the source folder, and Manage Folder and Manage Items permissions, on the destination folder. While copying the folder, you can rename it. Only the latest versions of the content items in the folder are copied.

2.2.4 Removing Folders

To remove a folder, you must have Manage Folder permission. The folder must not contain any subfolders, that is, you must delete all the subfolders before you delete the parent folder. You cannot delete a folder, if the content items in the folder are:

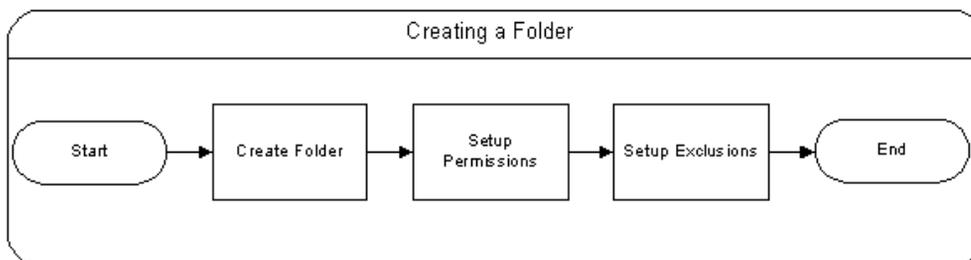
- Locked by another user
- Associated with a Business Object
- Used as a subitem in a compound content item
- Published to a category
- Submitted for approval
- Used as a default stylesheet for a content type

Note: You cannot delete a folder that is set as Home folder. Before deleting a home folder, you must set another folder to be your home folder.

2.3 Creating and Managing Folders

Figure 2–2 depicts the process to create a folder and set up the necessary access controls.

Figure 2–2 *Create Folder Flow*



If you have Create Folder and Manage Folder permissions, you can create and manage folders.

Note: The seeded folders and the Root folder cannot be updated.

Use this procedure to create and manage folders.

Prerequisites

You must have the appropriate permissions. See [Table 2-2](#) for details.

Steps

1. Login with Create Folder permission and navigate to the folder where you would like to create a new folder.
2. Click **Create Folder**.
3. Enter folder name and description.
4. In the Access Control region, select the appropriate button to either inherit or override parent access control.
 - To inherit parent access control, select the Inherit radio button. The fields in the Permissions and Exclusions regions are disabled.
 - To customize the access control, select the Override radio button. The fields in the Permissions and Exclusions region are enabled.

To add Users, Group, Responsibility, and Global to the permission list, click **Add Another Row**. Select a type from Type LOV and select the required permissions and exclusions.
5. Click **Apply**.

The folder is created.
6. Optionally, to update a folder:
 - a. Select a folder by highlighting the Select button in the Content Summary - Browse Folders page.
 - b. Click **Folder Properties**.
 - c. Change the required properties and click **Apply**.

Seeded folders properties cannot be updated.
7. Optionally, to copy a folder:
 - a. Select a folder in the Content Summary - Browse Folders page.

Managing Content

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

- [Section 3.1, "Content Overview"](#)
- [Section 3.2, "Understanding Content Item Creation Process"](#)
- [Section 3.3, "Creating and Managing Content Items"](#)
- [Section 3.4, "Managing Content Item Versions"](#)
- [Section 3.5, "Exploring Content Item Details Page"](#)
- [Section 3.6, "Browsing Content Items"](#)
- [Section 3.7, "Understanding Bulk Upload"](#)
- [Section 3.8, "Creating Bulk Uploads"](#)
- [Section 3.9, "Trash Overview"](#)
- [Section 3.10, "Deleting or Restoring Folders and Content Items"](#)

3.1 Content Overview

A content is a structured data. The lifecycle of content includes creating, approving, translating, and publishing. A content item can be anything from a text field to an image, audio, or a video file. For example, a product manager can describe product functionality in a text field, and marketing personnel may create an attractive video file to market the product.

The content can range from simple content items such as image items to more complex compound items comprising of multiple subitems.

The content items are stored in folders. For more information on folders, see [Chapter 2, "Working with Folders"](#).

3.2 Understanding Content Item Creation Process

To create a content item you must:

1. Select a content type
2. Provide content details

3.2.1 Selecting a Content Type

The content types define the structure of a content item through a set of attributes. They are the main tenet of Oracle Content Manager (OCM). Administrators create these content types to ensure that content items are consistent, wherever the same content types are used.

A content type may consist of simple attributes, subitems, and compound content types.

Simple Attributes

Attributes can be of type Extended, Pull-down, and Attachments. For example, an Image Type can have attributes such as Image Attachment, Image Height, Width, and Alt Text.

- The extended attributes are data types such as Boolean, Date, Number, HTML, Text, and URL. While creating a content item of attribute type:
 - Boolean is displayed as a check box.
 - Date appears as a date picker.
 - Number accepts a number.

- HTML is displayed as rich text html editor.
- Text accepts characters.
- Attribute URL accepts a URL.
- The Pull-down attributes appear as drop-down LOVs.
- The Attachment attributes enable you to upload attachments for the content item.

Subitems

Subitems are individual content items based on their corresponding content types. For example, a Sales Kit can consist of White paper, Data sheet, Product Positioning as the sub-items.

Compound Content Types

A content type can have other content types as its components. Such content types are called compound content types. For example, a Product Brochure content type can have other content types such as Product Presentation, Product White paper, and Product Demo as its components. This makes Product Brochure a compound content type.

3.2.2 Providing Content Details

The content type, which you select, determines the content details that you must provide. While creating a content item, you may have to enter the details in the following regions:

- Attributes
- Renditions
- Association
- Meta Information
- Categories

3.2.2.1 Attributes

In this region, you can enter the attribute details. Depending on the attributes defined for the content type, the fields are displayed.

Adding Subitems From Library

If a compound content type is selected, while creating compound items, you can add content items from the Library. You can choose to refer to the live version or a specific version of the sub-item.

To add more items, you can click the Add button. This action adds a row depending on the minimum and maximum value that is set while creating the content type.

If you select the Use Live check box, the LOV lists only the live version of the item. If the live version of the sub-item is updated, the changes are reflected in the compound item also.

If the Use Live check box is not selected, the LOV lists all the approved versions. Once you select a particular version of the subitem, every time, the same version of the subitem is selected for the compound item.

Figure 3–1 Accessing Multiple Versions of a Compound Subitems

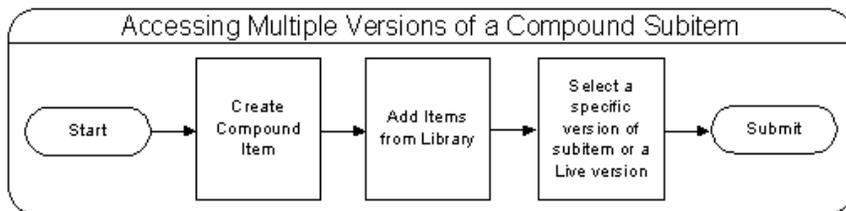


Figure 3–1 depicts the process to select a specific or live version for a compound subitem.

