

Oracle Endeca Workbench

User's Guide

Version 3.1.2 • April 2013



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Preface

The Oracle Endeca Commerce solution enables your company to deliver a personalized, consistent customer buying experience across all channels — online, in-store, mobile, or social. Whenever and wherever customers engage with your business, the Oracle Endeca Commerce solution delivers, analyzes, and targets just the right content to just the right customer to encourage clicks and drive business results.

Oracle Endeca Commerce is the most effective way for your customers to dynamically explore your storefront and find relevant and desired items quickly. An industry-leading faceted search and Guided Navigation solution, Oracle Endeca Commerce enables businesses to help guide and influence customers in each step of their search experience. At the core of Oracle Endeca Commerce is the MDEX Engine™, a hybrid search-analytical database specifically designed for high-performance exploration and discovery. The Endeca Content Acquisition System provides a set of extensible mechanisms to bring both structured data and unstructured content into the MDEX Engine from a variety of source systems. Endeca Assembler dynamically assembles content from any resource and seamlessly combines it with results from the MDEX Engine.

Oracle Endeca Experience Manager is a single, flexible solution that enables you to create, deliver, and manage content-rich, cross-channel customer experiences. It also enables non-technical business users to deliver targeted, user-centric online experiences in a scalable way — creating always-relevant customer interactions that increase conversion rates and accelerate cross-channel sales. Non-technical users can control how, where, when, and what type of content is presented in response to any search, category selection, or facet refinement.

These components — along with additional modules for SEO, Social, and Mobile channel support — make up the core of Oracle Endeca Experience Manager, a customer experience management platform focused on delivering the most relevant, targeted, and optimized experience for every customer, at every step, across all customer touch points.

About this guide

This guide describes what business users can do in Oracle Endeca Workbench to modify an Endeca implementation.

Who should use this guide

This guide is intended for business users who are using Oracle Endeca Workbench to manage content in an Endeca implementation.

Conventions used in this guide

This guide uses the following typographical conventions:

Code examples, inline references to code elements, file names, and user input are set in `monospace` font. In the case of long lines of code, or when inline monospace text occurs at the end of a line, the following symbol is used to show that the content continues on to the next line: ↵

When copying and pasting such examples, ensure that any occurrences of the symbol and the corresponding line break are deleted and any remaining space is closed up.

Contacting Oracle Support

Oracle Support provides registered users with important information regarding Oracle Endeca software, implementation questions, product and solution help, as well as overall news and updates.

You can contact Oracle Support through Oracle's Support portal, My Oracle Support at <https://support.oracle.com>.

Chapter 1

Introduction

This chapter introduces Oracle Endeca Commerce and provides an overview of how to use Oracle Endeca Workbench to manage application content.

What is Oracle Endeca Commerce?

The Oracle Endeca product line is based on the idea that users want to explore data interactively and in real time, with an intuitive interface, regardless of the scale and complexity of the underlying data.

An Oracle Endeca Commerce application is designed to provide follow-on navigation options in addition to the results of a user's current query. By progressively narrowing available selections based on currently selected refinements, the application naturally guides users towards data that interests them. This approach has the advantage of highlighting relevant information that a user may not have been specifically searching for in the first place.

Furthermore, Oracle Endeca Commerce applications can bring together data from multiple, large data sources, without introducing additional complexity to the end user. This enables users to search, navigate, and analyze large volumes of information, while naturally revealing relationships between data.

Exploring data with Commerce applications

Oracle Endeca Commerce is based on the Oracle Endeca MDEX Engine, a powerful platform that stores data as records with accompanying properties.

About Endeca records and properties

Endeca records are the entities in a data set that a user must be able to find. Products in a merchandising application, data for individual customers in a Customer Relationship Management (CRM) application, and mutual funds in a fund evaluator are all examples of items that can be represented as Endeca records.

A record consists of multiple properties, which are data values specific to that record. A product record likely includes properties for the product name and price, as well as additional properties for other useful information. An end user typically sees these properties after selecting a specific record from their search or navigation results.

About dimensions and dimension values

Each Endeca record has one or more associated dimensions. A dimension is a label that classifies a record into a navigable category. For each dimension that a record is tagged with, it also has a corresponding dimension value. This can be a discrete value or a range with an upper and lower bound.

For example, a camera in an electronics store may be labeled with a "product category" dimension of value "camera." It could also have a "price range" label with a value that classifies its price as ranging from \$100-\$200. The actual price of the camera would be a record property rather than a dimension value, since customers are unlikely to navigate to a category for "cameras priced at exactly \$128 dollars."

Dimensions can be hierarchical; that is, a "wine type" dimension may contain values for "red" and "white" wines, and the "red" dimension value may itself contain "Merlot" and "Chianti" dimension values.

Dimensions form the core of the Guided Navigation experience, as they are the values an end user relies on to navigate through and refine a data set.

Example

For example, consider the following (partial) records from the Discover Electronics reference application dataset:

```
product.name="Zx1"  
product.brand = "Brand_A"  
product.price="1238.000000"  
product.review.avg_rating="1.600000"
```

```
product.name="Digital IXUS 85 IS"  
product.brand="Brand_B"  
product.price="102.000000"  
product.review.avg_rating="2.700000"
```

Each record represents a camera in an electronics store, and includes properties that contain data about that specific camera. Your application developer chooses how to assign dimensions to each record.

For the examples above, the `product.brand` value becomes the value of the "Brand" dimension, but the `product.price` and `product.review.avg_rating` values have to be converted into a corresponding range for "Price" and rounded down to a "Review Rating" category to make the application easy to navigate.

The "Zx1" camera is tagged with the **Price > Over 1000** dimension value, and the **Review Rating > 1** dimension value:

Your Selections

- Category: cameras
- Price: Over 1000
- Rating: 1
- [Clear All](#)

Showing 1 - 12 of 399 items

Display: 12 per page Sort By: Relevance

Zx1
 Zx1 3MP, 1/4.5: CMOS, 5.08 cm (2.0 ") LCD, 128MB, 90g
 ★★☆☆☆ Reviews(0)
 \$1,238.00
[Add to Cart](#)
[+ Add to wishlist](#)

EasyShare M320
 8818288, EasyShare M320 Digital Camera, 9.2 MP for prints up to 30 × 40 in. (76 × 102 cm), 3X optical zoom
 ★★☆☆☆ Reviews(0)
 \$1,426.00
[Add to Cart](#)
[+ Add to wishlist](#)

Narrow Your Results

Category

- [Camera Accessories & Supplies \(120\)](#)
- [Cameras \(154\)](#)

The "Digital IXUS 85 IS" camera is tagged with the **Price > 100 - 250** dimension value, and the **Review Rating > 2** dimension value:

Your Selections

- Category: cameras
- Price: 100 - 250
- Rating: 2
- [Clear All](#)

Showing 1 - 12 of 55 items

Display: 12 per page Sort By: Relevance

Digital IXUS 85 IS
 Digital IXUS 85 IS, silver, 10 Mpix, 3x zoom
 ★★☆☆☆ Reviews(0)
 \$102.00
[Add to Cart](#)
[+ Add to wishlist](#)

Lens EF50 1.4 USM ES-71 II 58mm
 Lens EF50 1.4 USM ES-71 II 58mm
 ★★☆☆☆ Reviews(0)
 \$234.00
[Add to Cart](#)
[+ Add to wishlist](#)

Narrow Your Results

Category

- [Camera Accessories & Supplies \(19\)](#)
- [Cameras \(18\)](#)

For in-depth information on the MDEX Engine and the data structures that make up an Oracle Endeca Commerce application, see the *Concepts Guide*.

Navigating data in an Endeca application

End users employ a combination of navigation and keyword search to naturally navigate to information that interests them. For example, a user can execute a keyword search query to retrieve a set of records, then use a follow-on navigation query to refine that set of records, or vice-versa. The set of search results and available navigation refinements is re-ranked and re-organized with each click, ensuring that the options displayed are as relevant as possible each step of the way.

The makeup of an Oracle Endeca Commerce implementation

An Oracle Endeca Commerce implementation consists of a back-end Endeca instance (the MDEX Engine and data pipeline), the Endeca application (the front-end cross-channel application), and the infrastructure hosting the components.

Your technical team builds out your implementation. They configure and manage the data pipeline that processes source data into records with associated dimensions and properties. The technical team also writes the code that handles and renders data to create a useable front-end application.

You, as the business user, manage the presentation of data by configuring where it displays and under which conditions. For example, you can define triggers to dynamically spotlight content, as described later in this guide.

What is Oracle Endeca Workbench?

Oracle Endeca Commerce includes Oracle Endeca Workbench, a Web-based tool that provides access to all the business functions that you perform.

Your Endeca administrator sets up Workbench for your use, including:

- Defining you as a user with specified privileges
- Setting up Workbench to communicate with your Endeca implementation

Typically, Workbench is configured for use with a staging version of your application. When you make your changes, you are likely making them to the staging implementation, not the production version. Your changes do not impact the live implementation until a technical team publishes them to the production environment.

Workbench distribution

How you use Workbench depends on the license and accompanying software package you have purchased. Oracle Endeca Commerce distributes Workbench in two packages: Oracle Endeca Guided Search and Oracle Endeca Experience Manager. The Guided Search package includes Rule Manager, while the Experience Manager package replaces Rule Manager with the more robust Experience Manager.

- In Oracle Endeca Guided Search, Workbench includes:
 - EAC Admin Console
 - Keyword Redirects
 - Report Scheduler
 - Reports
 - Rule Manager
 - Thesaurus
 - User Segments
- In Oracle Endeca Experience Manager, Workbench includes:
 - EAC Admin Console
 - Experience Manager
 - Keyword Redirects
 - Preview Settings
 - Report Scheduler
 - Reports

- Thesaurus
- User Segments

Logging in to Workbench

Your Endeca administrator should provide a user name and password for accessing Workbench.

To log in to Workbench:

1. Open a browser and access Workbench by supplying the URL provided by your administrator.
By default, the login URL is `http://<Host_Name>:8006`, where `<Host_Name>` is the machine running your Workbench installation.
You should see the Oracle Endeca Workbench login page.
2. Enter the **Username** and **Password** provided by your administrator.
3. Click **Log In**.



Note: Workbench may take several minutes to load if you are managing a large number of content items.

Logging out of Workbench

If you do not log out manually, Workbench logs you out automatically after a period of inactivity. The duration of the inactivity window is specified by your Endeca administrator.

To log out of Workbench:

1. Save any unsaved changes.
2. Click the **logout** link next to your user name in the upper-right corner of the screen.

Permissions in Workbench

Workbench includes several pages, each corresponding to a set of tasks. Permissions for these pages are set by your Endeca administrator.

Some pages include administrative functions, while others are intended for business users. Access to these pages is controlled through permissions. Your Endeca administrator may grant permission to some or all of the following pages:

- Rule Manager or Experience Manager
- Keyword Redirects
- Thesaurus
- Reports

Managing content items

A content item consists of two parts: records in a data set, stored in the MDEX Engine, and the associated trigger conditions that determine when those records display in your application.

Content items are the heart of the Content Spotlighting feature in an Assembler application. Content Spotlighting is the process of identifying and promoting contextually relevant records to users as they navigate or search within a data set.

The MDEX Engine compares each end user query to the content items in an application to determine if the query matches any existing triggers. If an end user's search query, navigation state, user segment, or environment (such as the date) matches a content item trigger, the MDEX Engine returns the corresponding records. These can include the following:

- Record results for a search query or navigation state
- Static records configured by a merchandising user (such as selected records in a Record Spotlight cartridge)

How content triggers shape the end user experience

Oracle Endeca Commerce applications are tailored to present contextually relevant content to the end user across all parts of the user's experience. You can use Workbench to trigger content based on an end user's individual characteristics, on their search queries and navigation selections within your application, or on external factors like date and time.

Taken together, the combination of an end user's search and navigation state, the user segment they belong to, and any other external factors that trigger content items (such as the user's geographic position or the current date) can be considered the user's "location."

When planning your Content Spotlighting strategy, it is useful to think of your application in terms of which location displays which content. For example:

- The main navigation sidebar and results list in your application page should remain fairly consistent. These should trigger by default.
- You may wish to display a seasonal banner image. This should be configured as four separate banners, one for each season, each with a date-driven trigger.
- You might display a "featured products" sidebar that displays the highest-rated results in an end user's currently selected category. You could configure this item to display anytime a user has a non-zero navigation state (that is, any time they have selected any category in the navigation sidebar), and to show records with a high "product rating" value within the user's current navigation state.
- You might display a "selected specials" sidebar that only triggers for a certain search or navigation state, such as when the user enters "specials" as a search query.

This overview is meant as a high-level introduction to how triggers drive the behavior of your application. For more detailed information, see "About controlling the display of content" in this guide.

About thesaurus entries

Thesaurus entries allow you to broaden application search results to account for alternate forms of an end user's search query.

Thesaurus entries provide concept-level mappings between words and phrases. For example, if users enter the search term "cab" to search for "Cabernet Sauvignon," you can create a thesaurus entry to equate "cab" with "Cabernet Sauvignon."

You can add two kinds of entries to the Thesaurus:

- One-way thesaurus entries map a search term to an equivalent term, but not the reverse. For example, a one-way mapping of "silver" to "metal" returns results for "silver" any time an end user's search query includes the word "metal." It does not include results for "metal" when a user searches for "silver."
- Multi-way thesaurus entries establish a mutual equivalence between words or phrases, so the two become interchangeable.

You might find it useful to examine reporting data for your application when creating thesaurus entries. If you find that users frequently search for a term you had not expected, you can create a form equivalence mapping in your thesaurus.

About keyword redirects

Keyword redirects are used to redirect a user's search to a URL. This URL can represent a static page in your application (such as an "About Us" page) or a specific search or navigation state.

A keyword redirect triggers on one or more specified search terms. If an end user enters the specified term or terms, the application redirects them to the specified location.

Your technical team must modify the application code to properly handle keyword redirects and display the specified Web page when a redirect triggers.

About Content Spotlighting

Content Spotlighting in an Assembler application is based off the end user's state in the application, rather than on static content that does not respond to changes in context.

Content Spotlighting in Oracle Endeca applications works differently from traditional content management systems (CMS), where you select an individual record for promotion, place it on a template or page, and then publish it to a Web site. Endeca merchandising is dynamic. When a user's query triggers a content item, the content item specifies contextually relevant records to promote to a multichannel application. In some cases, triggers specify how to promote records, but do not necessarily determine what those specific records are. For example, a "Featured Products" content item may return the top-rated products in the user's current category.

This means that as users navigate or search, they continue to see relevant results because appropriate content triggers are in place. Even when the data set itself is updated and the records are altered, existing content items can continue to return relevant records. The trigger conditions remain the same, even though the promoted records may change.

Comparing typical CMS scenarios with Content Spotlighting

Instead of manually configuring static promotions, you can use content items to dynamically generate relevant promotions from your source data.

In a traditional CMS scenario, if Wine A is "recommended," it is identified as such and published onto a static page. If you need to update the list of recommended wines to remove Wine A and add Wine B to the static page, you must manually remove Wine A, add Wine B, and publish the changes. With Endeca Content Spotlighting, the effect is much broader and requires much less maintenance. You can create a content item that promotes wines with a "recommended" value, and design the search results page to include that content item when available.

In this scenario, the recommended Wine A is promoted any time the trigger conditions for the content item are met, and the content item is included in the user's current page. Additionally, updating the spotlight to remove Wine A and add Wine B requires updating the source data to reflect that Wine B is now tagged as "recommended." In this way, the application remains accurately data-driven.

After making the change, Wine B is promoted on any number of pages that specify recommended wines in the result set, without adjusting or modifying the content item triggers or the page layout.

Support for static spotlighting

Content Spotlighting provides the ability to specify featured records. When a user's location triggers a content item that specifies a featured record, that record is returned in addition to the normal search query or Guided Navigation results.

In addition to using content triggers to implement dynamic spotlights, Oracle Endeca Commerce provides support for static spotlighting in the more traditional CMS sense.

You can configure a content item to return a combination of featured static records, featured dynamic records, and a record list of dynamically generated results.

Typical merchandising uses

This section contains some typical merchandising scenarios. These examples use the Discover Electronics reference application to demonstrate how various cartridge configurations can fulfill strategies for promoting featured records. The configuration described in each example is not included in the reference application by default, though you may choose to reproduce it.

Dynamically promoting highly rated results

In this up-sell scenario, the strategy is to promote results that have been highly rated, and return a dynamically generated set of records that also take into account the user's location in the data set.

The content item for accomplishing this has the following configuration:

The screenshot shows the configuration interface for a content item titled "Category Spotlights > Top Rated Products". The interface is divided into two main sections: "MainContent Summary" and "Content Editor".

MainContent Summary:

- Name:** Top Rated Products (with "Active" and "Deactivate" status indicators).
- Location:** Applies at all locations (with an "Add Location" button).
- Template:** HorizontalRecordSpotlight (with a "Select Template" button).
- Actions:** Select User Segments (person icon) and Select Time (clock icon).

Content Editor (XML View):

Section Settings:

- Section Type:** MainContent
- Cartridge:** HorizontalRecordSpotlight (with a "Change" button and a red "x" icon).
- Name:** Top Rated Products

Define Spotlight:

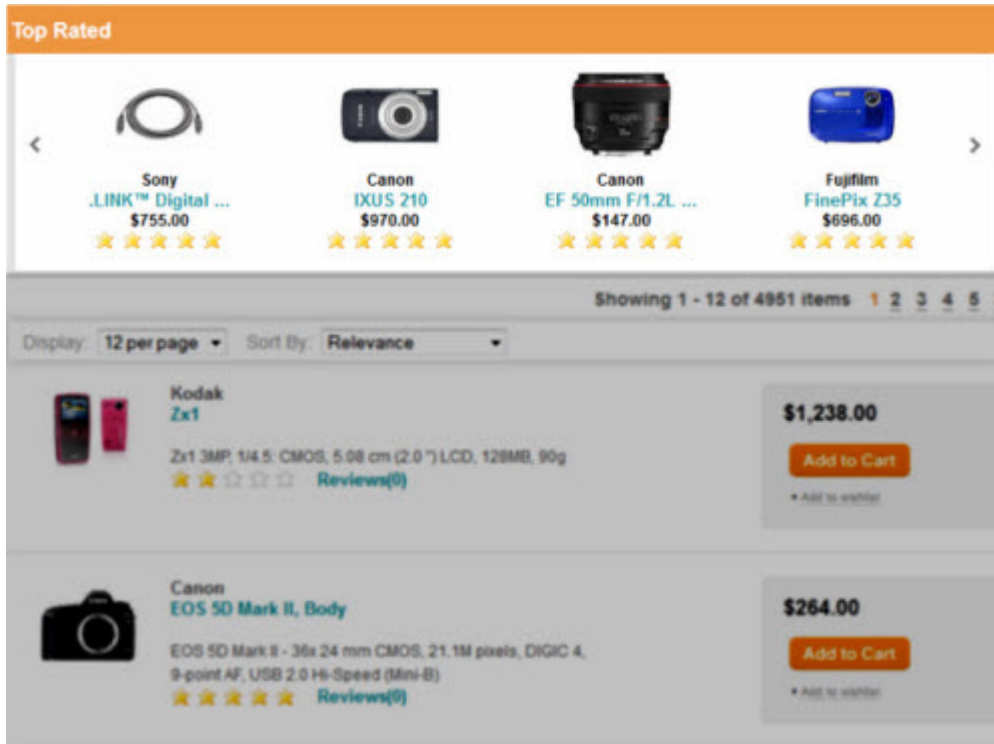
- Spotlight Title:** Top Rated
- Max Number Of Records:** 10
- Spotlight Records:**
 - ☐ Specific records
 - ☒ Records selected by query
 - Query: `product.review.avg_rating_range: 5`

- It is configured as a Horizontal Record Spotlight cartridge that fills a corresponding slot in the "Default Guided Navigation Page" content item.
- It has the display title "Top Rated Products."
- It has a **Location** trigger that allows it to display at any location in the data set where there isn't a higher priority content item in the same slot; in other words, it always triggers, regardless of the user's location.

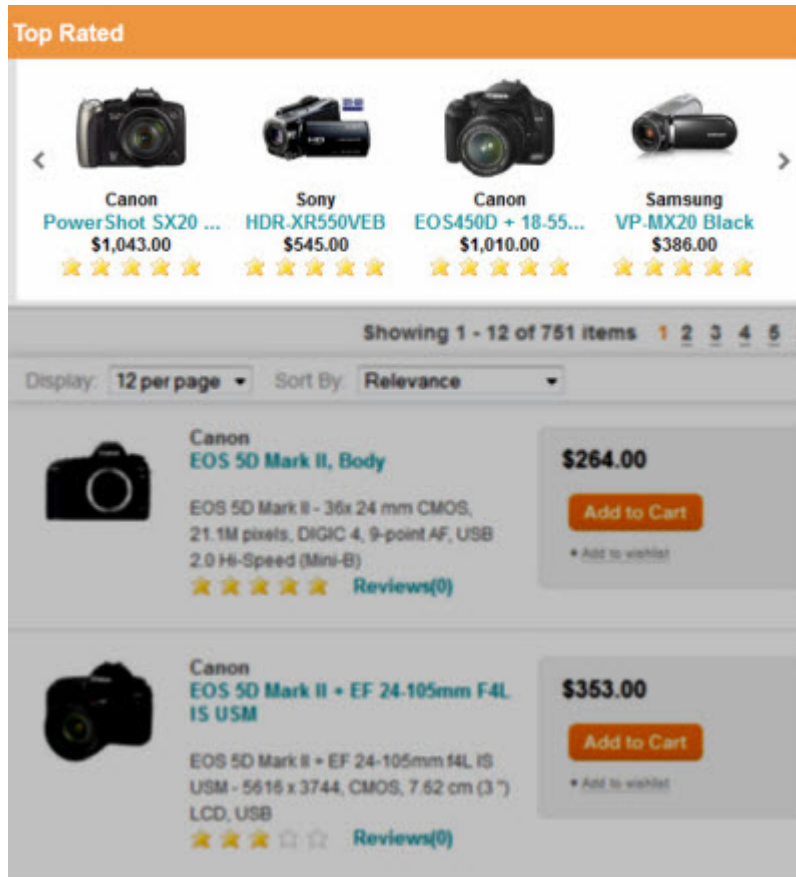
- It spotlights records based on a `product.review.avg_rating_range` value of 5 in the data set, indicating a high review score. Whenever the data is updated, the content item automatically returns the new records, without requiring changes to its cartridge configuration.

As a user searches or browses, the content item returns results with a high review rating. Any navigation state triggers the spotlight, because it triggers at all locations.

If a user navigates to the "Cameras" category, the application displays the regular navigation results, as well as 10 spotlighted records in the horizontal spotlight:



Because the trigger is restricted to the active navigation state, the results vary depending on the user's navigation location. For example, instead of navigating to **Category > Cameras**, suppose a user navigates to products that are black and feature manual focus. The MDEX Engine returns a different set of dynamically generated results for the Top Rated Products spotlight:



Promote a related category based on user location

In this cross-sell scenario, the strategy is to promote results in a category that is similar to the one a user is currently browsing. In this example, when a user selects the **Features > Auto Focus** dimension value, a spotlight displays results that also include the Auto Focus (AF) Assist Beam feature.

The content item for accomplishing this has the following configuration:

Category Spotlights > AF Assist Beam

▼ MainContent Summary

Name ✓ Active Deactivate

Location + Add Location

Template HorizontalRecordSpotlight Select Template

Select User Segments Select Time

Content Editor XML View

Section Settings

Section Type MainContent

Cartridge HorizontalRecordSpotlight x Change

Name

Define Spotlight

Spotlight Title

Max Number Of Records

Spotlight Records ☐ Specific records ☒ Records selected by query

Record limit: 4

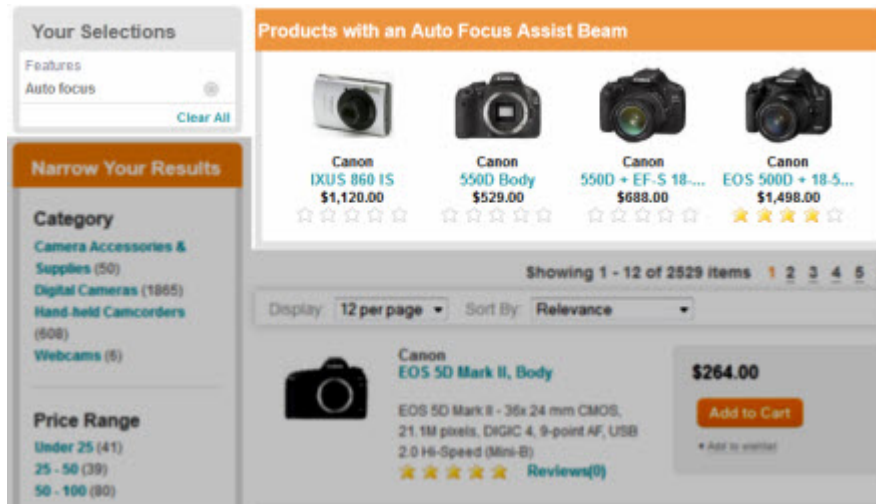
Edit Query

☒ Restrict to active refinements

Maximum Number of Records: ☐ No limit ☒ 4

- It is configured as a Horizontal Record Spotlight cartridge that fills a corresponding slot in the "Default Guided Navigation Page" content item.
- It has the display title "Products with an Auto Focus Assist Beam"
- It has a **Location** trigger that activates the content item when a user navigates to **Features > Auto Focus**.
- It spotlights records within the `product.features>Auto Focus (AF) assist beam` dimension value.
- It restricts spotlighted records to the current navigation state, so that they match any additional refinements the user has selected.

If a user navigates to **Features > Auto Focus**, the application displays the regular navigation results, as well as the spotlight for records for products with an Auto Focus Assist Beam:



Promote a related category based on a search term

In this cross-sell scenario, the strategy is to promote results in a category that is linked to a user's search query. In this example, a spotlight displays camera cases when a user searches for "camera."

The content item for accomplishing this has the following configuration:

Category Spotlights > Spotlight - Camera Cases

▼ MainContent Summary

Name

Spotlight - Camera Cases

✓ Active Deactivate

Location

🔍 Search Term: camera ✕

+ Add Location

Template

HorizontalRecordSpotlight

Select Template

👤 Select User Segments

🕒 Select Time

Content Editor

XML View

Section Settings

Section Type

MainContent

Cartridge

HorizontalRecordSpotlight ✕

Change

Name

Spotlight - Camera Cases

Define Spotlight

Spotlight Title

Don't forget a case!

Max Number Of Records

10

Spotlight Records

☐ Specific records
 ☒ Records selected by query

product.category: bags & cases

Edit Query

☐ Restrict to active refinements

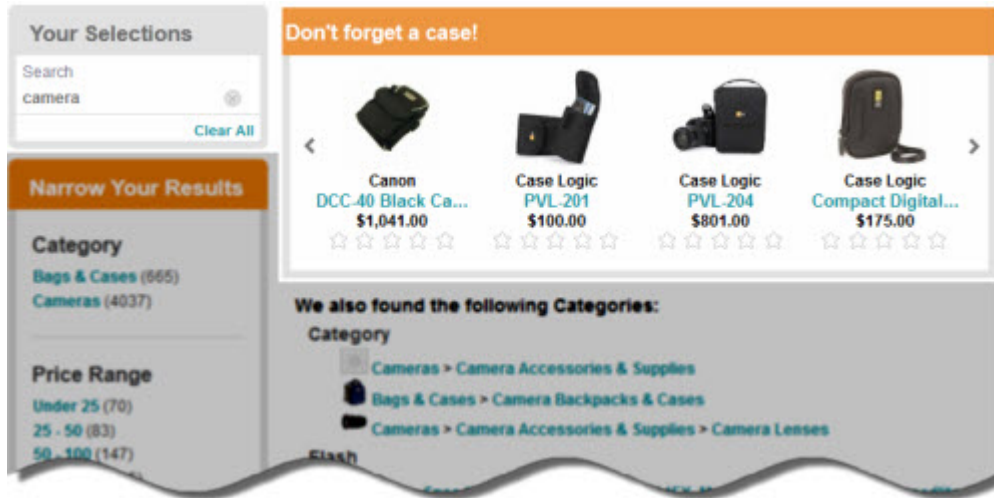
Maximum Number of Records:

☒ No limit
 ☐ 1

- It is configured as a Horizontal Record Spotlight cartridge that fills a corresponding slot in the "Default Guided Navigation Page" content item.
- It has the display title "Don't Forget a Case!"
- It has a **Location** trigger of "Search Term: cameras" with a "Match Exact" match mode. This activates the content item when a user searches for "camera," with no additional search terms.
- It spotlights records within the `product.category>bags & cases` dimension value.

If a user searches for "camera," the application displays the regular navigation results and displays records for camera cases in the "Don't Forget a Case!" spotlight.

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Promote specific featured results

In this featured results scenario, the strategy is to promote three specific cameras as featured results when a user navigates to the "cameras" category in the month of January.

The content item for accomplishing this has the following configuration:

Category Spotlights > January Specials

▼ MainContent Summary

Name: January Specials Active Deactivate

Location: product.category > cameras ✗ + Add Location

Template: HorizontalRecordSpotlight Select Template

Select User Segments Select Time Start: 01/01/2013 12:00 AM End: 01/31/2013 11:59 AM

Content Editor XML View

Section Settings

Section Type: MainContent

Cartridge: HorizontalRecordSpotlight ✗ Change

Name: January Specials

Define Spotlight

Spotlight Title: January Specials

Max Number Of Records: 10

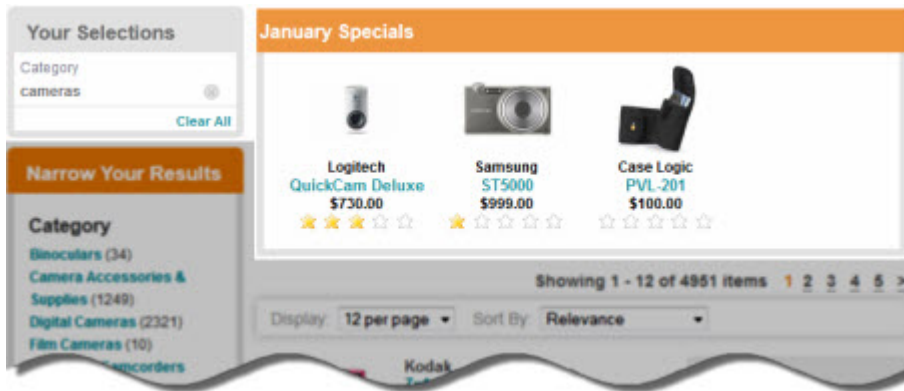
Spotlight Records: ☒ Specific records ☐ Records selected by query

1000784
4148937
4150294

- It is configured as a Horizontal Record Spotlight cartridge that fills a corresponding slot in the "Default Guided Navigation Page" content item.
- It has the display title "January Specials"

- It has a **Location** trigger that activates the content item when a user navigates to **Category > Cameras**.
- It has a **Time** trigger spanning from midnight January 1, 2013 to midnight on January 31, 2013. This activates the content item when a user browses the site during the month of January.
- It spotlights three specific records. The order in which these results are added dictates the order in which they appear in the content item.

If a user navigates to **Category > Cameras** during January, the application displays the regular navigation results, as well as the spotlight for records:



Viewing reports

Reports display information that helps you interpret what has happened on your site in the past day or week.

Your technical team defines which data to generate reports for, and how often to generate those reports.

Depending on how reporting is configured, reports can help you answer questions like the following:

- How much traffic is my site getting?
- How are visitors searching and browsing the site?
- How effective are their searching and browsing techniques?

The Reports page can display a single daily or weekly report or allow you to browse and view archived reports.

Chapter 2

Content Spotlighting with Experience Manager

This section provides a comprehensive walkthrough of creating rich, data-driven content with the Oracle Endeca Experience Manager.

About Experience Manager

Oracle Endeca Experience Manager is a powerful spotlighting tool that enables rapid creation of dynamic content. Experience Manager gives merchandisers unprecedented control over site content without the need for IT intervention.

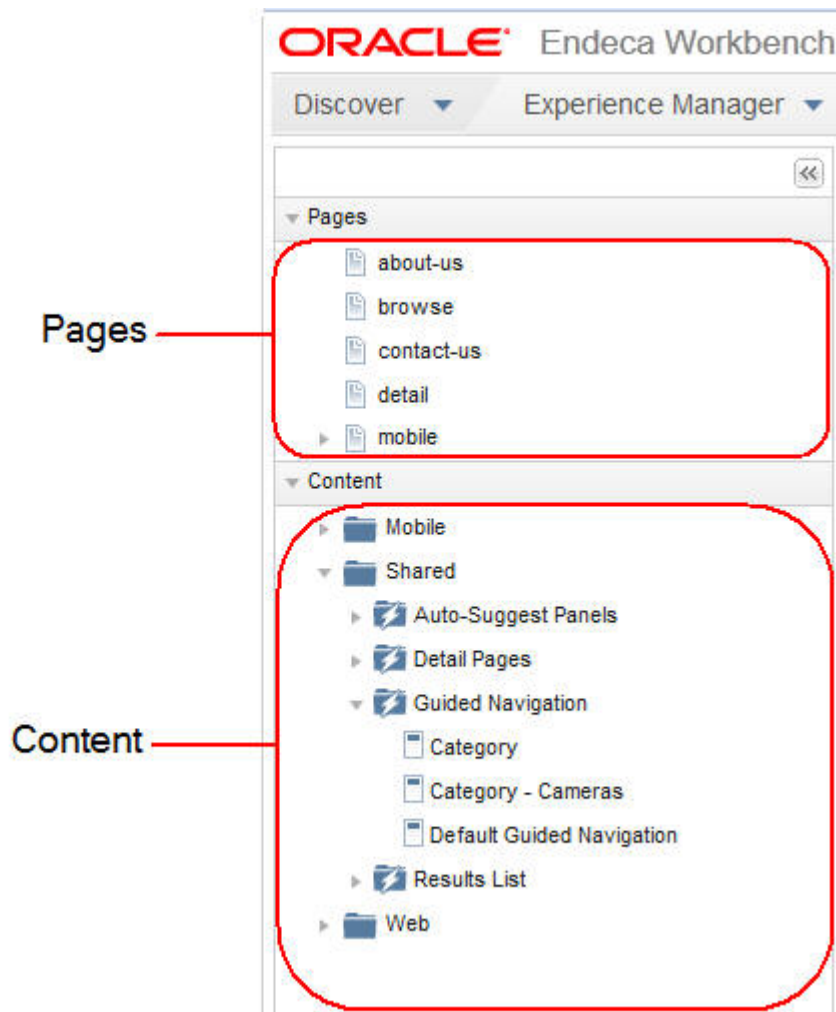
With Experience Manager, merchandisers and other business users work from custom templates and content collections to create data-driven pages easily. Experience Manager lets merchandisers manage the placement and display of dimensions, promotions, rich media, and other forms of content spotlighting. Content can be used in any number of locations across a site, decreasing the time and effort normally associated with creating and maintaining content. Experience Manager presents the most relevant content to visitors at each step of the online experience based on their searches and site navigation.

Pages and content

On the left side of Experience Manager is the navigation tree. This tree contains the building blocks for creating your content. The navigation tree is divided into a **Pages** section and a **Content** section. The main difference between pages and content is that pages are always available via URLs, while content only displays under specific conditions.

Pages are the basic containers that display all of your dynamic content. Your development team provides templates so you can create URL-accessible pages in a variety of layouts suitable for browsing, displaying detail, or simply presenting about-us or contact pages.