Quick Create

To add subitems, you can either use the Search LOV or the Quick Create icon to quickly create a subitem. In the Quick Create page, enter the required details and click the Submit button. A subitem is created and is submitted for approval along with other main items. Also, the content item is not approved until and unless the subitems are approved.

Deleting Subitems

You can select a subitem and click the Delete icon to delete it.

3.2.3 Renditions

Renditions provide the ability to upload the same content in many formats such as pdf, doc, and rtf. Renditions are primarily identified (auto detected), based on the multipurpose internet mail extensions (mime) type when files are uploaded. There can be only one file for a given mime type. You can also specify a default rendition for the selected mime type. For any file, if the mime type is not mentioned, the default value is selected. Applications can use OCM APIs to retrieve these renditions based on the mime types.

To add renditions, navigate to the Renditions link and click the Add Another Row button. Browse for the file and click the Submit button.

3.2.4 Associations

A content item can be linked to any E-Business Object. For example, if the product team requires a product specification document, the document can be created and stored in the content repository. By using the association feature, it can be associated to the product. Currently, from the OCM UI, you can associate content to only Products.

To associate a product, click the Add button. A new row is added with a drop-down list. Select the Product and click the Search LOV to select an object from the Inventory.

3.2.5 Meta Information

You can navigate to this link to modify the meta information such as availability and expiration dates, keywords, translations required, view version details, and so on. In the keyword field, you can enter a small description of the content item. This description helps the library users to search content items based on the keywords. For more information on search features, see [Section 3.6, "Browsing Content Items"](#).

Note: If you do not enter availability and expiration dates, then the content item is available for immediate use and it never expires.

3.2.6 Categories

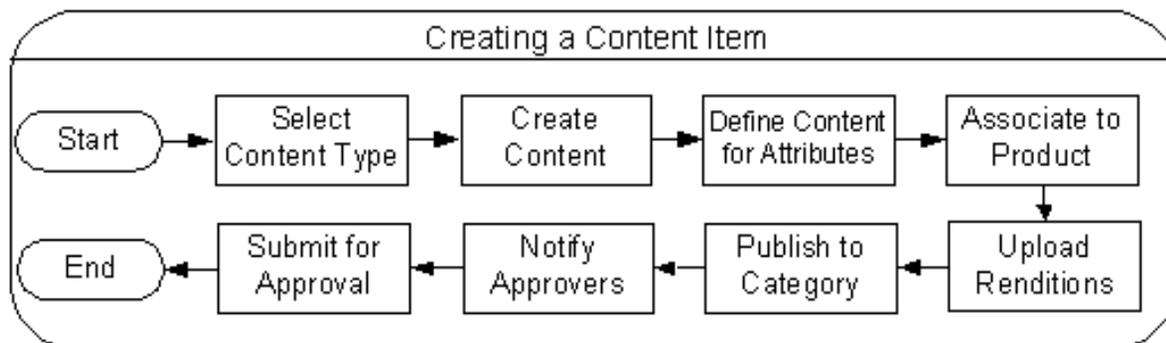
While creating a content item, you can select a category to publish the content item, after it is approved. You can publish the content to the category, if you have Publish Category permission.

For information on categories, see [Chapter 6, "Managing Categories"](#).

3.3 Creating and Managing Content Items

[Figure 3–2](#) depicts the flow to create a content item. Use this procedure to create and manage content items.

Figure 3–2 *Creating a Content Item*



Prerequisites

Content Types must exist.

Steps

1. Login with Manage Item permission and navigate to Content > My Content horizontal link.
2. Click **Create Item**.
The Create Item page appears.
3. Select a content type from the Content Type drop-down list.
4. Enter the required details.
5. Optionally, select the Translation Required check box to indicate that the content item must be translated.
6. Click **Continue**.
7. Enter the necessary details in the Attributes region that corresponds to the content type.

8. To add items from library, select an attribute from the Attributes LOV and click **Add**.

This region is enabled only if you have selected a compound content type.

- a. To select a content item, click the **Search** icon.

Only approved content items are listed.

- b. To use Live version of the content item, select the Use Live check box.
- c. Optionally, you can use **Quick Create** to quickly create a subitem.
- d. To add another content item as an attribute, select the appropriate content type and click **Add**.

9. To present the content in different formats, click the Renditions link.

- a. Click the **Add Another Row** icon.
- b. Click **Browse** to select a file.
- c. To set a default renditions, select a row and click **Set as Default Renditions**.

10. To associate the content with Products in the inventory, click the Association link.

- a. Select an association type from the Association LOV and click **Add**.
- b. Click the Search icon to search for the object to be association.

11. To enter meta information details, click the Meta Information link.

- a. Enter the required details.
- b. Optionally, enter a text in the Keyword field. This text is used to search the content item in the Library.

12. To publish the content item to a category, click the Categories link and select a Category.

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

The content item is created with the status In Progress. This option allows you to create an item, and update it later.

14. Optionally, to preview the content, click **Preview**.

You can preview the content, only if you have selected **Save for Later** option.

15. Click **Submit**.

The content item is submitted for approval.

3.3.1 About Submitting Content Items for Approval

When a content item is submitted for approval, the content item is created and one of two things can happen:

- An e-mail notification is sent to the approvers that a content item has been submitted for approval.
- The content item is saved with the status Submitted. If the content item creator has the Approve permission on the folder where the content item is stored, the item is saved as Approved.

3.3.2 About Locking Content Items

You can lock or unlock content items if you have the Manage Item permission. A content item can be locked only if it is not locked. After you lock a content item, only you can unlock it. Each time a content item is locked or unlocked, a log is created in the item history.

3.3.3 About Copying Content Items

You can copy content items from one folder to another. Only the latest version of the item is copied to the destination, as a new content item. To copy a content item, you must have the Read Item permission on the source folder and the Manage Item permission on the source folder. You can copy the content item as a different name by entering a name in the Copy As Name field. If the name already exists in the destination folder, an error is displayed and you can select another name. All the folders on which you have Manage Item and Manager Folder permission are listed. You can select the destination folder from the displayed list.

3.3.4 About Removing Content Items

You can remove a content item that is not required. When you remove a content item, it is not deleted permanently but is moved to the Trash tab. You can restore it from the Trash tab.

You cannot delete a content item if it is:

- Locked by another user.
- Associated with a Business Object.

- Used as a subitem in a compound content item.
- Published to a category
- Submitted for approval.
- Used as a default stylesheet for a Content Type.

3.4 Managing Content Item Versions

You can do the following to manage versions of a content item:

- **Create New Version:** After a content item is approved or submitted for approval, you cannot update it. In such scenarios, you can create a new version of the content item and update it.
- **Update Latest Version:** If the content item status is In Progress, you can update the latest version of the content item.
- **Update Another Version:** If you want to make another version of the content item as a live version, you can select this option.