The Content section contains all the dynamic content that you use to dynamically populate your pages. The items in this section are the key components for featuring and spotlighting records on your pages. Your development team provides mini-templates or *cartridges* for plugging this content into page sections. You can organize the **Content** section into folders. For example, you can create separate folders for Web or mobile content, and another folder for content that you share across content delivery devices.









Note: The folders that you create can have names up to 50 characters long.

When you click any of the items in the Content or Pages sections of the navigation tree, the items open in the right panel. The right panel is where you configure how records displays.

About icons in Experience Manager

Use the following key to identify components in the Oracle Endeca Experience Manager interface.

Icon	Component
	Page
	Folder
	Content collection

Icon	Component
	Content item
	Section
	Cartridge

About using pages in Experience Manager

As you create content with Experience Manager, you will be working with the familiar URL-accessible page as well as the dynamic page.

URL-accessible pages have static URLs that are specified when you create the pages. These pages are what you see in the **Pages** section in the left navigation of Experience Manager. URL-accessible pages always display when you enter the URL and no conditions have to be met before a page displays. These pages are containers for featuring content. One type of content is the dynamic page.

Dynamic pages do not have static URLs, but they can display their content in URL-accessible pages that point to them. Dynamic pages only display content when one or more conditions have been met: when you want a specific set of visitors to find it, when a specific set of search terms are associated with it, or if you want content to display at a specific date and time. You can see your site's dynamic pages in the **Content** section in the left navigation of Experience Manager.

Creating a page

You can create a URL-accessible page from the **Pages** navigation of Oracle Endeca Experience Manager.

To create a page:

1. In the **Pages** navigation in Experience Manager, hover over the **Actions** icon, and click **Add Page** to create a URL-accessible page.
The **Add Page** dialog displays.
2. In the **Name/URL** text box, specify a name for your new page, and then click **Create**.
The name you enter becomes part of the URL for the page.
3. Click **Select Template**.
The Select Template dialog displays the templates that your development team created for your application.
4. Select a template appropriate for the page that you are building and click **OK**.
If you want to build a dynamic page and set conditions under which the page displays, select a dynamic slot page template. If you want to build a page that is always accessible but where the page sections display dynamically, choose another type.
5. Click **Save Changes**.

Next, you can create content items and content collections to populate your page.

Overview of creating a content item

With the Oracle Endeca Experience Manager, you create a content item, choose a template, and designate content for each section. You can specify when and where it is displayed.

The following describes the process for creating a content item with Experience Manager:

1. In the **Content** navigation in Experience Manager, select the content collection in which you want to create the content item.
2. Configure the content item:
 - Choose a template.
 - Set a location for your content item.
 - Specify active dates and times (optional).
 - Select a **User Segment** to restrict who sees your dynamic page (optional).
 - For each section, select and configure cartridges.
3. Activate and save the content item.
4. Set the priority of the content item within the content collection.

Creating content items

This section describes how to create a content item, choose a template, and add the item to a collection.

About content items and content collections

You can use content items and content collections to define what content can display in your application whether it displays on a page or in a section of a page.

Content items

A content item describes the logic of how to promote content for display to application users. Content items implement merchandising and content spotlighting features. Merchandising and spotlighting content is a process of identifying and promoting contextually relevant records to visitors as they navigate or search within a catalog.

Content items have several parts: the records in a data set, the conditions that must be met for those records to display, and the templates that determine how those records are rendered in the application. In short, the content item describes triggers as well as results. Dynamic pages and page sections are examples of content items. You can use content items to configure pages or sections to show global promotions, or to limit the display of featured products and categories to contextually relevant suggestions.

Content collections

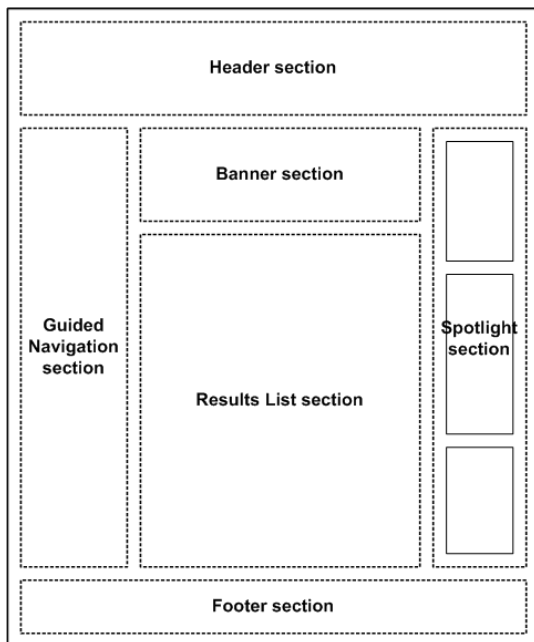
A content collection is composed of one or more nested content items. Each content collection includes a restriction on the type of content that can be defined within it. For example, if you want to create a content collection for product spotlighting, you might restrict the collection to only allow `SecondaryContent` type of cartridges. Each product spotlighting item in the content collection has conditions that determine when that item displays records. When you configure the section that gets dynamically populated by the content collection, you select a dynamic slot cartridge to reference the

product spotlighting collection. Dynamic slots let you populate content in the section based on triggers in the collection independent of the page triggers.

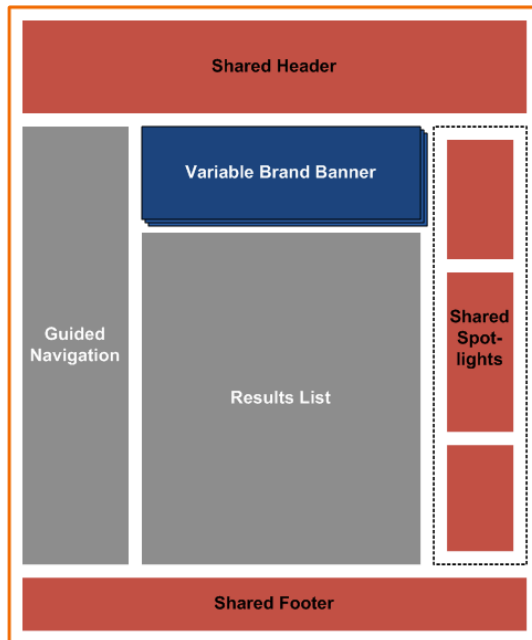
Content collections can be created in the left navigation tree either at the root of the **Content** section or inside a folder. A content collection can only contain content items; it cannot contain other content collections or folders.

Content collections example

Suppose you have an application where a typical structure for a search and navigation page looks like the following template:

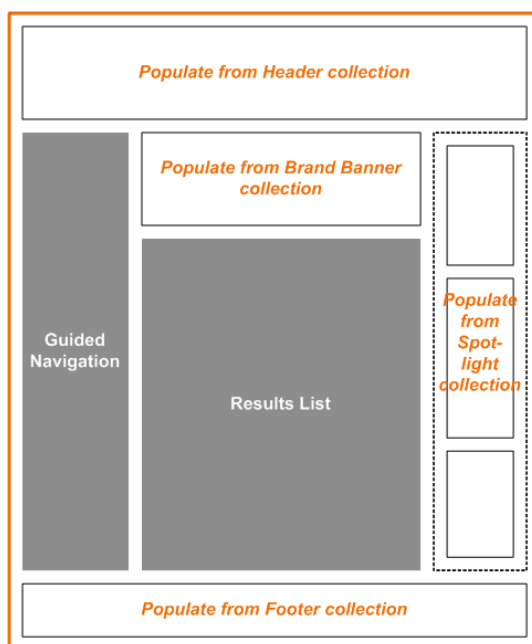


Based on this template, you want to configure a page for a specific trigger using contextual, shared, and variable content, for example, Category > Cameras > Digital Cameras.



- The header and footer are populated from a content collection to avoid defining them multiple times for a large number of pages.
- The Guided Navigation and Results List cartridges are configured specifically for this page and do not need to vary based on criteria other than the page triggers.
- The Banner area is configured to display a different image depending on the brand that the visitor selects.
- The Spotlight area displays a mix of promotions based on triggers that are independent of the triggering criteria for the page itself. For example, a "Holiday Specials" spotlight might display for the date range between November 1 and January 2.

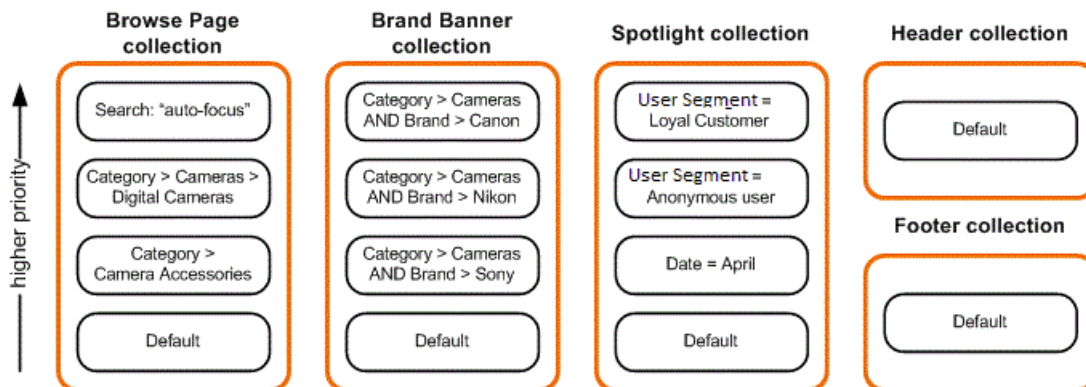
The configuration for the page looks like this picture:



The configuration for Guided Navigation, including which dimensions to display and which dimension values to boost or bury within those dimensions, and for the Results List, including default sort options and record boost and bury, are specified as part of the page configuration. The other sections of the page only contain placeholders. The actual Header, Footer, Banner, and Spotlight content items that display when someone visits the site are defined in their respective content collections.

The mechanism for populating these page sections is the same regardless of whether the content that should display in each section is shared or variable content. The only difference between the two kinds of content is in the trigger criteria in the content items within the collections. Variable content, such as the Spotlight, has triggers that are more specific than the page trigger. Reusable content, such as the generic header and footer, has triggers that are more general than the page trigger.

When you create all the content needed to populate this page and other pages, the application might include the following content items in the following collections:

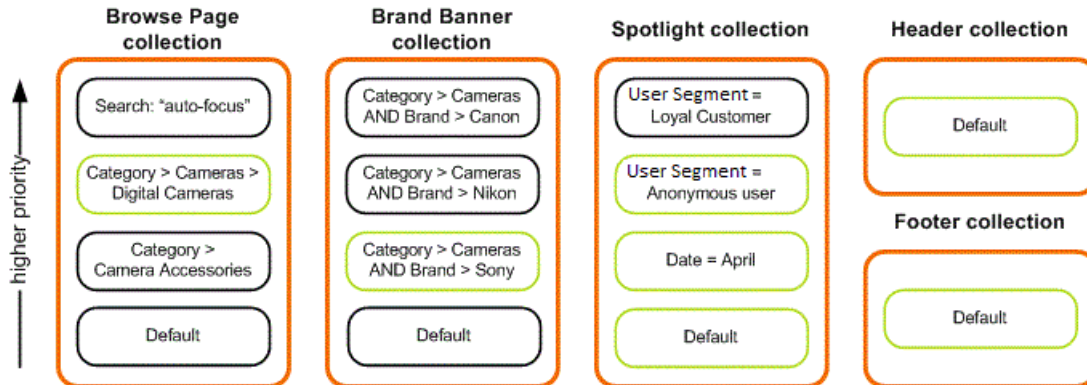


The collections are configured in the following ways:

- The Browse Page collection contains all the content items representing search and navigation pages in the site. Because only one page can display to a user for any given query, the evaluation limit is 1.
- The Brand Banner collection contains cartridges of type `MediumBanner` that are appropriate to display in the Banner section. This collection also has an evaluation limit of 1 because the page is designed to display only one banner at a time.
- The Spotlight collection contains cartridges of type `SidebarItem` because items created in this collection are intended to display in the Spotlight slot in the right column. Because this space is intended to display several independently triggered spotlight items, the evaluation limit for this collection is 3.
- The Header and Footer collections each contain cartridges of type `FullWidthContent`. The evaluation limit for these collections is also 1.

Each page or content item within these collections has an associated trigger and priority that you specify.

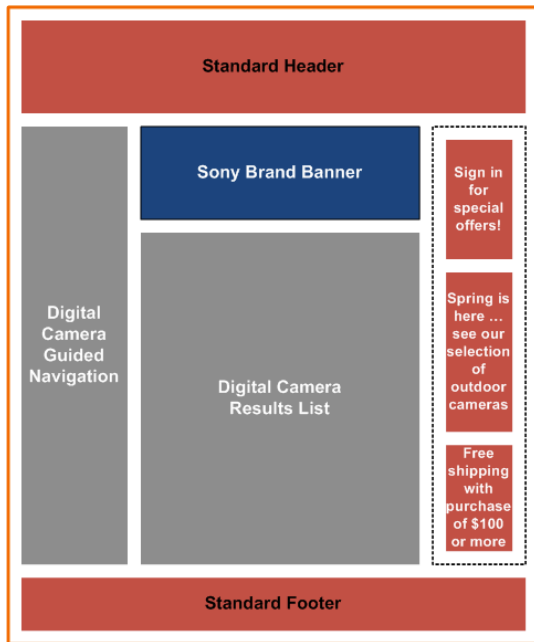
When a visitor refines on Category > Cameras > Digital Cameras and Brand > Sony, the following content displays. Green indicates that the content item has fired.



- The Digital Cameras page is returned from the Browse Page collection, which includes your configuration for Guided Navigation and for Results List. The Default page, containing a trigger of Applies at all locations, can also fire, but the Browse Page collection is limited to one content item and the Digital Cameras page has a higher priority, therefore it takes precedence and the Default page does not fire.
- The Banner slot is populated by the highest priority content item that matches the user's navigation state in the Brand Banner collection. In this case, it is the Sony cameras banner. Again, there is a Default banner but it does not fire because it has a lower priority.
- The Spotlight slot is populated by the highest priority content items that match the visitor's navigation state in the Spotlight collection. In this case, the Default spotlight does fire because there is room for three spotlights in this slot and that item has a high enough priority to be included. These three content items display in the Spotlight area in order of priority.
- The Header and Footer collections have only one content item each, which is set to display at all locations, therefore the same content is returned for this page as for all pages.

In this example, content is returned from five content collections including the Browse Page collection. Priority between items is specified within each collection. It does not make sense to prioritize the Sony cameras banner against the April spotlight cartridge, for example, because they are not competing against each other to be displayed on the page. In general, content items with more specific trigger criteria should have a higher priority than those with more general criteria, especially if a content collection has an evaluation limit of 1.

The final result for the site visitor who is looking at Sony cameras looks like the following picture:



Components of content items

Templates, sections, and cartridges are the core components of the content items that you create.

Templates

Templates define overall layout and style for a content item. In general, templates are created by developers to reflect samples designed by the creative team. The team creates templates for pages and sections of pages. The resulting documents are uploaded into Oracle Endeca Rule Manager or Experience Manager and serve as a framework for you to build upon and customize.

Sections

Templates contain sections that serve as placeholders for the display of products, dimensions, promotions, rich media, and other forms of content. Developers configure each section to accept certain types of content in the form of a cartridge.

Cartridges

Cartridges are essentially mini-templates that you plug into sections and then configure to contain the content you want to display on your page. Each cartridge might have several fields to configure, and might contain additional cartridges. Depending on the cartridge you have selected, you might be asked to specify a path to an image or flash file, a title, rollover text, or additional cartridges. The simplest cartridges might need no configuration.


Templates and cartridges are custom-built by developers, so each might have a unique set of options for configuration.

Creating a content item

You can create a content item in a content collection.

Content items determine the content that displays in a page or page section as well as any conditions that must be met before the content displays. Your application can reference the content item directly or dynamically by referencing the content collection that contains the item.

To create a content item:

1. To create a content item: In the **Content** navigation, hover the mouse pointer over the content collection and click the **Actions** icon , and select **Add Content Item**.
Alternatively, you can click the content collection, and then click **New...** at the top of the collection list page.
2. In the **Name** text box, specify a name for your new content item.
3. Click **Save Changes**.

You still need to choose a template, determine when and where the content displays, and designate content.

Choosing a template

Templates are the starting point for building your content items.

To choose a template for a content item, or to change the template for an existing one:

1. Click the content item that you want to edit in the **Content** navigation.
2. Click **Select Template**.
The **Select Template** dialog displays.
3. From the **Select Template** menu choose a template appropriate for your content item.



Caution: If you change the template for an existing content item, any content configured prior to the change is lost.

4. Click **OK**.
5. Click **Save Changes**.

Next, you can choose cartridges and designate content for each section in your template.

About configuring sections

Templates consist of configurable sections that serve as placeholders for the display of dimensions, promotions, rich media, and other forms of content. Typically, these sections are empty until you designate content items for them.

About dynamic slots

Dynamic slots allow you to manage and trigger different sections of a page independently from the rest of the page.

You can use a dynamic slot to control a page or page section and configure the slot to reference a content collection. The dynamic slot is associated with a content collection rather than a single content item. The content collection contains multiple content items, each with its own triggers and content.

The dynamic slot dynamically populates the page or section based on the triggers and priority of the content items within the collection.

Using dynamic slots in page sections

A page section can have multiple cartridges, but most cartridges can only point to a single content item. The exception is the dynamic slot cartridge. Page sections can display content using a different set of triggers from those used in the rest of the page. In this way dynamic slot sections are like dynamic mini-pages. See *About controlling the display of content* for more information on triggers.

Use a dynamic slot cartridge when you want to:

- Reuse content.

Once a set of conditions has been created to manage a specific page section, dynamic slots let you share the page section across multiple pages.

- Vary your content.

Page sections can display using a different set of triggers from those used in the rest of the page.

- Limit access to content items.

When different sections of a page are managed in separate content collections, a business user can make changes to just the triggers within a single content collection and update all pages that reference that collection. The business user does not need access to the individual pages in order to update them.

Example uses of dynamic slots

Use dynamic slots for the following activities:


- Control the brand banner images that display throughout the site.
- Specify the images that display at a particular navigation state (for example, Digital Cameras > Kodak) even if there is no specific landing page for that navigation state.
- Display promotions in the menu area based on more specific trigger criteria than those that apply to the page as a whole. For example, you could create a page to use as a base for all "Digital Cameras" pages, and populate the menu sections with more specific content based on the brand, price range, or other dimensions.
- Display promotions in the menu area based on trigger criteria that are simply different from those on the page as a whole. For example, there might be a "Back to School" special for a particular time frame that applies to all pages within a category or even the entire site. This model lets you reuse content for individual sections across a variety of pages. The reusable sections are managed in a central location so that updates immediately take effect across all the pages that include the reused content. You do not need to edit each one manually.

Creating a content collection

You can create content collections to manage the content within dynamic slots.

A content collection is composed of one or more nested content items of the same type. You create the content collection and then add content items. The dynamic slot references the content collection, and uses the triggers defined in the items to determine the content to display.

To add a content collection:

1. Hover the mouse pointer over a folder or the **Content** heading in the left navigation, click the **Actions** icon , and then select **Add Collection**.
The **Add Content Collection** dialog displays.
2. Enter a **Name**.
Enter a name that describes the page or section where the content is likely to be used, for example, `Guided Navigation Or Detail Pages`.
3. Select a content type from the **Content Type Allowed** drop-down list.
Your collection is limited to content items of this type.
4. Select how many content items that are evaluated in **Evaluation Limit**.
For example, if an **Evaluation Limit** is set to two, then after two content items have been evaluated successfully, no additional items are evaluated.
5. Click **Add**.

The content collection displays in the **Content** section in the left navigation. You still have to add one or more content items and add a dynamic slot cartridge to your application.

Creating a dynamic slot

You can create a dynamic slot for page sections.

Dynamic slot cartridges control content in a page or a page section such as a sidebar. The dynamic slot populates the section with content using a different set of triggers from those used in the rest of the page. You configure the slot to reference a content collection.

1. In the **Content** navigation, click the content item where you want to add the dynamic slot.
2. Identify the page section you need to configure by using the navigation tree in the **Content Editor** and open it for editing.
3. Click **Add**.
The **Select Cartridge** dialog displays.
4. Choose a dynamic cartridge from the list.
5. From the **Content Collection** drop-down list, select the collection that you want to dynamically display.
Only collections that are appropriate for that section display in the list.
6. Click **Save Changes**.

About applying one content item to multiple locations

Typically, there will be many locations deep within your catalog that do not have, or do not need, highly specialized dynamic experiences. These lower-traffic locations can still benefit from a common, stylized design and data-driven content and product spotlighting.

These deep low-traffic locations are called "long tails" because they represent the tail of a demand curve. While the more popular, high-traffic locations tend to see higher conversion rates individually, the long tails of catalogs have been shown to be worth more collectively. Because of this, creating dynamic experiences to cover the long tail products of your catalog can significantly boost overall conversion rates for your Web site.

You can create one content item, populate it with dynamic cartridges, and apply it to many different locations in your application. This simultaneously decreases the investment of time and effort, and increases the value of each of the long tails.

For example, you realize that your television category is performing poorly, and you decide to address the issue by creating a dynamic experience to help guide customers to the right television. It would take an enormous amount of time and effort to individually create unique content items for every possible location in a category, so instead you choose to create a single content item that will update and adjust as a user navigates through the application.

For this new content item, you choose a cartridge called "BestSellers." You click **Select Records** to choose products for that cartridge, but instead of selecting records by ID, you want to populate the cartridge with a dynamic set of records that will update and adjust as the user navigates through the application. In order to do that, you select the **Dynamic Records** option from the **Select Records** dialog box, and then choose refinements:

- Select the refinement Televisions > Best Sellers
- Select the **Restrict to Refinement State** checkbox

By restricting the results to the user's refinement state, you create a product spotlight that updates with relevant results every time a user navigates to a new location. This means that when the user is at Televisions > HDTV, the products that display in the spotlight are best-selling HDTVs. Then, if the user navigates to Televisions > HDTV > Sony, the products that display in the spotlight are best-selling Sony HDTVs.

By populating a content item dynamically instead of using static content, you create a relevant, engaging experience for all of the locations in your television category.



Note: You can only choose refinements that exist in your application. If your application developer has not defined the refinement set "Best Sellers," it does not display as an option.

Controlling the display of content

This section describes triggers and how to use them to control the display of content.

About controlling the display of content

Content only displays in your application if a specified set of search and navigation conditions exist in the content item. These conditions are known as triggers.

Once you have created a content item, you can set it to display content at a specific location in your application. The location is defined by a particular set of refinements or search terms that trigger the content to display.

There are also triggers to control who sees the content, as well as triggers to specify the times and dates when content is active.

By default, a new content item has no trigger until you add one. You can choose not to add any specific location and instead allow the content to display at every location in your Web application. This means that relevant content displays with any query a user makes—with any search term or refinement state. It also means that anyone can see it, and it is not constrained by a time frame.

If you choose not to add any locations to your content item, assign it a low priority. If you don't assign it a low priority, it will take precedence over content items in the content collection that are designed specifically for certain locations and prevent them from displaying.

Refinement trigger

A collection of one or more refinements can trigger content if a user navigates to a location that contains those refinement states.

For example, if your location is set to trigger on the refinement state Cameras > Digital Cameras > Canon, and a user navigates to Cameras > Digital Cameras and then to Canon, your content displays. The content does not display if the user only navigates to Cameras > Digital Cameras.

Search term trigger

One or more search terms can trigger content to display if a user's query includes the terms. You can specify one or more search terms and the match mode for the search terms. While you can only specify one search term or search term phrase per location, you can specify several locations for a single content item.

For example, if your location is set to trigger on the search term "Kodak," and a user searches for "Kodak," your content displays.

Combination triggers

You can specify both a search term trigger and a refinement trigger for a content item. If a location contains both a search term and a refinement state, both sets of criteria must be met in order for the content to display.

For example, if your location is set to trigger on the refinement state Cameras > Digital Cameras and the search term "Ricoh," a user must search for the term "Ricoh" from the Cameras > Digital Cameras refinement state in order for the content to display.

User segment triggers

You can control who sees your content by associating the content item with a user segment. User segments enable Oracle Endeca applications to display content to an end user based on that user's identity.

For example, if you have a "Free Shipping" promotion but only "Members" are eligible, you would select the "Members" segment so that users identified as non-members would never see the promotion.

Date and time triggers

If you create a content item and only want it to run within a specific time frame, you can trigger it to display content only during that time frame by specifying start and end dates as well as start and end times. Only during the active dates will the content display to end users in the application.

For example, if you create a content item for a Digital Camera promotion that only runs between April 3 and May 6, you can set the promotion to automatically activate and deactivate on those dates.

Triggering based on search terms

You can set a content item to display when a user searches for specific terms.

For example, if you create a dynamic page for Canon cameras, you might want it to display when a user searches for the term "Canon." You can accomplish this by setting the term "Canon" as a search term trigger.

To trigger based on a search term:

1. Click the content item that you want to edit in the **Content** navigation.
2. Click **Add Location**.
The **Add/Modify Location** dialog box displays.
3. In the **Search Term** text box, type a search term or phrase.
4. Select a match mode from the drop-down list:
 - In **Match Phrase** mode (the default), all of the words in the user's query must match in the same order as the search term location for the content item to display.
 - In **Match All** mode, all of the words of the user's query must match (without regard for order) the search term location for the content item to display.
 - In **Match Exact** mode, all the words of the user's query must exactly match a the search term location for the content item to display. Unlike the other two modes, a user's query must exactly match the search term location in the number of words and cannot include any extra words.
5. Click **Set** to copy the search term location to the **Search Term** list.

The screenshot shows the 'Add/Modify Location' dialog box. At the top, there are two radio buttons: 'Choose a location' (selected) and 'Make this the site's home page'. Below this is a section with a 'Search Term' text box containing 'canon'. To the right of the text box is a checkbox labeled 'At this exact location' which is unchecked. Below the text box is a dropdown menu showing 'Match Phrase'. To the right of the dropdown is a 'Set' button. To the right of the 'Set' button is a list titled 'Search Term' which contains the entry 'canon' with a red 'x' next to it.

6. Click **OK**.
7. Click **Save Changes**.

To specify multiple search term locations, repeat the previous steps. To add a refinement trigger, follow the steps for triggering based on refinements.

Triggering based on refinements

You can set a content item to display when a user navigates to a specific set of refinements in your application.

For example, if you create a content item for Canon cameras, you might want it to display when a user navigates to Cameras > Digital Cameras > Canon. You can set the content to display at that location by specifying a trigger based on the refinement state Cameras > Digital Cameras > Canon.

To trigger based on a refinement state:

1. Click the content item that you want to edit in the **Content** navigation.

2. Click **Add Location**.
The **Add/Modify Location** dialog box displays.
3. From the dimension tree under **Refinements** on the left, select the location where you want your content item to display.
4. Click **Add** to copy the location into the **Refinements** list on the right.
5. Select a location option for where the content displays:
 - Select **At this exact location** to display the content item only at the exact location you specified. If a user submits a query from any other location, the content does not display. For example, if the refinement state you specify is Cameras > Digital Cameras, the content only displays at Cameras > Digital Cameras and not at Cameras > Digital Cameras > Canon or anywhere else that Cameras > Digital Cameras appears.
 - De-select **At this exact location** to display the content item at any location in the data set that matches the refinements specified. For example, if you specify the refinement state Cameras > Digital Cameras, the content also displays at Cameras > Digital Cameras > Canon and anywhere else that Cameras > Digital Cameras appears.
6. Click **OK**.
7. Click **Save Changes**.

To specify more refinement triggers, repeat the previous steps. To add a search term trigger, follow the steps for triggering based on search terms.

Setting a home page location

You can create a content item that displays at the root location of your application. Typically, the root location for an application is the home page.

To set a content item as a home page:

1. Click the content item that you want to edit in the **Content** navigation.
2. Click **Add Location**.
The **Add/Modify Location** dialog box displays.
3. Select **Make this page the site's home page**.
4. Click **OK**.
5. Click **Save Changes**.

Controlling who sees content

You can restrict who sees your content by associating the content item with a user segment.

User segments allow Endeca applications to display content to a subset of users. When you associate a content item with a user segment, that user segment becomes another trigger for your content item. For example, if you have two user segments, "members" and "non-members," and you create a content item that contains a membership promotion, you might only want "non-members" to view it. In order to ensure that only users segmented as "non-members" view the content, you must associate that content item with the "non-member" user segment.

To associate a content item with a user segment:

1. Click the content item that you want to edit in the **Content** navigation.
2. Click **Select User Segments**.
The **Add/Modify User Segments** dialog box displays.

3. From the user segment tree on the left, select the user segment that you want to see the content item display.
4. Click **Add** to copy the user segment into the **User Segments** list on the right.
5. Click **OK**.
6. Click **Save Changes**.

Triggering based on time

If you create a content item and only want it to display within a specific time frame, you can specify a date range.

For example, if you create a content item for a Back to School promotion, you can set the item to automatically activate on August 15 and automatically deactivate on September 8.

To specify content item activation dates:

1. Click the content item that you want to edit in the **Content** navigation.
2. Click **Select Time**.
The **Schedule** dialog box displays.
3. Select the **Activate this content only during a specific time** checkbox.
4. Select a start date and start time for the content item.
5. Optionally, you can set an expiration date.
If you choose not to specify an expiration date the content item remains active until manually deactivated.
 - a) Select the **Content Expires** checkbox.
 - b) Specify an expiration date and time.
6. Click **OK**.
7. Click **Save Changes**.

About multiple triggers

If you want a content item to display in more than one location in an application, you can specify multiple triggers.

For a single trigger to display a content item, the user's query must meet all of the trigger's criteria. This means that all of the search terms and refinement states that you specified for the location must be present in the query. For example, if a content item is set to the location Cameras > Digital Cameras with the search term "Canon," then the user must specify both the search term and the refinement state in order for the content to display.

If your content item has more than one location, it displays at each of those locations as long as the conditions for the individual location are met. For example, if you have two locations:

- Cameras > Digital Cameras with the search term "Canon"
- Search term "Canon"

both display the content item as long as all of their individual criteria are met. The content displays at the location "Canon" as well as at Cameras > Digital Cameras with the search term "Canon."

To specify multiple locations, repeat the steps provided for triggering based on refinements and triggering based on search terms as many times as necessary.

If you have specified a date range for a content item or associated an item with a user segment, those conditions must also be met for the content to display.

Adding cartridges to content items

This section describes how to select and configure cartridges for your content items. If you have purchased Oracle Endeca Guided Search only and do not have Oracle Endeca Experience Manager, most of the core cartridges are not available in Workbench. Of the core cartridges, only the Record Spotlight cartridge is available in Rule Manager. Custom cartridges developed by your team can also be found in Rule Manager.

Selecting a cartridge

You designate the content of each content item section by selecting and configuring cartridges.

Every section is designed to accept a certain type of content in the form of a cartridge. For each section, you are presented with a set of cartridges from which to choose. Once you select a cartridge, you can configure it to include the content you need to display within that section.

To select a cartridge for a section:

1. Click the content item that you want to edit in the **Content** navigation.
2. Identify the section you want to add the cartridge to by using the navigation tree in the **Content Editor** and open it for editing.
3. Click **Add**.
The **Select Cartridge** dialog displays.
4. Choose a cartridge from the list.
5. Click **OK**.
6. Click **Save Changes**.

Once you have selected a cartridge for a section, you must configure it to display content appropriate for your section.

Configuring a cartridge

You can configure cartridges to contain information appropriate for each section of a content item.

Cartridges are the pieces of your page that contain the information displayed to users. By configuring cartridges, you can control the placement and display of dimensions, promotions, rich media and other forms of content.

To configure a cartridge:

1. Click the content item that you want to edit in the **Content** navigation.
2. Identify the cartridge that you need to configure by using the navigation tree in the **Content Editor** and open it for editing.
3. Complete all required fields.
Depending on the cartridge you have selected, you might be asked to specify a path to an image or flash file, a title, featured records, rollover text, or additional cartridges.
4. Click **Save Changes**.

The simplest cartridges might need no configuration or only require that you enter text in fields. Other cartridges might need additional configuration.

About customizing dimension display

Refinements consist of dimensions and dimension values. Some cartridges allow you to change the order in which dimensions appear on a page.

Dimensions are the top-level refinements. For example, a Camera application might use the following dimensions, among others:

- Brand Name
- Rating
- Price Range
- Color
- Features

Each dimension can have one or more dimension values. For example, Features can have the following values:

- Face Tracking
- Flash Exposure Lock
- USB Required

Visitors to your Web site can navigate using dimensions and dimension values. In the following example, the user has navigated to cameras under 25 dollars with face tracking.

Showing 1 - 3 of 3 items

Your Selections

Price
Under 25

Features
Face tracking

[Clear All](#)


Narrow Your Results

Brand Name
[Fujifilm \(1\)](#)
[Kodak \(2\)](#)

Color
[Black \(1\)](#)
[Red \(1\)](#)
[Silver \(1\)](#)

Features
[Manual Focus \(1\)](#)
[Album Organization \(1\)](#)
[Auto Focus \(3\)](#)
[Auto Focus \(AF\) Lock \(2\)](#)
[Histogram \(1\)](#)

Display: **12 per page** Sort By: **Relevance**



Kodak EasyShare C143


EasyShare C143, 1/2.3" CCD, 2.7" LCD, 12MP(4026x3026), 640x480/30fps, TTL-AF, 32MB, USB2.0, NTSC/PAL, 172g, red

☆☆☆☆☆ [Reviews\(0\)](#)

\$1.00

[Add to Cart](#)

[+ Add to wishlist](#)



Fujifilm FinePix JV200


FinePix JV200, 14.0MP, 2.7" TFT LCD, 1/2.3" CCD, TTL AF, 4288x3216, 1280x720/30fps, NTSC/PAL, USB2.0, SD/SDHC, Li-ion, 108g, Silver

☆☆☆☆☆ [Reviews\(0\)](#)

\$24.00

[Add to Cart](#)

[+ Add to wishlist](#)



Kodak EasyShare C183

EasyShare C183, 14.6 MP, 3x Optical Zoom, 5x Digital Zoom, 7.62 cm (3.0 ") (7.6 cm) LCD, 32 MB SD/SDHC, Black

☆☆☆☆☆ [Reviews\(0\)](#)

\$5.00

[Add to Cart](#)

[+ Add to wishlist](#)

Ordering of dimensions

By default, the Web site displays dimensions in an order that is specified by your technical team.

What you can do

With certain cartridges, you can override the default ordering of dimensions with Experience Manager. You can choose which dimensions display and in what order they display.

Customizing dimension display

Some cartridges allow you to choose which dimensions display and in what order they display.

To customize dimension order:

1. Select a content item that controls Endeca Guided Navigation from the **Content** navigation.
2. Click **Generate Guided Navigation**.

The **Guided Navigation** dialog box displays.

3. Determine if you want to reuse the existing dimension list.
 - If you want to add dimensions to the current list, then click **No** in the **Remove existing cartridges** field.

- If you want your selections to replace the current list, then click **Yes** in the **Remove existing cartridges** field.
4. Select the dimensions that you want to display.
The **Dimensions** tab contains all the dimensions that are available for this content item. You do not have to use all available dimensions. The **Selected** tab contains the dimensions that display.
You can click **Select All** to add all the dimensions to the list.
 5. Drag and drop the dimensions in the **Selected** box to order them.
 6. Click **Generate Cartridges**.
The new dimension list displays in the Guided Navigation content item.

About customizing the display of results lists

You can customize the results lists that display for a content item by configuring the sort order, relevance ranking strategy, and number of records per page.

The following sections describe how you can customize each aspect of how results are presented:

Sort order

You can choose an order in which to sort the results, for example, **by Name (A-Z)**, **by Price (low to high)**, or **by Price, then Name**. The sort options are specified by your application developer for each cartridge.