Use the following procedure to manage content item versions.

Prerequisites

None

Steps

1. Login with Manage Item permission and navigate to Content > My Content horizontal link.
2. Select the required content item.
3. To create a new version, select Create New Version from the Actions LOV.
The Create Content Item page appears. Make the required changes and click **Submit**.
4. To update the latest version of the content item, select Update Latest Version from the Actions LOV.
The Create Content Item page appears. Make the required changes and click **Submit**.
5. To update the another version of the content item, select Update Another Version from the Actions LOV.

The Version History page appears displaying all the versions of the content item including the translations.

- a. To update the selected version, click **Update**.
- b. To create a copy of the selected content item, click **Copy**.
- c. To make the selected version live, click **Live**.
- d. To delete the selected version, click **Delete**.

3.5 Exploring Content Item Details Page

The Content Item Details page is a read only page. It provides detailed information about a content item. The information shown is for a specific version and language of a content item. The screen provides meta information, version related information such as base language attributes and translated attributes. Both the static and dynamic attributes are displayed and attachments are shown as hyperlinks. In case of compound content items, the subitem details are also displayed. In this page, you view content item details such as item history, item usage, versions, item associations, and preview the content item.

You can access the Content Item Details page by clicking the hyperlinked content item from anywhere in the application.

Previewing Content Items

A stylesheet indicates to the browser how to render the content on the Web. You can preview a content item with its default stylesheet. The content item details are displayed in the way the stylesheet is defined. This helps the user to see how the content item looks in the HTML page.

Viewing Item Version History

You can view all the stages (such as when was it created, who updated it, and so on) that the content item has passed through by viewing its history. When the approver rejects a content item, its status changes to Rework. For such items, the history page displays the comments inserted by the approver while rejecting the item.

Viewing Item Usage

In this page, you can view if this content item is used as a subitem in any compound content item.

3.6 Browsing Content Items

You can browse or search for the a content item in the repository by using the Browse Content Items feature. You can use this page to:

- Create personalized views and browse the list of content items.
- Search the content items by either using simple or advanced searches.

To browse the content items, click the Browse Items button. The Browse Items page appears listing the content items details such as the version status, parent folder details, and so on. You can personalize the view to list only the selected content items.

Using Simple Search

You can use the simple search utility to search content items based on the content type, content item name, description, or a string of characters in the content item.

Using Advanced Search

You can use the advanced search utility to search content items based on specific parameters. You can select the parameters listed in the LOV and add them to the search criteria. If you are providing multiple parameters, you can choose to search the content item based on any or all conditions.

3.7 Understanding Bulk Upload

The bulk upload feature allows you to upload a zip file to create many content items at once. The contents of the zip file are extracted to create content items in the folders. You can browse for the required folder to create content items in bulk. If you have Manage Folder permission, you can select the Maintain Folder Hierarchy check box to create the folder hierarchy, if any, in the zip file. While extracting, the content types are mapped to the defined file extensions. If a content type is not mapped to an extension, then, by default, it is mapped to the seeded content type FILE.

While copying the content items to the folder, you can rename the content items. When you submit the zip file for bulk upload, a concurrent program is invoked and it returns a request ID. You can use this ID to track the file statuses.

For information on mapping file extensions, see *Oracle Implementation Guide*.

The Bulk Upload Page

In the Bulk Upload page, the Meta Information region consists of the following fields:

- **File Name:** Allows you to browse and upload the zip file.
- **Extract to:** Select a folder where content items must be created. By default, the home folder is selected. You can use the Search LOV to select a different folder that you have access to.
- **Maintain Folder Hierarchy:** This check box is enabled only if you have Manage Folder Permission. If you select this check box, you can create subfolders based on the folder hierarchy of the zip file.
- **Continue:** To navigate to Bulk Upload Review page, you can click the Continue button.

The Bulk Upload Review Page

In the Bulk Upload Review page, you can map and modify content types to content items. The bulk upload function creates content items in the selected folder and you can rename the files while creating them. But, if there is a conflict in the file name, the system generates unique file names. Otherwise, the content items are created, based on the Copy As file name.

If a file extension does not match any value in the drop-down list, by default, it is mapped to content type called FILE. If multiple content types are mapped to the same extension, you can modify the mapping.

For example, if a .pdf is mapped to White Papers and Data sheets, you can choose to update the mapping details in this page. Also, for Image types with specific extensions, the height and width is auto detected. The content types FILE and IMAGE are seeded.

Bulk Upload Summary Page

You can navigate to this page to view the status of the bulk upload request.

3.8 Creating Bulk Uploads

Use the following procedure to create bulk uploads. You can upload only a .zip or a .ZIP file.

Prerequisites

Keep a zip file ready.

Steps

1. Login with Manage Items permission and navigate to Content > My Content page.
2. Click **Bulk Upload**.
3. To upload the zip file, click the **Search** icon next to the File Name field.
4. Select the .ZIP or .zip file and click **Open**.
5. To create subfolders based on the folder hierarchy of the zip file, select the Maintain folder hierarchy while extracting check box.
6. To translate the content items, select the Translation check box.
7. To extract the contents in the zip, click the Search icon next to Extract To field.
8. Click **Continue**.

The Upload Summary page appears listing the contents of the zip file.

9. To change the name of the item or the folder, enter the name in the Copy As field.
10. To map the item to the content type, select a value from the Content Type field.
11. Click **Submit**.

The Confirmation page appears and a concurrent request is submitted for processing. You can navigate to the Bulk Upload Summary page to view the status of the content items.

3.9 Trash Overview

A deleted content item or a folder is moved to the Trash tab. You can restore or permanently delete them based on the permissions you have. For a list of permissions required to manage the Trash tab, see [Table 3-1](#).

Table 3-1 Permissions Required to Manage Trash

Action	Permission Required
To remove folders	Manage Folder and Manage Item
To restore folders	<ul style="list-style-type: none">■ Create Folder on the parent folder.■ Manage Folder and Manage Item on the folder being restored.
To remove content items	Manage Item
To restore content items	Manage Item
To delete folders	Manage Folder and Manage Item
To delete content items	Manage Item

You can perform the following actions based on the access permissions that you have:

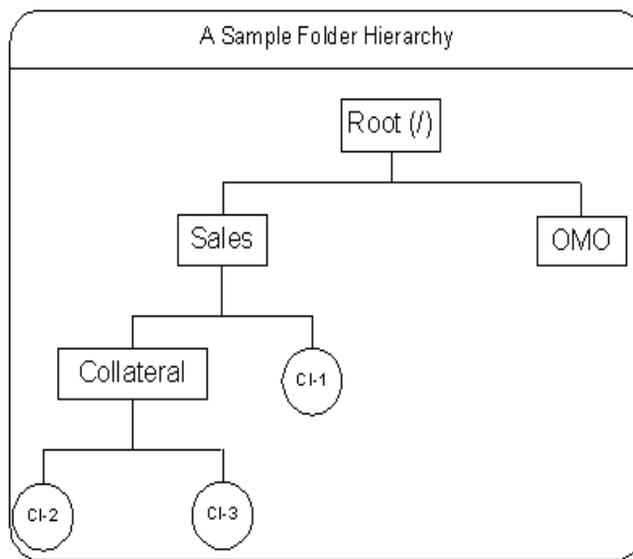
- View all the content items and folders in the Trash tab or choose to view only content items.
- Delete the content items or folders permanently.
- Restore the content items or folders.
- View the content item details before deleting or restoring the content items.