If your application developer enables the functionality, a visitor to your Web site can specify a different way to sort results.

Relevance ranking

You can choose a relevance ranking strategy to apply to the results lists, including relevance ranking modules such as **Interpreted** or **Phrase**, or more complex strategies that use multiple modules together. The relevance ranking options are specified by your application developer for each cartridge.

Relevance ranking is only used when a visitor arrives at a location as the result of a search.

Records per page

You can specify how many records should appear on each page. Your application developer specifies a minimum and maximum number of records that can appear on a page.

Customizing the display of results lists

Some cartridges allow you to customize how results lists are presented.

Some of the options described here might not be available for customization in certain cartridges. You do not have to specify a choice for each option.

To customize the display of results:

1. Select a content item that controls results lists in the **Content** navigation.
Because your technical team controls the content of this configuration, it might have custom labeling. For example, if the cartridge is used for a grid layout, the label for the **Records per page** field might have additional information such as **Records (multiple of 4)**.

2. Enter a number of records to display per page.

To use the site default, 10 records, leave the field blank.

3. Select a relevance ranking strategy.

Your application developer specifies the names of the relevance ranking options that are available in the drop-down list. For details about how each option affects the order of results, contact your technical team.

The relevance ranking strategy is used when a visitor arrives at a location as the result of a search. Otherwise, the sort order is used to determine the order of the results.

4. Select a default sort order for the results.

To use the default sorting behavior for the Web site, select the **Default** option in the drop-down list.

Specifying spotlight records for a cartridge

Some types of cartridges let you specify records to spotlight on your content item.

To spotlight specific records from your catalog, select the **Specific records** radio button in the **Spotlight Records** area of the cartridge. To dynamically spotlight a set of records, select the **By query** radio button.



Note: Not all templates and cartridges are designed to spotlight records.

To add a spotlight record to a cartridge:

1. Select a content item in the **Content** navigation.
2. In the **Spotlight Records** pane, select the **Specific Records** radio button.
3. Click **Edit List**.
The **Select Records** dialog box displays.
4. Select a record in the product list by clicking the corresponding checkbox.
The record is added to the **Selected Records** tab.
5. Optionally, repeat the previous step to add additional records to the cartridge.
Cartridges are configured to spotlight only a certain number of records. You can add additional records until you reach this maximum value.
6. Optionally, navigate to the **Selected Records** tab to change the order in which records display.
 - a) Enter a priority value in the **Order** column to assign a new priority to the corresponding record.
Records with a lower priority value appear before those with a higher priority value.
7. Click **Save Selection**.
8. Click **Save Changes**.

To add dynamic spotlight records to a cartridge, follow the steps for specifying dynamic spotlight records for a cartridge.

Specifying dynamic spotlight records for a cartridge

Some types of cartridges let you spotlight a set of records that are contextually relevant to your content item. You can configure a cartridge to display records based on specified refinements.

To dynamically spotlight a set of records, select the **By query** radio button in the **Spotlight Records** area of the cartridge. To spotlight specific records from your catalog, select the **Specific records** radio button.

For example, if you create a page for camera bags, you can configure a cartridge to display a dynamic set of top rated bags without having to pick specific records.



Note: Not all templates and cartridges are designed to spotlight records.

To specify dynamic spotlight records for a cartridge:

1. Select a cartridge in the **Content** navigation.
2. In the **Spotlight Records** pane, select the **Records selected by query** radio button.
3. Click **Edit Query**.
The **Select Records** dialog displays.
4. Select one or more refinements in the **Narrow Your Results** pane.
The refinements appear in the **Filtered State** box.
5. Click **Save Selection**.
6. Optionally, set a maximum number of records to display using the **Number of Records:** drop-down.
7. Optionally, restrict the record results to the current refinement state by selecting **Restrict to active refinements**.
 - Selecting **Restrict to active refinements** uses a combination of the specified refinements and a user's current refinement state to determine which records to display. For example, if you are promoting highly rated camera bags, the record results will vary based on a user's refinement state. If the user has browsed to Bags & Cases > Case Logic, then only top rated bags from Case Logic display. If the user is viewing Bags & Cases > Ricoh, then only top rated bags from Ricoh display.
 - De-selecting **Restrict to active refinements** uses only the specified refinements to determine which records display. The user's current refinement state is ignored. For example, if you are promoting top rated camera bags, the record results display the same set of top rated camera bags no matter what the user's refinement state is.
8. Click **Save Changes**.

To add specific records to a cartridge, follow the steps for specifying spotlight records for a cartridge.

Boosting and burying records

Some types of cartridges let you define what products you want to boost or put on top of the search results list. You can also define products to bury or place deeper in your results.

To boost or bury specific records from your catalog, select the **Specific records** radio button in the **Spotlight Records** area of the cartridge. To dynamically boost or bury a set of records, select the **By query** radio button.



Note: Not all templates and cartridges are designed to boost or bury records.

To boost or bury records in a cartridge:

1. Select a cartridge from the **Content** navigation on the left.
2. Select the records to boost. In the **Boosted Records** pane, select the **Specific Records** radio button.

3. Click **Edit List**.
The **Select Records** dialog box displays.
4. Select a record in the product list by clicking the corresponding checkbox.
The record is added to the **Selected Records** tab.
5. Optionally, repeat the previous step to add additional records to the cartridge.
Cartridges are configured to spotlight only a certain number of records. You can add additional records until you reach this maximum value.
6. Optionally, navigate to the **Selected Records** tab to change the order in which records display.
 - a) Enter a priority value in the **Order** column to assign a new priority to the corresponding record.
Records with a lower priority value appear before those with a higher priority value.
7. Click **Save Selection**.
8. Select the records to bury. In the **Buried Records** pane, select the **Specific Records** radio button.
9. Repeat Steps 3-7.
10. Click **Save Changes**.

Boosting and burying records dynamically

Some types of cartridges enable you to boost or bury a set of records that are contextually relevant to your search results list. You can configure a cartridge to boost or bury records based on specified refinements.

To dynamically boost or bury a set of records, select the **By query** radio button in the **Spotlight Records** area of the cartridge. To boost or bury specific records from your catalog, select the **Specific records** radio button.



Note: Not all templates and cartridges are designed to boost or bury records.

To boost or bury records dynamically:

1. Select a cartridge from the **Content** navigation on the left.
2. In the **Boosted Records** pane, select the **By Query** radio button.
3. Click **Edit Query**.
The **Select Records** dialog displays.
4. Select one or more refinements in the **Narrow Your Results** pane.
The refinements appear in the **Filtered State** box.
5. Click **Save Selection**.
6. Optionally, set a maximum number of records to display using the **Number of Records** drop-down.
7. Optionally, restrict the record results to the current refinement state by selecting **Restrict to active refinements**.
 - Selecting **Restrict to active refinements** uses a combination of the specified refinements and a user's current refinement state to determine which records to display. For example, if you are promoting highly rated camera bags, the record results will vary based on a user's refinement state. If the user has browsed to Bags & Cases > Case Logic, then only top rated bags from Case Logic display. If the user is viewing Bags & Cases > Ricoh, then only top rated bags from Ricoh display.
 - De-selecting **Restrict to active refinements** uses only the specified refinements to determine which records display. The user's current refinement state is ignored. For example, if you are

promoting top rated camera bags, the record results display the same set of top rated camera bags no matter what the user's refinement state is.

8. Repeat Steps 3-7.
9. Click **Save Changes**.

About the image preview feature

For cartridges that are designed to display images, your application developer may have enabled image preview to help you confirm that you have entered the correct image URL.

If a cartridge includes more than one field to define an image URL, you must fill in all fields before the image preview displays. Once the preview has loaded, you can click on the preview image to see a full-size version of the image.

Prioritizing content items

This section explains the concept of content item priority and describes how to prioritize content.

About content item priority

Content items within a content collection are prioritized numerically, with the lowest numbers given the highest priority. By increasing the priority of a content item, you increase the likelihood that content displays if there are other content items with overlapping trigger criteria.

For example, you have two content items in a collection with these settings:

- A "Digital Cameras" page that is set to trigger at the refinement state Cameras > Digital Cameras and allowed to display at any location that matches Cameras > Digital Cameras
- A "Digital Cameras from Canon" page that is set to trigger at the refinement state Cameras > Digital Cameras> Canon and restricted to display at only that exact location

If you prioritize "Digital Cameras from Canon" as a "1," and "Digital Cameras" as a "2," then "Digital Cameras from Canon" will always be evaluated first. That means that even though both pages *could* display to a user who navigated to Cameras > Digital Cameras> Canon, only "Digital Cameras from Canon" will display. The "Digital Cameras" page still displays at any other location where a user navigates to Cameras > Digital Cameras, but it will always be evaluated after the more specific "Digital Cameras from Canon" page.

However, if you were to prioritize "Digital Cameras" before "Digital Cameras from Canon," then the page "Digital Cameras from Canon" would never display in your application. It is important to make sure that more specific pages (pages with more complex triggering criteria) are given high priority to prevent them from being blocked by more general pages.

Prioritizing content items

New content items are automatically listed in the content collection with the lowest priority. You need to manually assign the appropriate priority number to each content item that you create.

The **Priority** column of the content collection allows you to increase or decrease the priority of a content item.

To assign or change the priority of a content item:

1. In the Content navigation, click the content collection with the content items that you need to prioritize.
2. In the **Priority** column, highlight the number in the text box of the item that you want to re-prioritize and replace it with the new priority number. For example, if you want a content item to have the highest priority, type 1.
3. Click **Save Changes**.

Tips and troubleshooting for content item priority

It is important to make sure that more specific content items with more complex triggering criteria are given high priority to prevent them from being blocked by more generic items.

- If you have a home page dynamic page, or dynamic pages that are not constrained by the **At this exact location** setting in the **Add/Modify Location** dialog, make sure that they are prioritized near the bottom of the content collection list. They might block other pages from displaying.
- Make sure that content items with more complex triggering criteria are placed higher on the list. For example, you should place a dynamic page set to the location Cameras > Digital Cameras > Canon higher than a dynamic page set to the location Cameras > Digital Cameras.
- Other content collections might affect the results of the content collection that you are viewing.

Previewing content items


This section contains information about the preview application, provides instructions for previewing content with or without a preview application, and includes a reference section for understanding preview status messages.

About previewing content items

Previewing is useful for testing your content items.

Experience Manager provides previewing information about each content item in a collection. Previewing information briefly describes why each content item does or does not display when you search and navigate in the preview application. With the preview information, you can better understand how content items behave by testing them in your application.

Querying a location in the data set is simplified by the preview command for a content item. This command provides a testing convenience to trigger the content item. Clicking the preview command displays the trigger's refinement state and evaluates all pages included in the preview.

For example, an Experience Manager user wants to know which page displays when he or she navigates to Cameras > Digital Cameras > Canon and why the others do not display. From the **Content** navigation of Experience Manager, the user hovers the mouse pointer over a content item, clicks the **Actions** icon , and then clicks **Preview**. The user can select a page to display from the dialog box.

If a page displays with the message **Fired**, then it successfully displayed at the preview location. For detailed descriptions on all other status messages, refer to the reference table for preview status messages.

About previewing without a preview application

If you do not have a preview application enabled, you can still test your dynamic pages to see whether or not they fire in a specific location by using the color coding and status messages on the **Content Collection** page table.


The procedure for previewing is the same whether or not you have a preview application set up. However, without an application enabled there is no visual representation of your dynamic pages, so you must rely solely on the auditing feature of the **Content Collection** page table for information about dynamic page behavior.

Once you click **Preview**, the **Content Collection** page table displays status messages to explain why pages did or did not display. The status messages are updated each time you query a location, and your location is displayed as breadcrumb text in the **Preview pane**.

Previewing content items

While you are developing content items, it is important to test them and ensure that they are performing and displaying as you intended.

You can test content items using the preview feature available in Experience Manager. Content displays as you search and navigate through the preview application.

1. In the **Content** navigation, hover over a content item and click the **Actions** icon .
2. Click **Preview**.
 - If the content item that you are previewing displays on more than one page, a selection dialog appears. Select a page that you want to preview. The page displays in a new window or tab.
 - If the content item only displays on one page or if the content item is a page, then the page displays in a new window or tab.
3. After you are finished viewing the preview application, close the tab or window.
4. Edit the content items if necessary, and then repeat the previous steps until you achieve the intended results.



Managing content items

This section contains instructions for modifying existing content items.

Copying an existing content item

Copying a content item provides a convenient starting point for creating similar ones.

To copy a content item:

1. In the **Content** navigation, hover over the content item that you want to copy and click the **Actions** icon , and then click **Copy**.
2. Hover over the content collection where you want to add the copied content item, and click the **Actions** icon , and then click **Paste**.
The copied item displays in the content collection with **copy** appended to the name.
3. Click the content item in the **Content** navigation and modify it as necessary.
4. Click **Save Changes**.

Modifying a content item

You can modify content items, but Oracle does not recommend editing *active* content items.

Copy the active content item and make all your modifications in the copy. After you are satisfied with your results, you can activate the copy and deactivate the original content item.

To modify a content item:

1. In the **Content** navigation, copy and paste the content item that you need to modify.
2. Make the necessary modifications to the new copy.
3. In the copy, click **Activate** and then click **Save Changes**.
4. After testing and previewing the copy, deactivate the original content item.
5. Click **Save Changes**.

Modifying a content item location

If necessary, you can change the location of a content item.

To modify a content item location:

1. Click the content item you need to edit in the **Content** navigation.
2. In the **Location** field of the **Summary**, click the location that you want to modify.
The **Add/Modify Location** dialog box displays.
3. Modify the location.
4. Click **OK**.
5. Click **Save Changes**.

Deleting a content item location

If necessary, you can remove locations from content items.

To delete a location:

1. In the **Content** navigation, select the content item with the location that you need to delete.
2. In the **Location** field of the content item **Summary**, click the **X** icon next to the location that you need to remove.
3. Click **Save Changes**.

The content item no longer displays content at that location.

Changing a cartridge

You can rearrange or replace an existing cartridge.

To change a cartridge:

1. In the **Content** navigation, identify the content item with the cartridge that you need to change.
2. Use the **Content Editor** to select a cartridge and open it for editing.
3. Change or reorder the cartridge.
 - From the **Content Editor**, drag and drop the cartridge to a new location in the tree. You can only drop a cartridge into a list that is designed for that type of cartridge.
 - In the **Content Editor** click a cartridge and then click the **Change** button associated with the cartridge you need to replace.

If you chose to change a cartridge, the **Select Cartridge** dialog displays.

4. Select a new cartridge.
5. Click **OK**.
6. Click **Save Changes**.

Removing a cartridge

You can remove a cartridge from a section using the **Content Tree Editor**.

To remove a cartridge from a section:

1. In the **Content** navigation, identify the content item with the cartridge that you want to remove.
2. In the **Content Editor**, right-click the cartridge and choose **Remove Navigation**.
3. When the warning displays, click **OK**.
4. Click **Save Changes**.

Deleting a content item

You can delete a content item from a content collection.

To delete a content item:

1. In the **Content** navigation, click the content collection with the content item that you want to delete.
2. Click the **Delete** icon in the row for the item.
The row turns gray.
3. Click **Save Changes**.
The content item is not deleted until you click **Save Changes**.

Chapter 3

Content Spotlighting with Rule Manager

This section provides an overview for creating and spotlighting content with the Oracle Endeca Rule Manager.

About Rule Manager

If you have purchased Oracle Endeca Guided Search only and do not have Oracle Endeca Experience Manager, you can spotlight content with Rule Manager.

Rule Manager is a merchandising and spotlighting tool that lets you create and modify content, activate and deactivate content, and change their priority in an authoring application. Merchandising and spotlighting records is a process of identifying and promoting contextually relevant records, based on Rule Manager specifications, to users as they navigate or search within a data set. Rule Manager lets you define the conditions for promoting these records for display to application users.

With Rule Manager, you work from custom templates and content collections to create rich, data-driven content easily. Rule Manager lets you manage the placement and display of catalog records, promotions, and other forms of content spotlighting. Content can be used in any number of locations across a site, decreasing the time for creating and maintaining content. Rule Manager presents the relevant content to visitors at each step of the online experience based on their searches and site navigation.

Whether your visitors are directed from an external search engine or from on-site search and navigation, well-designed content is integral to an engaging user experience. Presenting content in a targeted, relevant manner has been shown to significantly boost conversion rates and can increase the effectiveness of both paid and natural search campaigns.

About content items and content collections

You can use content items and content collections to define what content can display in your application whether it displays on a page or in a section of a page.

Content items

A content item describes the logic of how to promote content for display to application users. Content items implement merchandising and content spotlighting features. Merchandising and spotlighting content is a process of identifying and promoting contextually relevant records to visitors as they navigate or search within a catalog.

Content items have several parts: the records in a data set, the conditions that must be met for those records to display, and the templates that determine how those records are rendered in the application. In short, the content item describes triggers as well as results. Dynamic pages and page sections are examples of content items. You can use content items to configure pages or sections to show global promotions, or to limit the display of featured products and categories to contextually relevant suggestions.

Content collections

A content collection is composed of one or more nested content items. Each content collection includes a restriction on the type of content that can be defined within it. For example, if you want to create a content collection for product spotlighting, you might restrict the collection to only allow `SecondaryContent` type of cartridges. Each product spotlighting item in the content collection has conditions that determine when that item displays records. When you configure the section that gets dynamically populated by the content collection, you select a dynamic slot cartridge to reference the product spotlighting collection. Dynamic slots let you populate content in the section based on triggers in the collection independent of the page triggers.

Content collections can be created in the left navigation tree either at the root of the **Content** section or inside a folder. A content collection can only contain content items; it cannot contain other content collections or folders.

Content item example

The following picture shows a New RecordSpotlight content item being added to the Right Column Spotlights content collection in the Discover application.