3.9.1 About Restoring Folders

After content items are restored, they are no longer visible in the Trash tab. They are moved back to the folder from where they were removed with the same status.

To understand how to restore a folder, consider the following sample folder hierarchy as shown in [Figure 3-3](#).

Figure 3-3 Folder Hierarchy



- To restore /Sales/Collateral, you must have Manage folder permission for the Sales folder. You can restore /Sales/Collateral only if /Sales is active, that is, it is not in Trash.
- If you have removed /Sales/Collateral and then removed /Sales, when you restore /Sales, only /Sales is restored as /Collateral was removed explicitly. Also, from Trash, you cannot navigate to the subfolder if the subfolder is also removed.
- If you restore Collateral, the content items CI-2 and CI-3 are also restored.

3.10 Deleting or Restoring Folders and Content Items

You can delete folders, only if you have Manage Folder permission. While deleting a folder, all items in the folder are deleted.

Use this procedure to either delete or restore, a folder or a content item.

Prerequisites

None

Steps

1. Login with Manage Folder permission and navigate to Content > Trash horizontal link.
2. To delete folders or content items, select them and click the **Delete** button.
The folders or the content items are permanently deleted and cannot be retrieved.
3. To restore folders or content items, select them and click the **Restore** icon.
The folders or content items are restored.

Managing Pending Approvals

This chapter discusses the process of approving or rejecting a content item. Sections in this chapter include:

- [Section 4.1, "Approval Process Overview"](#)
- [Section 4.2, "Approving or Rejecting Content Items"](#)

4.1 Approval Process Overview

Approvals are required to ensure content completeness and accuracy. The approvers receive e-mail notifications, notifying them that a content item or a translation is submitted for approval. All the content items that are submitted for approval are listed in the Pending Approvals page. The approve must navigate to this page to approve. After approving, the content item is removed from the Pending Approvals page.

In the Pending Approvals page, an approver can perform the following tasks:

- View the list of pending approval items by selecting either All, Translation Approvals, or Content approvals from the View LOV.
- Preview a content item before approving or rejecting a content item by clicking the Preview button. You can preview the content item by using the default stylesheet or a different stylesheet, if the content type is mapped to any other stylesheet.
- View content item details by clicking the hyperlinked content item.
- Approve a content item that is pending for approval by clicking the Accept button.
- Reject a content item that is pending for approval by clicking the Reject button.

Notifications Sent to Approvers

The approvers receive a notification when a content item has been submitted for approval, and when a content item is waiting for translation approval. OCM uses Oracle Workflow to send notifications to the 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*.

4.2 Approving or Rejecting Content Items

As an approver, you are responsible to ensure that the content is complete and accurate before you approve a content item. You can preview the content item before approving or rejecting. If the content item does not meet the required standards, you can reject it. When it is rejected, its status changes to Rework. When a content item is approved, its status changes to Approved.

Use the following procedure to approve or reject content items.

Prerequisites

None

Steps

1. Login with Approve Item permission and navigate to Content > Pending Approval horizontal link.

You may select multiple content items to approve.

2. To approve a content item, click **Approve**.
 - A notification is sent to the translator in case of translation approval.
 - A notification is sent to the content item creator and the owner, that the item is approved. A notification is also sent to the translator for translation approval, if the content item is marked for translation.
3. To reject a content item, click **Reject**.

The Pending Approvals: Comments page appears. Enter your comments in the space provided. You must state the reason(s) for rejecting the content item(s). If you have selected multiple items, the comments apply to all the rejected items.

4. Click **Submit**.

Managing Translations

This chapter discusses all the tasks related to content item translation. Sections in this chapter include:

- [Section 5.1, "Translation Overview"](#)
- [Section 5.2, "Translation Process"](#)
- [Section 5.3, "Translating and Updating Content Items"](#)
- [Section 5.4, "Uploading Quick Translations for a Content Item"](#)

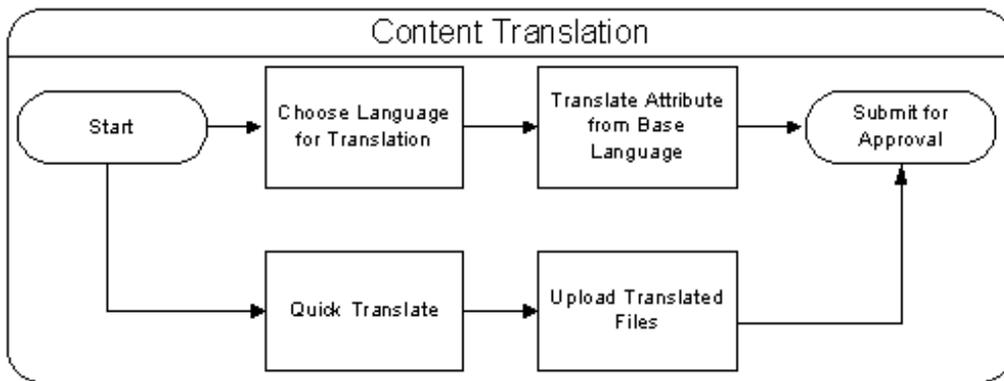
5.1 Translation Overview

Oracle Content Manager (OCM) supports the ability to send notifications to the translators that the content is ready for translation. It also provides an interface to track the translation details. Content items to be translated can be created in the base language and then translated to the required language. OCM stores multiple versions of the translated content items.

5.2 Translation Process

OCM uses Oracle Workflow to send notifications to translators. [Figure 5–1](#) depicts the translation flow.

Figure 5–1 Content Translation Flow



The process to translate a content item is listed below:

- After the content item that requires translation is approved, the translator receives a notification.
- The translator logs in and navigates to the folder and selects the content item to be translated.
- The translator must select Update Translation from the Action drop-down list and click the Go button.
- The translator must enter translation details and click the Submit button for approval.

- A notification is sent to the users with the Approve Translation permission to approve the content translations.

Approval Workflow and 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, see the *Oracle Workflow Administrator's Guide*.

5.2.1 Submitting for Translation

Before submitting the content item for translation, you can view the content item details. The details are displayed in the base language. The base language is the language that the content item was originally created.

5.3 Translating and Updating Content Items

Only users with Translate Permission can submit a content item for translation approval. The status of the content items must be Approved.

Use the following procedure to submit the content item for translation approval.

Prerequisites

None

Steps

1. Login with Translate Item permission and navigate to the required folder and select the content item to be translated.
2. From the Actions LOV, select Update Translation and click **Go**.
The Translate: <content item name> page appears.
3. Select the approved Content Item version to be translated and click **Translate**.
In the Translation page, the following fields are displayed:

- The content item column lists all the versions of the content item along with the languages in which the item can be translated. You can click the hyperlinked version to view the content items in its base language.
 - The Translation Status column lists the status of a given translation. The statuses are In Progress, Rework, Submitted, and Approved.
 - The Live column displays if the version is live.
 - The Base Language column indicates the base language of the item for the version.
 - The Quick translate icon allows you to quickly translate the items with file attachments. Only file attachments can be uploaded. This button is disabled if the content item does not have any file attachments.
 - The Preview icon allows you to preview the version in the specific language.
4. Select the language to translate and click **Translate**.
The *"Translate: Content Item, Version n"* page appears.
 5. Optionally, in the Content Details region, you can clear any image attachment and click **Browse** to upload any file attachment.
 6. Click **Submit**.
The Confirmation page appears as it submits translation for approval.
 7. Optionally, click **Preview** to view the content item as it will appear when it is published and goes live.
 8. Optionally, to submit for translation later, click **Save for Later**. The status changes to In Progress.

5.3.1 Viewing Translation History

A content item can be translated to several languages. To view a content item's translation history, from the Translations Results: *<content item name>* region, select the content item and click the **History** icon. The details such as the language it is translated to, date and time of translation, and so on are listed.

5.4 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 use Quick Translate to translate content items that have only file attachments.

If a content item has multiple attributes along with a file attachment, you can use Quick Translate to translate the file attachment, and for attributes follow the normal process.

Quick Translation helps you to quickly upload several translations from a single page, instead of submitting several translations one after the other. Use the following procedure to upload quick translations.

Prerequisites

None

Steps

1. Login with Translate Item permission and navigate to the required folder and select the content item to be translated.
2. From the Actions LOV, select Update Translation and click **Go**.
The Translate: <content item name> page appears.
3. Select the approved Content Item version to be translated and click **Translate**.
4. From the Translations tab's Results: <content item name> region, select the content item whose translations you want to upload.
5. 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.
6. To replace a new image for translation, click the **Replace** icon and click **Browse** to locate the translated attachment from your local hard disk or from the network.
7. Click **Submit**.

The Confirmation page appears. Clicking Submit will submit all the In Progress translations for approval.

8. Optionally, to submit for translation later, click **Save for Later**. The status changes to In Progress.

6

Managing Categories

This chapter explains how to publish content to a category and view content in a category. Sections in this chapter include:

- [Section 6.1, "Understanding Categories"](#)
- [Section 6.2, "Publishing and Viewing Content Items"](#)
- [Section 6.3, "Library Overview"](#)
- [Section 6.4, "Searching Content Items"](#)
- [Section 6.5, "Previewing Content Items"](#)

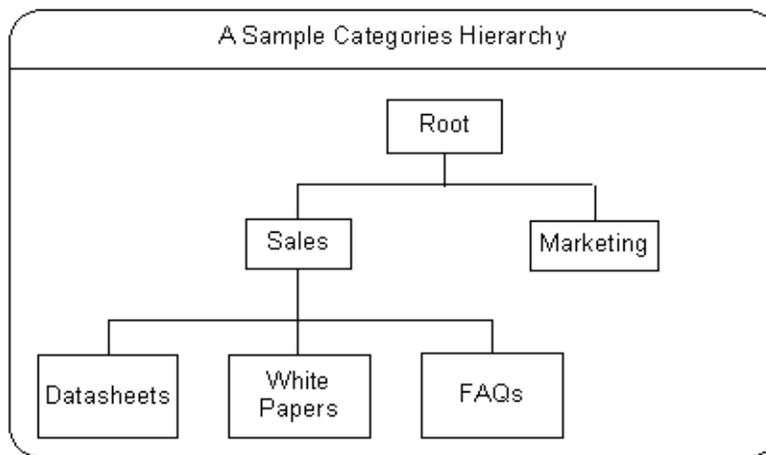
6.1 Understanding Categories

A category is a specifically defined classification, which is used to logically group a set of content items together. While folders are work areas to organize content items, categories reflect more of a business group. Many organizations define content that can be classified into one or more categories. Categories also have a hierarchy of subcategories for finer classification. You can browse the library based on the categories.

Root Category

The Root category is the highest level in the category hierarchy. The Root category is seeded and any seeded category cannot be deleted or renamed. You can create a category under the Root category depending on the permissions you have. See [Figure 6–1](#) for a sample categories hierarchy.

Figure 6–1 Categories Hierarchy



In [Figure 6–1](#), Sales and Marketing are two categories under the Root category. Similarly, many such categories can exist under the Root category and subcategories under categories. Data sheets, White Papers, and FAQs are examples of subcategories under Sales.

6.1.1 Category Access Control

To maintain a category hierarchy, it is necessary to have robust data security to provide fine grain access control to different users at different category levels. Category access control involves assigning Users or Groups the permissions to access a category. Access control is a combination of permissions and exclusions.

Permissions

Permissions for a category are granted at Users, Group, Responsibility, or Global levels.

Table 6–1 lists the category permissions.

Table 6–1 Category Permissions

Permission	Description
Manage Category	Allows you to create, update, and delete a category.
Publish Content	Allows you to publish content to a category.
View Content	Allows you to view the published content. A library user must have this permission to view and browse the content in the library.

Exclusions

A category can maintain an exclusion list to exclude certain users or groups by revoking their permissions.

6.1.2 About Creating and Managing Categories

If you have Manage Category permission, you can create and manage categories. Typically in an organization, only Category Administrators are given this permission. As a Category Administrator, you can assign content items to one or more categories. Only live versions of the content items can be assigned to the categories. Also, you can view, publish, or remove the content items from a category.

6.2 Publishing and Viewing Content Items

You must have the Publish Content permission to publish the content items to a category. You can publish only the live version of the content items. To view the content items published to a category, you must have View Content permission assigned to you explicitly.

Use this procedure to publish a content to a category and to view the content items published to a category.

Prerequisites

None

Steps

1. Login with Publish Content permission and navigate to Categories.
2. Select a category and click **Update Category**.
The Update Category page appears.
3. Select the Content link and click **Add Another Row**.
4. Click the search LOV and select a content item.
5. Optionally, to delete a row, click **Delete**.
6. To preview the content, click **Preview**.
This option is enabled only if you have View Content permission.
7. To publish the content, click **Apply**.

6.3 Library Overview

A library is a repository of content items that are live and approved, and published to the categories. You can search for a content item under a category or across all categories. In the library, you cannot view a category if you do not have access to it or one of its subcategories.