The screenshot displays the Oracle Endeca Workbench interface for configuring content items. On the left, a sidebar shows a tree view with 'Content' expanded, revealing 'Right Column Spotlights' and 'Brand - Canon - Cameras'. The main area is titled 'Content > Right Column Spotlights' and contains a '+ New RecordSpotlight' button and a 'Name' input field. Below this, a 'Right Column Spotlights > New RecordSpotlight' dialog is open, featuring 'Discard' and 'Save Changes' buttons. The dialog has a 'RecordSpotlight Summary' section with fields for 'Name' (New RecordSpotlight), 'Location' (Applies at all locations), and 'Template' (RecordSpotlight). It also includes 'Inactive' and 'Activate' status controls, an 'Add Location' button, and 'Select User Segments' and 'Select Time' options. At the bottom, the 'Content Editor' is visible with an 'XML View' tab. The 'Section Settings' section shows 'Section Type' as RecordSpotlight and 'Cartridge' as RecordSpotlight. The 'Define Spotlight' section includes 'Spotlight Title' (Featured Cameras), 'Max Number Of Records' (10), and a radio button for 'Specific records'.

Components of content items

Templates, sections, and cartridges are the core components of the content items that you create.

Templates

Templates define overall layout and style for a content item. In general, templates are created by developers to reflect samples designed by the creative team. The team creates templates for pages and sections of pages. The resulting documents are uploaded into Oracle Endeca Rule Manager or Experience Manager and serve as a framework for you to build upon and customize.

Sections

Templates contain sections that serve as placeholders for the display of products, dimensions, promotions, rich media, and other forms of content. Developers configure each section to accept certain types of content in the form of a cartridge.

Cartridges

Cartridges are essentially mini-templates that you plug into sections and then configure to contain the content you want to display on your page. Each cartridge might have several fields to configure, and might contain additional cartridges. Depending on the cartridge you have selected, you might be asked to specify a path to an image or flash file, a title, rollover text, or additional cartridges. The simplest cartridges might need no configuration.

Templates and cartridges are custom-built by developers, so each might have a unique set of options for configuration.

Overview of creating a content item

With the Oracle Endeca Rule Manager, you create a content item, choose a template, and designate content. You can specify when and where it is displayed.

The following describes the process for creating a content item with Rule Manager:

1. In the **Content** navigation in Rule Manager, select the content collection in which you want to create the content item.
2. Configure the content item:
 - Choose a template.
 - Set a location for your content item.
 - Specify active dates and times (optional).
 - Select a **User Segment** to restrict who sees your dynamic page (optional).
 - For each section, select and configure cartridges.
3. Activate and save the content item.
4. Set the priority of the content item within the content collection.

Creating content items


This section describes how to create a content item, choose a template, and add the item to a collection.

Creating a content item

You can create a content item in a content collection.

Content items determine the content that displays in a page or page section as well as any conditions that must be met before the content displays. Your application can reference the content item directly or dynamically by referencing the content collection that contains the item.

To create a content item:

1. To create a content item: In the **Content** navigation, hover the mouse pointer over the content collection and click the **Actions** icon , and select **Add Content Item**.
Alternatively, you can click the content collection, and then click **New...** at the top of the collection list page.
2. In the **Name** text box, specify a name for your new content item.
3. Click **Save Changes**.

You still need to choose a template, determine when and where the content displays, and designate content.

Choosing a template

Templates are the starting point for building your content items.

To choose a template for a content item, or to change the template for an existing one:

1. Click the content item that you want to edit in the **Content** navigation.
2. Click **Select Template**.
The **Select Template** dialog displays.
3. From the **Select Template** menu choose a template appropriate for your content item.



Caution: If you change the template for an existing content item, any content configured prior to the change is lost.

4. Click **OK**.
5. Click **Save Changes**.

Next, you can choose cartridges and designate content for each section in your template.

About configuring sections

Templates consist of configurable sections that serve as placeholders for the display of dimensions, promotions, rich media, and other forms of content. Typically, these sections are empty until you designate content items for them.

About dynamic slots

Dynamic slots allow you to manage and trigger different sections of a page independently from the rest of the page.

You can use a dynamic slot to control a page or page section and configure the slot to reference a content collection. The dynamic slot is associated with a content collection rather than a single content item. The content collection contains multiple content items, each with its own triggers and content. The dynamic slot dynamically populates the page or section based on the triggers and priority of the content items within the collection.

Using dynamic slots in page sections

A page section can have multiple cartridges, but most cartridges can only point to a single content item. The exception is the dynamic slot cartridge. Page sections can display content using a different

set of triggers from those used in the rest of the page. In this way dynamic slot sections are like dynamic mini-pages. See *About controlling the display of content* for more information on triggers.

Use a dynamic slot cartridge when you want to:

- Reuse content.

Once a set of conditions has been created to manage a specific page section, dynamic slots let you share the page section across multiple pages.

- Vary your content.

Page sections can display using a different set of triggers from those used in the rest of the page.

- Limit access to content items.

When different sections of a page are managed in separate content collections, a business user can make changes to just the triggers within a single content collection and update all pages that reference that collection. The business user does not need access to the individual pages in order to update them.

Example uses of dynamic slots

Use dynamic slots for the following activities:


- Control the brand banner images that display throughout the site.
- Specify the images that display at a particular navigation state (for example, Digital Cameras > Kodak) even if there is no specific landing page for that navigation state.
- Display promotions in the menu area based on more specific trigger criteria than those that apply to the page as a whole. For example, you could create a page to use as a base for all "Digital Cameras" pages, and populate the menu sections with more specific content based on the brand, price range, or other dimensions.
- Display promotions in the menu area based on trigger criteria that are simply different from those on the page as a whole. For example, there might be a "Back to School" special for a particular time frame that applies to all pages within a category or even the entire site. This model lets you reuse content for individual sections across a variety of pages. The reusable sections are managed in a central location so that updates immediately take effect across all the pages that include the reused content. You do not need to edit each one manually.

Creating a content collection

You can create content collections to manage the content within dynamic slots.

A content collection is composed of one or more nested content items of the same type. You create the content collection and then add content items. The dynamic slot references the content collection, and uses the triggers defined in the items to determine the content to display.

To add a content collection:

1. Hover the mouse pointer over a folder or the **Content** heading in the left navigation, click the **Actions** icon , and then select **Add Collection**. The **Add Content Collection** dialog displays.
2. Enter a **Name**.
Enter a name that describes the page or section where the content is likely to be used, for example, *Guided Navigation* or *Detail Pages*.
3. Select a content type from the **Content Type Allowed** drop-down list.

Your collection is limited to content items of this type.

4. Select how many content items that are evaluated in **Evaluation Limit**.

For example, if an **Evaluation Limit** is set to two, then after two content items have been evaluated successfully, no additional items are evaluated.

5. Click **Add**.

The content collection displays in the **Content** section in the left navigation. You still have to add one or more content items and add a dynamic slot cartridge to your application.

Creating a dynamic slot

You can create a dynamic slot for page sections.

Dynamic slot cartridges control content in a page or a page section such as a sidebar. The dynamic slot populates the section with content using a different set of triggers from those used in the rest of the page. You configure the slot to reference a content collection.

1. In the **Content** navigation, click the content item where you want to add the dynamic slot.
2. Identify the page section you need to configure by using the navigation tree in the **Content Editor** and open it for editing.
3. Click **Add**.
The **Select Cartridge** dialog displays.
4. Choose a dynamic cartridge from the list.
5. From the **Content Collection** drop-down list, select the collection that you want to dynamically display.
Only collections that are appropriate for that section display in the list.
6. Click **Save Changes**.

About applying one content item to multiple locations

Typically, there will be many locations deep within your catalog that do not have, or do not need, highly specialized dynamic experiences. These lower-traffic locations can still benefit from a common, stylized design and data-driven content and product spotlighting.

These deep low-traffic locations are called "long tails" because they represent the tail of a demand curve. While the more popular, high-traffic locations tend to see higher conversion rates individually, the long tails of catalogs have been shown to be worth more collectively. Because of this, creating dynamic experiences to cover the long tail products of your catalog can significantly boost overall conversion rates for your Web site.

You can create one content item, populate it with dynamic cartridges, and apply it to many different locations in your application. This simultaneously decreases the investment of time and effort, and increases the value of each of the long tails.

For example, you realize that your television category is performing poorly, and you decide to address the issue by creating a dynamic experience to help guide customers to the right television. It would take an enormous amount of time and effort to individually create unique content items for every possible location in a category, so instead you choose to create a single content item that will update and adjust as a user navigates through the application.

For this new content item, you choose a cartridge called "BestSellers." You click **Select Records** to choose products for that cartridge, but instead of selecting records by ID, you want to populate the

cartridge with a dynamic set of records that will update and adjust as the user navigates through the application. In order to do that, you select the **Dynamic Records** option from the **Select Records** dialog box, and then choose refinements:

- Select the refinement Televisions > Best Sellers
- Select the **Restrict to Refinement State** checkbox

By restricting the results to the user's refinement state, you create a product spotlight that updates with relevant results every time a user navigates to a new location. This means that when the user is at Televisions > HDTV, the products that display in the spotlight are best-selling HDTVs. Then, if the user navigates to Televisions > HDTV > Sony, the products that display in the spotlight are best-selling Sony HDTVs.

By populating a content item dynamically instead of using static content, you create a relevant, engaging experience for all of the locations in your television category.



Note: You can only choose refinements that exist in your application. If your application developer has not defined the refinement set "Best Sellers," it does not display as an option.

Controlling the display of content

This section describes triggers and how to use them to control the display of content.

About controlling the display of content

Content only displays in your application if a specified set of search and navigation conditions exist in the content item. These conditions are known as triggers.

Once you have created a content item, you can set it to display content at a specific location in your application. The location is defined by a particular set of refinements or search terms that trigger the content to display.

There are also triggers to control who sees the content, as well as triggers to specify the times and dates when content is active.

By default, a new content item has no trigger until you add one. You can choose not to add any specific location and instead allow the content to display at every location in your Web application. This means that relevant content displays with any query a user makes—with any search term or refinement state. It also means that anyone can see it, and it is not constrained by a time frame.

If you choose not to add any locations to your content item, assign it a low priority. If you don't assign it a low priority, it will take precedence over content items in the content collection that are designed specifically for certain locations and prevent them from displaying.

Refinement trigger

A collection of one or more refinements can trigger content if a user navigates to a location that contains those refinement states.

For example, if your location is set to trigger on the refinement state Cameras > Digital Cameras > Canon, and a user navigates to Cameras > Digital Cameras and then to Canon, your content displays. The content does not display if the user only navigates to Cameras > Digital Cameras.

Search term trigger

One or more search terms can trigger content to display if a user's query includes the terms. You can specify one or more search terms and the match mode for the search terms. While you can only specify one search term or search term phrase per location, you can specify several locations for a single content item.

For example, if your location is set to trigger on the search term "Kodak," and a user searches for "Kodak," your content displays.

Combination triggers

You can specify both a search term trigger and a refinement trigger for a content item. If a location contains both a search term and a refinement state, both sets of criteria must be met in order for the content to display.

For example, if your location is set to trigger on the refinement state Cameras > Digital Cameras and the search term "Ricoh," a user must search for the term "Ricoh" from the Cameras > Digital Cameras refinement state in order for the content to display.

User segment triggers

You can control who sees your content by associating the content item with a user segment. User segments enable Oracle Endeca applications to display content to an end user based on that user's identity.

For example, if you have a "Free Shipping" promotion but only "Members" are eligible, you would select the "Members" segment so that users identified as non-members would never see the promotion.

Date and time triggers

If you create a content item and only want it to run within a specific time frame, you can trigger it to display content only during that time frame by specifying start and end dates as well as start and end times. Only during the active dates will the content display to end users in the application.

For example, if you create a content item for a Digital Camera promotion that only runs between April 3 and May 6, you can set the promotion to automatically activate and deactivate on those dates.

Triggering based on search terms

You can set a content item to display when a user searches for specific terms.

For example, if you create a dynamic page for Canon cameras, you might want it to display when a user searches for the term "Canon." You can accomplish this by setting the term "Canon" as a search term trigger.

To trigger based on a search term:

1. Click the content item that you want to edit in the **Content** navigation.
2. Click **Add Location**.
The **Add/Modify Location** dialog box displays.
3. In the **Search Term** text box, type a search term or phrase.

4. Select a match mode from the drop-down list:
 - In **Match Phrase** mode (the default), all of the words in the user's query must match in the same order as the search term location for the content item to display.
 - In **Match All** mode, all of the words of the user's query must match (without regard for order) the search term location for the content item to display.
 - In **Match Exact** mode, all the words of the user's query must exactly match a the search term location for the content item to display. Unlike the other two modes, a user's query must exactly match the search term location in the number of words and cannot include any extra words.
5. Click **Set** to copy the search term location to the **Search Term** list.

6. Click **OK**.
7. Click **Save Changes**.

To specify multiple search term locations, repeat the previous steps. To add a refinement trigger, follow the steps for triggering based on refinements.

Triggering based on refinements

You can set a content item to display when a user navigates to a specific set of refinements in your application.

For example, if you create a content item for Canon cameras, you might want it to display when a user navigates to Cameras > Digital Cameras > Canon. You can set the content to display at that location by specifying a trigger based on the refinement state Cameras > Digital Cameras > Canon.

To trigger based on a refinement state:

1. Click the content item that you want to edit in the **Content** navigation.
2. Click **Add Location**.
The **Add/Modify Location** dialog box displays.
3. From the dimension tree under **Refinements** on the left, select the location where you want your content item to display.
4. Click **Add** to copy the location into the **Refinements** list on the right.
5. Select a location option for where the content displays:
 - Select **At this exact location** to display the content item only at the exact location you specified. If a user submits a query from any other location, the content does not display. For example, if the refinement state you specify is Cameras > Digital Cameras, the content only displays at Cameras > Digital Cameras and not at Cameras > Digital Cameras > Canon or anywhere else that Cameras > Digital Cameras appears.

- De-select **At this exact location** to display the content item at any location in the data set that matches the refinements specified. For example, if you specify the refinement state Cameras > Digital Cameras, the content also displays at Cameras > Digital Cameras > Canon and anywhere else that Cameras > Digital Cameras appears.

6. Click **OK**.

7. Click **Save Changes**.

To specify more refinement triggers, repeat the previous steps. To add a search term trigger, follow the steps for triggering based on search terms.

Setting a home page location

You can create a content item that displays at the root location of your application. Typically, the root location for an application is the home page.

To set a content item as a home page:

1. Click the content item that you want to edit in the **Content** navigation.
2. Click **Add Location**.
The **Add/Modify Location** dialog box displays.
3. Select **Make this page the site's home page**.
4. Click **OK**.
5. Click **Save Changes**.

Controlling who sees content

You can restrict who sees your content by associating the content item with a user segment.

User segments allow Endeca applications to display content to a subset of users. When you associate a content item with a user segment, that user segment becomes another trigger for your content item. For example, if you have two user segments, "members" and "non-members," and you create a content item that contains a membership promotion, you might only want "non-members" to view it. In order to ensure that only users segmented as "non-members" view the content, you must associate that content item with the "non-member" user segment.

To associate a content item with a user segment:

1. Click the content item that you want to edit in the **Content** navigation.
2. Click **Select User Segments**.
The **Add/Modify User Segments** dialog box displays.
3. From the user segment tree on the left, select the user segment that you want to see the content item display.
4. Click **Add** to copy the user segment into the **User Segments** list on the right.
5. Click **OK**.
6. Click **Save Changes**.

Triggering based on time

If you create a content item and only want it to display within a specific time frame, you can specify a date range.

For example, if you create a content item for a Back to School promotion, you can set the item to automatically activate on August 15 and automatically deactivate on September 8.

To specify content item activation dates:

1. Click the content item that you want to edit in the **Content** navigation.
2. Click **Select Time**.
The **Schedule** dialog box displays.
3. Select the **Activate this content only during a specific time** checkbox.
4. Select a start date and start time for the content item.
5. Optionally, you can set an expiration date.
If you choose not to specify an expiration date the content item remains active until manually deactivated.
 - a) Select the **Content Expires** checkbox.
 - b) Specify an expiration date and time.
6. Click **OK**.
7. Click **Save Changes**.

About multiple triggers

If you want a content item to display in more than one location in an application, you can specify multiple triggers.

For a single trigger to display a content item, the user's query must meet all of the trigger's criteria. This means that all of the search terms and refinement states that you specified for the location must be present in the query. For example, if a content item is set to the location Cameras > Digital Cameras with the search term "Canon," then the user must specify both the search term and the refinement state in order for the content to display.

If your content item has more than one location, it displays at each of those locations as long as the conditions for the individual location are met. For example, if you have two locations:

- Cameras > Digital Cameras with the search term "Canon"
- Search term "Canon"

both display the content item as long as all of their individual criteria are met. The content displays at the location "Canon" as well as at Cameras > Digital Cameras with the search term "Canon."

To specify multiple locations, repeat the steps provided for triggering based on refinements and triggering based on search terms as many times as necessary.

If you have specified a date range for a content item or associated an item with a user segment, those conditions must also be met for the content to display.

Adding cartridges to content items

This section describes how to select and configure cartridges for your content items. If you have purchased Oracle Endeca Guided Search only and do not have Oracle Endeca Experience Manager, most of the core cartridges are not available in Workbench. Of the core cartridges, only the Record Spotlight cartridge is available in Rule Manager. Custom cartridges developed by your team can also be found in Rule Manager.

Selecting a cartridge

You designate the content of each content item section by selecting and configuring cartridges.

Every section is designed to accept a certain type of content in the form of a cartridge. For each section, you are presented with a set of cartridges from which to choose. Once you select a cartridge, you can configure it to include the content you need to display within that section.

To select a cartridge for a section:

1. Click the content item that you want to edit in the **Content** navigation.
2. Identify the section you want to add the cartridge to by using the navigation tree in the **Content Editor** and open it for editing.
3. Click **Add**.
The **Select Cartridge** dialog displays.
4. Choose a cartridge from the list.
5. Click **OK**.
6. Click **Save Changes**.