6.4 Searching Content Items

You, as a library user with View Content permission can browse content items based on the categories. You can view content items that are active and unexpired in a category. You can search for a content under a specific category or across all the categories. Using Advanced Search you can search content items based on parameters such as content type, item code, keyword, and so on.

Use the following procedure to locate a content item.

Prerequisites

None

Steps

1. Login as a Library user and navigate to the Library horizontal link.
2. To search a content in a category or across categories using simple search, enter the name of the content item in the Search field and select a value from the LOV.
 - a. Click **Go**.

The matching content items are displayed in the Categories region with the content item name, description, last updated date, and preview icon.
 - b. To further narrow your search, that is, to search for a content item within the search results, you can enter the name of the content item in the Search field.
 - c. Click **Go**.

The search results appear in the Results region.
3. Optionally, to use advanced search, click **Advanced Search**.

The Advanced Search page appears.

- a. 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.

- b. Click **Go**.

The search results appear in the Results region.

References

[Table 6–2](#) describes the fields in the Advanced Search page.

Table 6–2 Advanced Search Page Fields

Name	Description
Content Parameters Region	-
Content Type	Type of the content item.
Content Item Contains	Use the Search LOV to select the content type. A page appears displaying the attributes of the content type. You can enter search criteria and do an intermediate search on the content.
General Parameters Region	-
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.
Item Code	The item code of the content.
Keyword	The keyword entered while creating a content item.
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.
Description	Description about the content item. Use the drop-down list to select the condition, and enter the 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.
Category	Select a category to which the content item is published.

Table 6–2 Advanced Search Page Fields

Name	Description
Expiration Date is	Date until 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.

6.5 Previewing Content Items

Use this procedure to preview a content item using the default or any other stylesheet.

Prerequisites

None

Steps

1. Login as a Library user and navigate to the Library horizontal link.
2. After searching for the required content item, in the search Results region, click the **Preview** icon.

The content item is displayed with the default stylesheet.

3. To preview the content with a different stylesheet, if any, select a stylesheet from the LOV and click **Go**.
4. Click **Go**.

The content item is displayed using the different stylesheet.

Creating Cover Letters

This chapter explains the concepts to create cover letter content types and cover letters. Sections in this topic includes:

- [Appendix A.1, "Cover Letter Overview"](#)
- [Appendix A.2, "Understanding Cover Letter Content Types"](#)
- [Appendix A.3, "Creating and Managing Cover Letter Content Types"](#)
- [Appendix A.4, "Creating Cover Letters"](#)
- [Appendix A.5, "About Queries"](#)

A.1 Cover Letter Overview

A cover letter is the document that is received by the customer. It can be defined as an outbound content sent to consumers about an offer. It is used to communicate about an offer, information or a message. Typically, a cover letter is created by marketers. It can contain attachments such as data sheets, white papers, analyst reports, press releases, and so on. The cover letters are fulfilled through e-mail, fax, and print channels.

The content used for the cover letter is stored in Oracle Content Manager (OCM) central repository. The advantages of using OCM are:

- It ensures that the message is consistent, when executed through all channels of execution.
- It helps organizations to maintain the integrity of the content and keep track of its usage.
- It allows organizations to maintain control over the content by giving users the access permissions on folders, by creating content type groups, and by having approval process to approve the content.
- It restricts users to access the content by having access permissions on folders, creating content type groups, and approval process.

A.2 Understanding Cover Letter Content Types

A cover letter content type is like a setup template that you can use while creating a content. It provides best practices that enable you to create standardized content. It contains detailed information such as attributes, data types, and blocks that are required to create a cover letter. To enable this, few seeded content types are available. Only administrators can create content types.

While creating content types, you can:

- Restrict the content type to be made available to only certain groups by mapping them to content type groups such as e-mail, print, and fax.
- Decide to set default attributes for the cover letters.
- Make the attributes unupdateable.
- Specify the stylesheet to be mapped to the content type.
- Associate multiple stylesheets to a content type. This feature enables users to view the content or attachments using any stylesheet that is associated with it. Also, a default stylesheet can be mapped to the content type.

Other users can duplicate the seeded content types and modify their structures by updating the attributes.

Notes:

- If the content type is used to create a cover letter or is in In Progress status, you cannot update the content type.
 - To create cover letters and content type groups that are relevant to cover letters, you must use the options that are provided with Cover Letters and not the generic OCM UI. Also, to map the content types to different groups, you must use this UI and not the OCM Content Type Groups UI.
-
-

Content Type Summary Page

In the Content Type Summary page, you can choose to view all, seeded, or inactive content types. The results are displayed in a tabular format listing the content type details such as the owner's name, its status, and so on.

A.2.1 Cover Letter Content Type Attributes

To create new content types, you can either copy seeded content types or create new ones based on the following attributes:

General

In this region, enter the name of the content type, select the status, and select the content type group. You can only select a content type with the status Active. You can also select a default stylesheet for the cover letter.

For more information on stylesheets, see *Oracle Content Manager Implementation Guide*.

Header, Content Block, and Footer

You can use these regions to provide content in text format and images. Typically, the header and footer regions are used to provide corporate address, copyrights, contact information, terms and conditions, company logo, and so on. You can also define a default cover letter and make it unupdateable.

If these regions are enabled, then while creating cover letters, users can select a live and approved version of the content from the repository based on their permissions.

Body

You can enter the HTML text for e-mails in this region. For non-HTML compliant users, you can display the content in text format. If the content type has a query associated with it, then you can choose to embed the merge fields. You can select one or more merge fields from the associated query to embed in the cover letter. These are written in SQL (Structured Query Language) format. Query items are stored in Oracle Content Manager (OCM) as cover letters of type Query.

Typically, queries are created and modified by the Marketing Administrators. For more information on Queries, see *Oracle Marketing User Guide*.

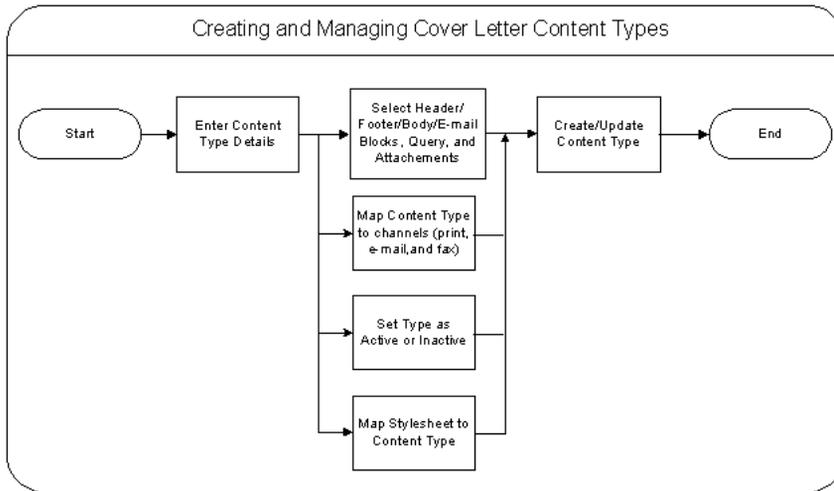
Attachments

You can send attachments of any file type with e-mails and faxes. But only .rtf and .pdf file attachments can be printed.