Once you have selected a cartridge for a section, you must configure it to display content appropriate for your section.

Configuring a cartridge

You can configure cartridges to contain information appropriate for each section of a content item.

Cartridges are the pieces of your page that contain the information displayed to users. By configuring cartridges, you can control the placement and display of dimensions, promotions, rich media and other forms of content.

To configure a cartridge:

1. Click the content item that you want to edit in the **Content** navigation.
2. Identify the cartridge that you need to configure by using the navigation tree in the **Content Editor** and open it for editing.
3. Complete all required fields.
Depending on the cartridge you have selected, you might be asked to specify a path to an image or flash file, a title, featured records, rollover text, or additional cartridges.
4. Click **Save Changes**.

The simplest cartridges might need no configuration or only require that you enter text in fields. Other cartridges might need additional configuration.

Specifying spotlight records for a cartridge

Some types of cartridges let you specify records to spotlight on your content item.

To spotlight specific records from your catalog, select the **Specific records** radio button in the **Spotlight Records** area of the cartridge. To dynamically spotlight a set of records, select the **By query** radio button.



Note: Not all templates and cartridges are designed to spotlight records.

To add a spotlight record to a cartridge:

1. Select a content item in the **Content** navigation.
2. In the **Spotlight Records** pane, select the **Specific Records** radio button.
3. Click **Edit List**.
The **Select Records** dialog box displays.
4. Select a record in the product list by clicking the corresponding checkbox.
The record is added to the **Selected Records** tab.
5. Optionally, repeat the previous step to add additional records to the cartridge.
Cartridges are configured to spotlight only a certain number of records. You can add additional records until you reach this maximum value.
6. Optionally, navigate to the **Selected Records** tab to change the order in which records display.
 - a) Enter a priority value in the **Order** column to assign a new priority to the corresponding record.
Records with a lower priority value appear before those with a higher priority value.
7. Click **Save Selection**.
8. Click **Save Changes**.

To add dynamic spotlight records to a cartridge, follow the steps for specifying dynamic spotlight records for a cartridge.

Specifying dynamic spotlight records for a cartridge

Some types of cartridges let you spotlight a set of records that are contextually relevant to your content item. You can configure a cartridge to display records based on specified refinements.

To dynamically spotlight a set of records, select the **By query** radio button in the **Spotlight Records** area of the cartridge. To spotlight specific records from your catalog, select the **Specific records** radio button.

For example, if you create a page for camera bags, you can configure a cartridge to display a dynamic set of top rated bags without having to pick specific records.



Note: Not all templates and cartridges are designed to spotlight records.

To specify dynamic spotlight records for a cartridge:

1. Select a cartridge in the **Content** navigation.
2. In the **Spotlight Records** pane, select the **Records selected by query** radio button.
3. Click **Edit Query**.
The **Select Records** dialog displays.
4. Select one or more refinements in the **Narrow Your Results** pane.
The refinements appear in the **Filtered State** box.
5. Click **Save Selection**.
6. Optionally, set a maximum number of records to display using the **Number of Records:** drop-down.
7. Optionally, restrict the record results to the current refinement state by selecting **Restrict to active refinements**.
 - Selecting **Restrict to active refinements** uses a combination of the specified refinements and a user's current refinement state to determine which records to display. For example, if you are promoting highly rated camera bags, the record results will vary based on a user's refinement

state. If the user has browsed to Bags & Cases> Case Logic, then only top rated bags from Case Logic display. If the user is viewing Bags & Cases > Ricoh, then only top rated bags from Ricoh display.

- De-selecting **Restrict to active refinements** uses only the specified refinements to determine which records display. The user's current refinement state is ignored. For example, if you are promoting top rated camera bags, the record results display the same set of top rated camera bags no matter what the user's refinement state is.

8. Click **Save Changes**.

To add specific records to a cartridge, follow the steps for specifying spotlight records for a cartridge.

Prioritizing content items

This section explains the concept of content item priority and describes how to prioritize content.

About content item priority

Content items within a content collection are prioritized numerically, with the lowest numbers given the highest priority. By increasing the priority of a content item, you increase the likelihood that content displays if there are other content items with overlapping trigger criteria.

For example, you have two content items in a collection with these settings:

- A "Digital Cameras" page that is set to trigger at the refinement state Cameras > Digital Cameras and allowed to display at any location that matches Cameras > Digital Cameras
- A "Digital Cameras from Canon" page that is set to trigger at the refinement state Cameras > Digital Cameras> Canon and restricted to display at only that exact location

If you prioritize "Digital Cameras from Canon" as a "1," and "Digital Cameras" as a "2," then "Digital Cameras from Canon" will always be evaluated first. That means that even though both pages *could* display to a user who navigated to Cameras > Digital Cameras> Canon, only "Digital Cameras from Canon" will display. The "Digital Cameras" page still displays at any other location where a user navigates to Cameras > Digital Cameras, but it will always be evaluated after the more specific "Digital Cameras from Canon" page.

However, if you were to prioritize "Digital Cameras" before "Digital Cameras from Canon," then the page "Digital Cameras from Canon" would never display in your application. It is important to make sure that more specific pages (pages with more complex triggering criteria) are given high priority to prevent them from being blocked by more general pages.

Prioritizing content items

New content items are automatically listed in the content collection with the lowest priority. You need to manually assign the appropriate priority number to each content item that you create.

The **Priority** column of the content collection allows you to increase or decrease the priority of a content item.

To assign or change the priority of a content item:

1. In the Content navigation, click the content collection with the content items that you need to prioritize.
2. In the **Priority** column, highlight the number in the text box of the item that you want to re-prioritize and replace it with the new priority number. For example, if you want a content item to have the highest priority, type 1.
3. Click **Save Changes**.



Managing content items

This section contains instructions for modifying existing content items.

Copying an existing content item

Copying a content item provides a convenient starting point for creating similar ones.

To copy a content item:

1. In the **Content** navigation, hover over the content item that you want to copy and click the **Actions** icon , and then click **Copy**.
2. Hover over the content collection where you want to add the copied content item, and click the **Actions** icon , and then click **Paste**.
The copied item displays in the content collection with **copy** appended to the name.
3. Click the content item in the **Content** navigation and modify it as necessary.
4. Click **Save Changes**.

Modifying a content item

You can modify content items, but Oracle does not recommend editing *active* content items.

Copy the active content item and make all your modifications in the copy. After you are satisfied with your results, you can activate the copy and deactivate the original content item.

To modify a content item:

1. In the **Content** navigation, copy and paste the content item that you need to modify.
2. Make the necessary modifications to the new copy.
3. In the copy, click **Activate** and then click **Save Changes**.
4. After testing and previewing the copy, deactivate the original content item.
5. Click **Save Changes**.

Modifying a content item location

If necessary, you can change the location of a content item.

To modify a content item location:

1. Click the content item you need to edit in the **Content** navigation.
2. In the **Location** field of the **Summary**, click the location that you want to modify.

The **Add/Modify Location** dialog box displays.

3. Modify the location.
4. Click **OK**.
5. Click **Save Changes**.

Deleting a content item location

If necessary, you can remove locations from content items.

To delete a location:

1. In the **Content** navigation, select the content item with the location that you need to delete.
2. In the **Location** field of the content item **Summary**, click the **X** icon next to the location that you need to remove.
3. Click **Save Changes**.

The content item no longer displays content at that location.

Changing a cartridge

You can rearrange or replace an existing cartridge.

To change a cartridge:

1. In the **Content** navigation, identify the content item with the cartridge that you need to change.
2. Use the **Content Editor** to select a cartridge and open it for editing.
3. Change or reorder the cartridge.
 - From the **Content Editor**, drag and drop the cartridge to a new location in the tree. You can only drop a cartridge into a list that is designed for that type of cartridge.
 - In the **Content Editor** click a cartridge and then click the **Change** button associated with the cartridge you need to replace.

If you chose to change a cartridge, the **Select Cartridge** dialog displays.

4. Select a new cartridge.
5. Click **OK**.
6. Click **Save Changes**.

Removing a cartridge

You can remove a cartridge from a section using the **Content Tree Editor**.

To remove a cartridge from a section:

1. In the **Content** navigation, identify the content item with the cartridge that you want to remove.
2. In the **Content Editor**, right-click the cartridge and choose **Remove Navigation**.
3. When the warning displays, click **OK**.
4. Click **Save Changes**.

Deleting a content item

You can delete a content item from a content collection.

To delete a content item:

1. In the **Content** navigation, click the content collection with the content item that you want to delete.
2. Click the **Delete** icon in the row for the item.
The row turns gray.
3. Click **Save Changes**.
The content item is not deleted until you click **Save Changes**.

Chapter 4

Working with Keyword Redirects

This section introduces keyword redirects and explains how to create, modify, delete, and view them from the **Keyword Redirects** page in Oracle Endeca Workbench.

About keyword redirects

You can configure a keyword redirect to direct end users to a specified location in an application when they enter a specified search term or terms. This enables you to display a relevant promotional page or product category page instead of a typical list of search results.

A keyword redirect triggers on one or more search terms; the target of a keyword redirect is a URL in your application. For example, a keyword redirect with the search term "delivery" and the URL `http://shipping.acme.com` redirects an end user to `http://shipping.acme.com` if they use "delivery" as a search term.

Multiple keyword entries

You can set multiple sets of keyword triggers for the same destination URL in your application. Each set of trigger terms has an associated match mode that determines what is a "match" for that specific trigger. If an end user's search query qualifies as a match for any of the keyword triggers for a URL, the user is redirected to that URL.

For a description of the different match modes, see "Adding a keyword redirect to your application."

Creating a keyword redirect

You can add keyword redirects to your application in the **Keyword Redirects** page in Workbench.

You can configure multiple keywords that trigger a redirect to the same location.

To create a keyword redirect:

1. Log in to Workbench.
2. Select **Keyword Redirects**.
3. Click **Add Redirect**.
The **Add Keyword Redirect** panel appears.
4. Enter an absolute or relative link in the **Redirect Link** field.

5. Enter a search term or terms in the **User Search Terms** field.
6. Select a match mode from the dropdown:
 - **Match Phrase** — Default. A search query triggers a redirect if the search terms match in the specified trigger terms in the same order. The search query may include additional terms before or after the trigger terms.
 - **Match All** — A search query triggers a redirect if the search terms include all of the specified trigger terms, but not necessarily in the same order.
 - **Match Exact** — A search query triggers a redirect only if the search terms exactly match the specified trigger terms, in the same order, with no additional terms.
7. (Optional) Click the **Add Another** button and repeat Steps 5-6 to create additional search term triggers for the specified URI.
8. Click **Save**.
Each search term trigger appears in its own row in the **Keyword Redirects** table.

Modifying keyword redirects

You can modify existing keyword redirects to change the keyword trigger(s) or destination URL.

To modify a keyword redirect:

1. Log in to Workbench.
2. Select **Keyword Redirects**.
3. To modify a keyword redirect:
 - a) Locate the keyword redirect entry. You can use the **Find:** field to search for a specific set of user search terms or a destination URL.
 - b) Click the keyword trigger or the URL that you wish to modify.
The **Edit Keyword Redirects** dialog appears.
 - c) Modify the **Redirect Link** or **User Search Terms**.



Note: When you select a keyword trigger in the table rather than a destination URL, the **Edit Keyword Redirects** dialog is limited to options that modify the selected keyword.

4. Click **Save**.

Deleting a keyword redirect

You can sort, search, and delete keyword redirects from the **Keyword Redirects** table.

You can sort keyword redirects in ascending or descending order according to the specified User Search Terms, Match Mode, Redirect Link, or Last Modified Date by clicking the corresponding column header in the **Keyword Redirects** table. Paging controls are located at the bottom of the page.

To delete a keyword redirect entry:

1. Log in to Workbench.
2. Select **Keyword Redirects**.
3. To delete a specific keyword redirect:

- a) Locate the entry you wish to remove. You can use the **Find:** field to search for a specific set of user search terms or a destination URL.
 - b) Click the **X** in the **Delete** column.
A confirmation dialog appears.
 - c) Click **Delete**.
The keyword redirect entry is removed.
4. To delete a keyword trigger from a URL with multiple keyword triggers:
 - a) Locate the URL you wish to remove. You can use the **Find:** field to search for it.
 - b) Click the URL in the **Redirect Link** column.
The **Edit Keyword Redirects** dialog appears.
 - c) In the **User Search Terms** list, scroll to the keyword trigger you wish to remove and click the **X**.
The keyword trigger is removed.
 - d) Click **Save**.
5. To delete all keyword redirects to a specific URL:
 - a) Locate the URL you wish to remove. You can use the **Find:** field to search for it.
 - b) Click the URL in the **Redirect Link** column.
The **Edit Keyword Redirects** dialog appears.
 - c) Click **Delete All**.
A confirmation dialog appears.
 - d) Click **Delete All**.
All entries for the specified URL are removed.

Working with Thesaurus Entries

This section introduces the **Thesaurus** page of Oracle Endeca Workbench and describes how to create, manage, and troubleshoot thesaurus entries.

About the Thesaurus

Thesaurus entries provide a means to account for alternate forms of a user's query.

You can open the **Thesaurus** page from **Search Tools** on the application **Home** page. On the **Thesaurus** page, you create the synonyms that capture other ways of expressing queries relevant to your application. These entries provide concept-level mappings between words and phrases.

You can add two kinds of entries to your thesaurus:

- One-way thesaurus entries establish an equivalence between words or phrases that applies in a single direction only. For example, you could define a one-way mapping so that all queries for computer would also return matches containing laptop, but queries for laptop would not return results for the more general computer. You can add an unlimited number of synonyms to a one-way entry, and the application expands the query to search for each search term with the same one-way relationship.
- Multi-way thesaurus entries establish a mutual equivalence relationship between words or phrases. For example, an equivalence might specify that the phrase notebook is interchangeable with the phrase laptop.

Creating one-way thesaurus entries

You create one-way thesaurus entries on the **Thesaurus** page of Oracle Endeca Workbench.

To create a one-way thesaurus entry:

1. On **Thesaurus** page, select **One-Way** in the **Type** field of the top entry row.
2. In the **Source** field, type the source term in the first field.
3. Enter a synonym for the source term in the **Synonyms** text box. Separate multiple synonyms with commas.
4. Click **Add Entry**.

Creating multi-way thesaurus entries

You create multi-way thesaurus entries on the **Thesaurus** page of Oracle Endeca Workbench.

To create a multi-way thesaurus entry:

1. On **Thesaurus** page, select **Multi-Way** in the **Type** field of the top entry row.
2. Leave **User Search Terms** blank.
3. Enter a word or phrase in the **Synonyms** field. Separate multiple synonyms with commas.
You can create an unlimited number of synonyms for a single thesaurus entry.
4. Click **Add Entry**.

Editing thesaurus entries

You can revise your thesaurus entries as you gain a better understanding of the search terms that users are entering.

To edit an entry:

1. On the **Thesaurus** page, click the synonyms for the entry that you want to modify.
2. Change the entry type or the search term, or add, remove, or change synonyms.
3. Click **Save**.

Searching for thesaurus entries

You can search for thesaurus entries by entering all or part of an entry.

For example, suppose you want to locate synonyms you previously associated with "US." You search for "us" and see an entry with the synonyms "american, united states, us." You can search by word, partial word, or letter. Oracle Endeca Workbench uses an implied wildcard to find entries. For example, searching for "u" is equivalent to searching for "*u*". All entries containing "u" display. Oracle Endeca Workbench is case insensitive when finding thesaurus entries.

To find thesaurus entries:

1. On the **Thesaurus** page, enter a term or character in the **Find** field.
2. Click **Find**.
3. To clear your results, click **Show All** on the **Thesaurus** page.

Deleting thesaurus entries

You can delete thesaurus entries that are no longer needed.

To delete thesaurus entries:

1. On the **Thesaurus** page, click the **Delete** box for the entry you want to remove. You can select multiple entries to delete.
2. Click **Delete Selected**.

Thesaurus tips

The thesaurus feature is very powerful, but poorly conceived entries can tax your application without providing additional utility.

To maximize the potential of this feature, keep the following suggestions in mind:

- Do not create a multi-way thesaurus entry for a word with multiple meanings.

For example, khaki can refer to a color as well as to a style of pants. If you create a multi-way thesaurus entry for khaki = pants, then a user's search for khaki towels could return irrelevant results for pants.

- Do not create a multi-way thesaurus entry between a general and several more-specific terms, such as top = shirt = sweater = vest. This increases the number of results the user has to go through while reducing the overall accuracy of the items returned.

In this instance, better results are attained by creating individual one-way thesaurus entries between the general term top and each of the more-specific terms.

- A thesaurus entry should never include a term that is a substring of another term in the entry. For example, consider a multi-way equivalency between "tackle" and "bait and tackle."

If users type "tackle," they get results for "tackle" or "bait and tackle" (that is, the same results they would have gotten for "tackle" without the thesaurus). If users type "bait and tackle," they get results for "bait and tackle" or "tackle," causing the "bait and" part of the query to be ignored.

- Stop words such as "and" or "the" should not be used in single-word thesaurus forms.

For example, if "the" has been configured as a stop word, an equivalency between "thee" and "the" is not useful.

You can use stop words in multi-word thesaurus forms, because multi-word thesaurus forms are handled as phrases. In phrases, a stop word is treated as a literal word and not a stop word.

- Avoid multi-word thesaurus forms where single-word forms are appropriate.

In particular, avoid multi-word forms that are not phrases that users are likely to type, or to which phrase expansion is likely to provide relevant additional results. For example, the multi-way thesaurus entry "Aethelstan, King Of England (D. 939)" = "Athelstan, King Of England (D. 939)" should be replaced with the single-word form "Aethelstan" = "Athelstan."

- Thesaurus forms should not use non-searchable characters.

For example, the multi-way thesaurus entry Pikes Peak = Pike's Peak should only be used if apostrophe (') is enabled as a search character. To add a search character, contact an Endeca Developer Studio user at your site.

- Avoid using thesaurus entries for common spelling corrections. The software fixes misspellings automatically.