In e-mails, you can send binary files as attachments. You can specify the attachment details in this region. If this region is enabled, then while creating cover letters users can search the attachments based on cover letter name, description, and cover letters that are associated with Products or Offers. The search returns all cover letters that are live and approved from the repository, based on the permissions that you have.

A.3 Creating and Managing Cover Letter Content Types

Only administrators can create content types. [Figure A-1](#) depicts the process to create a cover letter content type and the same is explained below:

Figure A-1 Process to Create and Manage Cover Letter Content Types

- Map the content type to different groups such as e-mail, fax, and Print.
 - Define the requirements for the cover letters, such as header, body, e-mail blocks, queries, and footer.
 - Define if the blocks must be displayed and set the default values.
 - Define if the content can be updated.
 - Create active content types so that they are available to create cover letters.
 - Specify the default stylesheet for the content type.
- By default, the seeded stylesheet (provided by OCM), is selected.

Notes: It is recommended that you understand the requirements of your organization before you define the attributes for the content type. This is because, after a content type is used to create a cover letter, you cannot update it. To update such a content type, you must first duplicate it and update the duplicate copy.

Use the following procedure to create and manage cover letter content types.

Prerequisites

None

Steps

1. Login with the One-to-One Fulfillment Administrator responsibility and navigate to Content > Content Type.
2. Click **Create**.
The Create Content Type page appears.
3. In the General region, enter details in all the mandatory fields.
 - Select the status to be active so that it is available to create cover letters.
 - Select the groups for which the content type must be available. You can see that a default stylesheet is selected.
4. To define Header attributes for the content type, select the appropriate Display check boxes.
 - To default the content in the Header Block and Header Image regions, select a value from the Search LOV.
 - Select a value for the Updateable field from the drop-down list. While creating a cover letter, this field indicates if the default value can be updated by the user or not.
 - Select a value for the Required field from the drop-down list. While creating a cover letter, this field indicates if this field must be a mandatory field.
5. To select a query for the mail merge in the body of the cover letter, select a query from the Search LOV.
6. To define a content block in the Content Blocks region, select a value from the Search LOV.
 - To default the content in the Content Block, select a value from the Search LOV.
 - Select a value for the Updateable field from the drop-down list. While creating a cover letter, this field indicates if the default value can be updated by the user or not. This is applicable for all the fields in other regions also.

- Select a value for the Required field from the drop-down list. While creating a cover letter, this field indicates if this field must be a mandatory field. This is applicable for all the fields in other regions also.
- 7. To define Footer attributes for the Content Type, select the appropriate Display check boxes.
 - To default a content in the Footer Block and Footer Image regions, select a value from the Search LOV.
 - Select a value for the Updateable field from the drop-down list.
 - Select a value for the Required field from the drop-down list.
- 8. To define an attachment in the Attachments region, select a file from the Search LOV.
 - Select a value for the Updateable field from the drop-down list.
 - Select a value for the Required field from the drop-down list.
- 9. Optionally, to preview the selected attribute, click the Preview icon.
- 10. Click **Save**.

The cover letter content type is created.

- 11. To update a content type:
 - a. Select the content type and click **Update**.
The Create Content Type page appears displaying the content type details.
 - b. Update the required fields and click **Apply**.
The content type is updated.
- 12. To duplicate a content type:
 - a. Select the content type and click **Duplicate**.
A duplicate copy of the content type is created.
- 13. To delete a content type:
 - a. Select the content type and click **Delete**.
The content type is deleted.

A.4 Creating Cover Letters

To create cover letter contents you must:

1. Select a cover letter content type from the Create LOV and click the Go button.
2. Provide content details.

Note: The content type, which you select determines the content details that you must provide.

Selecting a Content Type

You must select a content type from the Cover Letter Summary page. In this page, select a content type from the Create LOV and click the Go button. In this page you also:

- Sort content types based on the Content Type Group.
- List all the cover letters that are created using a particular content type.
- Search cover letters based on the owner, name, location, last update date, version, and description.

Cover letter contents are stored in folders. For more information on folders and permissions, see *Oracle Content Manager Implementation Guide*.

Use the following procedure to create cover letters.

Prerequisites

A content type must exist.

Steps

1. Login with the One-to-One Fulfillment Administrator responsibility and navigate to Content > Cover Letter.
2. Select a content type from the Create drop-down list and click **Go**.
The Create Content page appears.
3. Enter name, description, owner, and location details in the respective fields.
4. In the Header region, select the values for content block and content image from the Search LOV.

- This region is enabled only if it is defined while creating the selected content type. You can select cover letters of type Image or Content Blocks from a list of values. The search result lists all the cover letters that you have access, which are live versions.
 - If this region is enabled, then you can select images or content blocks for the body header.
 - While defining the content type, if the fields are defined as non updatable fields, then you cannot update them. You can only view the defined values.
 - To add more content blocks and images, click **Add another Row**. The order in which you add the contents are maintained during execution.
5. In the Body region, enter the text for the e-mail and fax body.
- You can enter the content for the e-mail in an HTML format. If the e-mail is for non-html clients, you can choose to display the e-mail content in text format by clicking **Edit Text Version**. The content created for Fax groups will display the content in HTML format.
 - If the content type has any query associated with it, you can insert mail merge fields based on the available fields, either individually or all at once.
 - Users can insert mail merge fields based on the available fields.
 - To add the query mail merge fields individually, select the query and click <. Optionally, to add all the queries for mail merge, click <<.
6. In the Content Blocks region, select a content block from the Search LOV.
You can add another content block in the Content Block region by clicking the Add Another Row button and selecting a content block from the Search LOV.
7. In the Footer region, select the values for content block and content image from the Search LOV.
You can add another content block in the Footer region by clicking the Add Another Row button and selecting a content block from the Search LOV.
8. In the Attachments region, select the file for the attachment from the Search LOV. All the files in the repository are displayed.
- You can search for attachments that are associated with Products or Offers, which are part of the campaign schedule. The search result lists all the cover letters that you have access and which are live versions.

- You can also upload attachments from the desktop. By default, the attachments are saved in the same folder as the cover letter. You can select a different folder for which you have the Create Item permission.
 - You can add another content block by clicking the Add Another Row button and selecting a content block from the Search LOV.
9. In the Content Renditions region, you can upload .pdf file for e-mail content.
- This region is enabled only for Print groups.
 - You can upload .pdf or .rtf files for as the print renditions for cover letters. The .pdf or .rtf files may contain merge fields which are related to the query associated with the cover letter. For instructions on how to create a .rtf or .pdf documents, see *One-to-One Fulfillment User Guide*.
10. Optionally, click **Save for Later**.
- The cover letter is created with the status In Progress. This option enables you to create an item, and update it later.
11. Optionally, to preview the content, click **Preview**.
- You can preview a content, only if you have selected the **Save for Later** option.
 - You can also preview the content in text format.
12. Click **Submit for Approval**.
- The cover letter is submitted for approval.

A.4.1 About Submitting for Approvals

After submitting the cover letter content for approval, either one of the following happens:

- The cover letter is submitted for approval based on the status of the cover letter or any of the attachments.
- If any of the attachments are in Rework status or In Progress status, you cannot submit the cover letter content for approval.
- If all the attachments are approved, then the content goes through OCM Content Approval process. The status of the cover letter content changes to Submitted. You cannot update the content in this status.
- A cover letter is approved only after all its components are approved.

A.4.2 About Searching for Cover Letters

In the Cover Letter Summary page, you can narrow the search based on the content type groups, that is, e-mail, fax, and print. You can also search for cover letters based on the parameters such as cover letter name, description, folder location, and last update

The search returns all live versions of the cover letters for which you have read access permissions. The live versions are the latest approved versions of the item. There may be later versions of the item, which are In Progress status. You cannot update such items.

Note: You must not edit the cover letter content types and cover letters in the generic OCM UI as the attributes may not be displayed correctly.

A.5 About Queries

Queries are Structured Query Language (SQL) statements that generate selected data from a database. A query determines which records meet the defined criteria, and returns the matched records.

Queries are the source for the mail merge fields that can be embedded in the cover letter body. They are used to generate personalized tags for mail merge, which are fulfilled by Oracle One-to-One Fulfillment, at the time of execution. The Queries page lists all the queries. You can select an existing query to view the details or click the Create button to create a new query.

For details on queries, see *Oracle Marketing User Guide*.

A.5.1 Creating and Updating Queries

Use the following procedure to create and update queries.

Prerequisites

None

Steps

1. Login with the One-to-One Fulfillment Administrator responsibility and navigate to Content > Query.
2. Click **Create**.

The Create Query page appears.

3. In the Name field, enter a unique name for the query
4. Optionally, in the Description field, enter a description for the query
5. In the Query SQL field, enter the SQL SELECT statement.

It is not necessary to a semi-colon (;) at the end of the SELECT statement.

6. Click **Create**.

The query is created with a status of In Progress.

7. To update a query, select the query and click **Update**.
 - You can update the queries with status In Progress and Submit for Approval.
 - You cannot update the queries with status Approved.
 - In the Update Query page, update the required fields and click **Update**.

Glossary

Access Control

Access control is a combination of permissions and exclusions.

Association

The link of a content item to a CRM Object. For example, the link of a feature article to a particular product is an association.

Attachment

An attachment is part of the cover letter. It is similar to e-mail attachments. In the case of fax and print channels, the attachments are physically faxed or printed. Attachments can include data sheets, white papers, analyst reports, press releases, and so on.

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.

Bulk Upload

The Bulk Upload is a feature in OCM that allows you to upload a zip file to create many content items at once. The contents of the zip file are extracted to create content items in the folders.

Category

A category is a specifically defined classification, which is used to logically group a set of content items together. While folders are work areas to organize content items, categories reflect more of a business group. Categories also have a hierarchy

of subcategories for finer classification. You can browse the library based on the categories.

Collateral Content

Collateral can be defined as electronic marketing materials that are fulfilled to the target customers through automated processes such as print, fax, and so on. The automated processes of fulfillment can be through the channels of e-mail, fax, print, or Web channels. Collaterals are always outbound and the intended recipients are the target audience. Collateral consists of cover letters or attachments.

Compound Content Item

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.

Compound Content Types

A content type can have other content types as its components. Such content types are called compound content types. For example, a Product Brochure content type can have other content types such as Product Presentation, Product White paper, and Product Demo as its components. This makes Product Brochure a compound content type.

Content

A content is a structured data that is managed through a lifecycle to create, approve, translate, and publish. It can be anything from a text field to an image, audio, or a video file.

Content Item

A content item is a data of a certain Content Type. For example, if a feature article is a content type, then the specific article titled "Selecting the Right DB for your Company" is the content item.

Content Type

A content type is a logical set of attributes, attachments, and associations. Examples of content types: a Feature Article, Product info, Help File. They ensure that the data is consistent across the content items. Content Types are not to be confused with file types such as "file", "URL", "PPT", and so on. They are instead defined as types like "images", "white papers", or "sales presentation".

Content Type Group

A Content Type Group is a collection of content types. Content type groups are used to bundle a set of content types together.

Content Type Template

A content type template is used to predefine a structure for a cover letter in Oracle Marketing. Though the content type is defined in OCM, marketers create structures based on the parent content type structure and map it to activities or schedules.

Cover Letter

A cover letter can be defined as the initial document received by the consumer.

Current Folder

The current folder displays the details of the present folder and the folders you have navigated to reach the present folder.

E-Business Suite Objects

Objects that are not maintained by Oracle Content Manager. For example, an Inventory Item is an e-Business Suite Object maintained by ERP. A Campaign is an e-Business Suite object maintained by OMO.

Exclusions

Some people belonging to a Group, User, or Global can be denied to access a folder or a category.

File Attachment

The binary "file" that is part of a content item.

Folder

A folder is the area a person has access to, in order to manage (add, edit, remove, archive) content items. A person can only view folders and sub-folders that they permissions to access.

Home Folder

The Home Folder is the folder that appears when you navigate to the My Content tab. By setting a Home Folder, you can directly navigate to a folder that you use extensively. You can set any folder that you have access to as your Home Folder and choose to change it anytime.

Library

A library is a repository of content items that are live and approved, and published to the categories.

Live Version

The live version of a content item is the version that is recommended for use. It is an approved version that is recommended for usage. Modifications in the live version will impact all objects that refer to the live version. Live versions are setup in OCM.

Permissions

To perform the required action, a user needs to have the assigned permission. Permissions are assigned by OCM Super User mostly to access a folder or a category. Permissions are granted to Users, Group, Responsibility, and Global.

Renditions

Renditions provide the ability to upload the same content in many formats such as pdf, doc, and rtf. Renditions are primarily identified (auto detected), based on the multipurpose internet mail extensions (mime) type when files are uploaded.

Seeded Content Items

OCM provides some seeded style sheets. The seeded stylesheets cannot be modified.

Seeded Content Types

OCM provides some seeded Content Types on installation. These Content Types cannot be modified. A user can however duplicate these Content Types and modify the duplicates.

Stylesheets

Stylesheets are associated with Content Types. Style sheets tell the rendering engines how to display the content item to the calling application. Each Content Type may have many style sheets associated to it. Stylesheets are their own Content Types and individual Style sheets are stored in the repository like any other Content Item.

Subitems

Subitems are individual content items based on their corresponding content types. Examples: Product Image, Product Thumbnail Image, Product Demo, and Technical Specifications.

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.

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.

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