Chapter 6

Working with Reports

This section introduces Oracle Endeca Workbench reports and explains how to view them.

About reports

The **Reports** tool allows you to look at what has happened on your site over the last day or week.

Depending on how **Reports** is configured, you can answer questions like these:

- How much traffic is my site getting?
- How are visitors searching and browsing the site?
- How effective are their searching and browsing techniques?

Depending upon how **Reports** is configured, it can display today's report, a single daily or weekly report, or allow you to browse and view historical report archives.

Scheduling reports

In order to enable Oracle Endeca Workbench to display reports on the **Reports** page, you must configure report generation.

Daily reports run from 12 a.m. to 11:59:59 p.m. Weekly reports also begin at 12 a.m. and you can specify the day that begins a weekly report. For example, your weekly report can run from 12 a.m. on Monday to 11:59:59 p.m. on the following Sunday.

To enable Workbench to display reports on the **Reports** page:

1. Open the **Report Scheduler** page from **Applications Settings** on the application **Home** page.
2. Check one or both of the following:
 - Check **Schedule Daily Reports** if you want reports generated once a day.
 - Check **Schedule Weekly Reports** if you want reports generated weekly. Then select the day of the week from the drop-down list, to indicate on which day of the week you want your reports to be generated.
3. Click **Save Changes**.

Viewing reports

The reports that are visible to you depend upon how Oracle Endeca Workbench is configured. If you need to include or exclude different reports or reporting information, or if reporting information does not appear, contact your technical team.

You need permission to access the **Reports** tool.

To view reports in Oracle Endeca Workbench:

1. Locate the **Reports** tool on your application **Home** page in Workbench.
2. Click one of the following links:
 - **Today's Reports** displays the latest information available.
 - **Daily Reports** displays a list of archived daily reports. Click any date in the list to display the corresponding report.
 - **Weekly Reports** displays a list of archived weekly reports by date. Click any date in the list to display the corresponding report.

Appendix A

About the Reference Application Cartridges

The Discover Electronics reference application is provided as an example of an Assembler application that displays content to users across multiple channels. This chapter provides a list of the available cartridges and describes how to configure them in Experience Manager.

About the included cartridges

The Tools and Frameworks package installs with a set of Experience Manager cartridges for use with the Discover Electronics reference application.

An Experience Manager cartridge provides an editing interface that allows a content administrator to configure how and where content displays to users.

Content can be configured within a page section, or within a standalone unit that displays in an available slot on a page when trigger conditions are met. The triggers and content for a dynamic slot are managed independently of the content item that contains them.

Search cartridges

- Search Box
- Dimension Search Auto-Suggest
- Dimension Search Results
- Search Adjustments

Guided Navigation cartridges

- Breadcrumbs
- Dimension Navigation
- Navigation Container

Results cartridges

- Results List

Record details cartridges

- Record Details Page

Content and spotlighting cartridges

- Media Banner
- Record Spotlight
- Horizontal Record Spotlight

Experience Manager supports the development of custom cartridges for extending the functionality available to business users. For more information, see the *Oracle Endeca Experience Manager Extension Guide*.

About cartridge dialogs

Several of the core cartridges included with Tools and Frameworks launch dialog boxes as a configuration interface. This section describes dialogs common to multiple core cartridges.

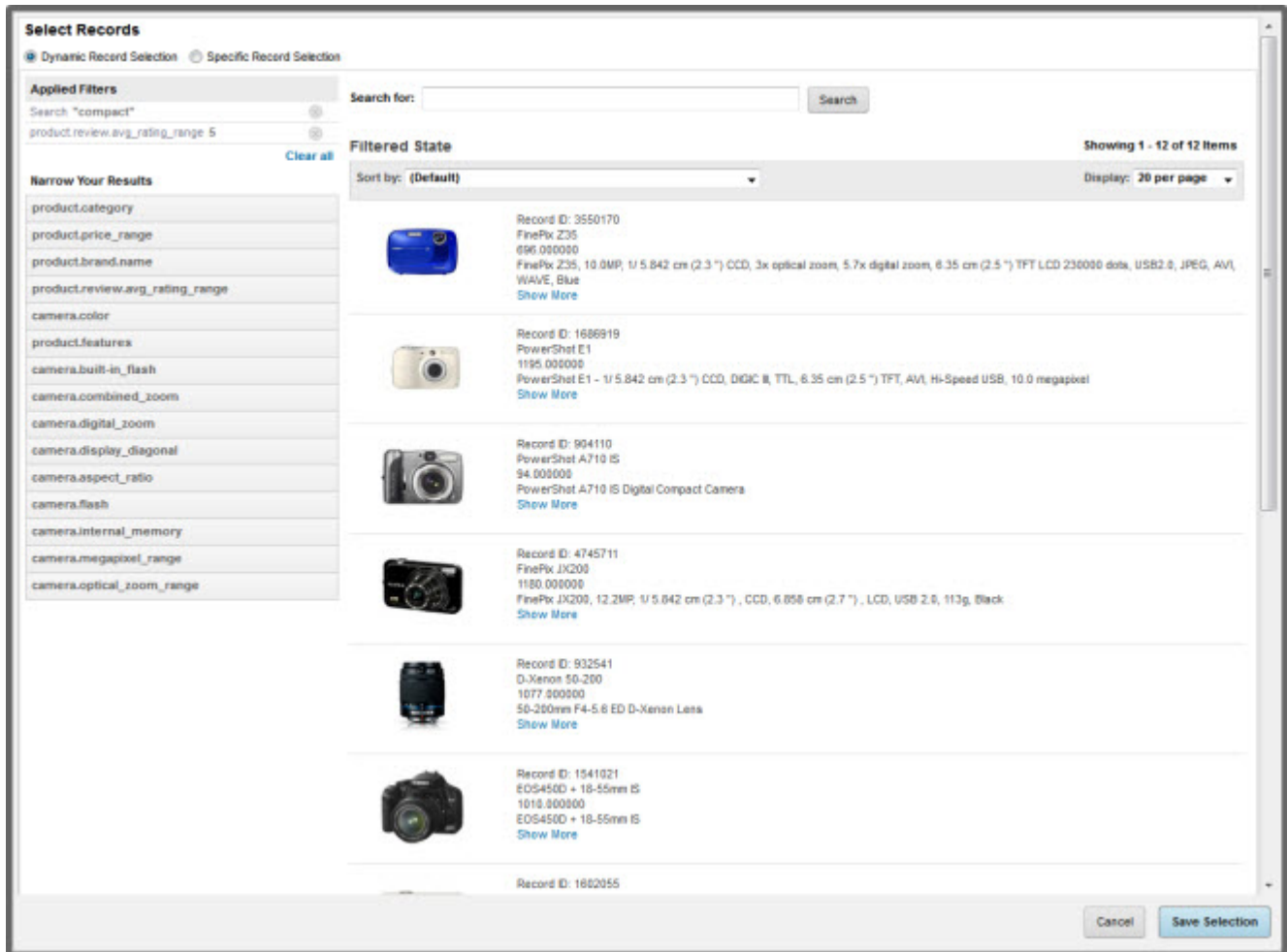
About the Select Records dialog

The **Select Records** dialog provides traditional search and Guided Navigation within Experience Manager. Several cartridges, such as the Results List and Record Spotlight cartridges, use it as a means of selecting featured or dynamic records.

You can use the dialog to specify a navigation state within your application, or a list of specific records, without needing to know the record IDs within your application data set.

Dynamic Record Selection

In **Dynamic Record Selection** mode, you select dimension refinements and search terms that correspond to the navigation state you wish to highlight. For example, if you are creating a "Top-Rated Products" banner that specifically highlights compact cameras, you might enter the search term "compact" and limit results to those tagged with the `product.review.avg_rating_range 5` dimension:



The user interface includes the following controls:

- **Search for** field – The **Search for:** field lets you enter search terms to either define a navigation state or just to browse through the data set. Selected search terms display in the **Applied Filters** pane.

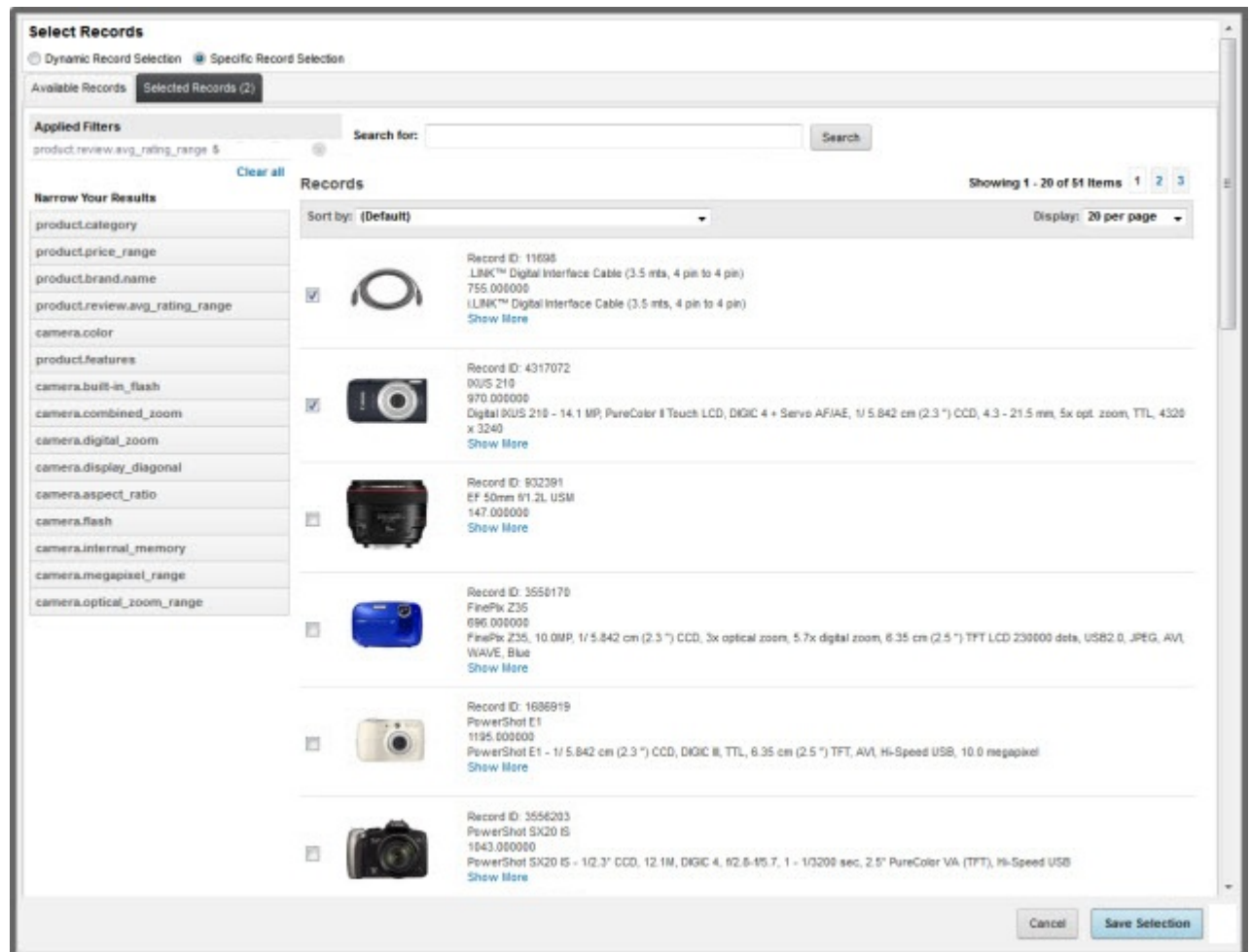


Note: The **Search for:** field is typeahead enabled.

- **Narrow Your Results** pane – You can select dimension refinements in addition to or instead of search terms to define a navigation state. Selected refinements display in the **Applied Filters** pane.
- **Applied Filters** pane – Once selected, dimension refinements and search terms are displayed here. You can click the **X** beside each refinement or term to remove it individually, or click the **Clear all** link to clear all refinements.
- **Sort by:** drop-down – You can sort results based on an MDEX Engine dimension or property value.
- **Filtered State** pane – This pane provides a preview of the records that match the selected filter state, although the exact records that display to the end user may change due to updates in the data set.
- **Display:** drop-down – The **Display:** drop-down and pagination controls in the upper-right allow you to browse matching records page by page.

Specific Record Selection

In **Specific Record Selection** mode, the **Filtered State** pane becomes the **Records** pane, which features checkboxes that allow you to select specific records from your navigation state:



Note: In the Link Builder editor, the checkboxes are replaced with radio buttons since you can only link to a single record.





You can view selected records by switching to the **Selected Records** tab:

Select Records

☐ Dynamic Record Selection
 ☒ Specific Record Selection

Available Records Selected Records (2)

To change the order of selected items, adjust order numbers. Clear All

Order	Image	Spec	product.name	product.price	product.short_desc	Remove
1		11698	i.LINK™ Digital Interface Cable (3.5 mts, 4 pin to 4 pin)	755.000000	i.LINK™ Digital Interface Cable (3.5 mts, 4 pin to 4 pin)	
2		4317072	DXS 210	970.000000	Digital DXS 210 - 14.1 MP, PureColor II Touch LCD, DIGIC 4 + Servo AF/AE, 1/5.842 cm (2.3") CCD, 4.3 - 21.5 mm, 5x opt. zoom, TTL, 4320 x 3240	

Cancel Save Selection

To re-order these results, enter a new value in the **Order** column for the corresponding records. Results are ordered lowest to highest; a record with an **Order** value of 1 will show up before a record with an **Order** value of 2.

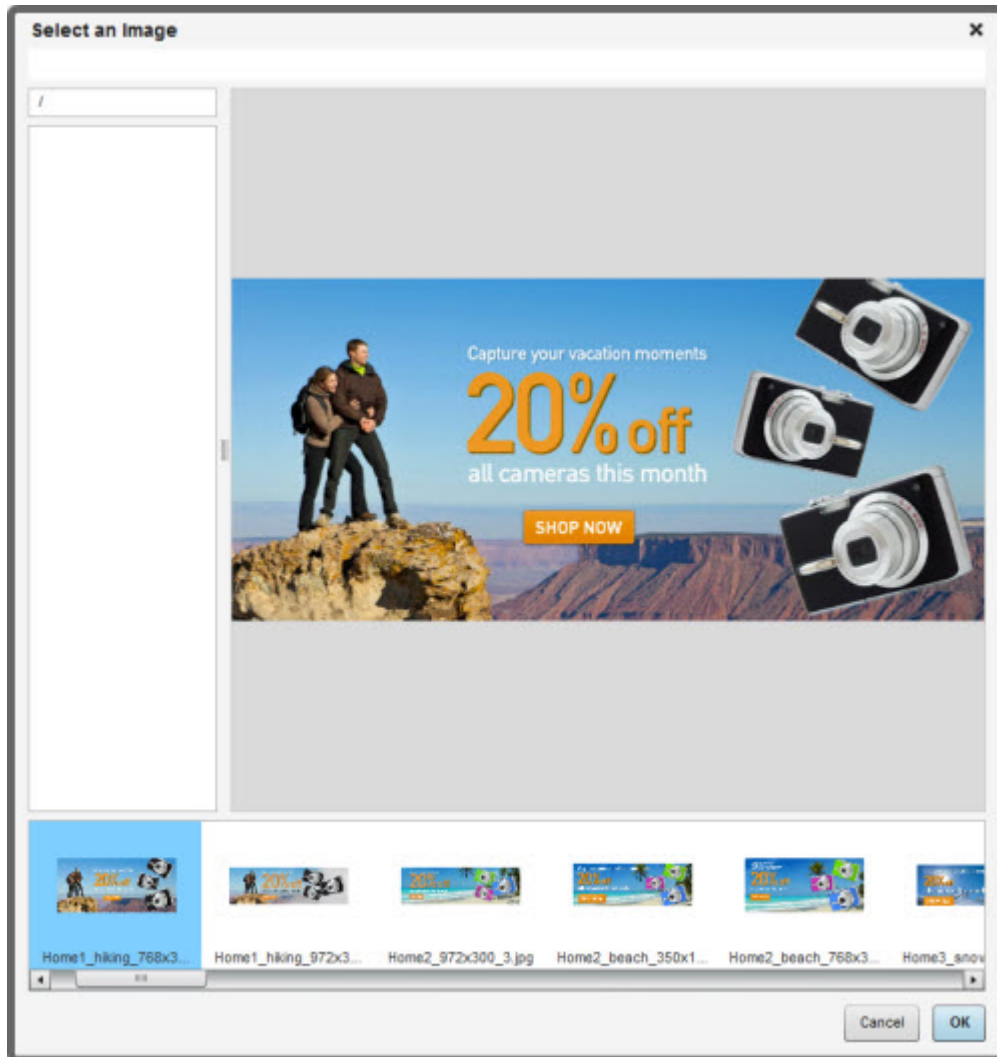
You can remove selected records by clicking the corresponding **X** in the **Remove** column, or you can click the **Clear All** button to remove all selected records.

About the Select an Image dialog

The **Select an Image** dialog allows you to link media resources into your cartridges.

You can preview images and video in the dialog before adding the associated resource to a cartridge.

The dialog is shown below in Experience Manager:



The Experience Manager editor that launches the **Select an Image** dialog is shown below:



Search cartridges

Search cartridges enable basic and advanced keyword search functionality in an application.

The Search Box cartridge

The Search Box cartridge provides site visitors with an interface for using keyword search in an application. You can also configure the cartridge to display auto-suggest results.

The Search Box cartridge for the Discover Electronics reference application is shown below:



If you have enabled auto-suggest search results, they display when the keyword search reaches the specified minimum number of matching characters. These auto-suggest results provide potential search matches that assist site users in rapidly navigating your application and finding the content they need.

Configuring the Search Box cartridge

The Search Box cartridge includes configuration options for triggering an auto-suggest panel:

Auto-Suggest Configuration	
Content Type	AutoSuggestPanel
Content Collection	<input type="text" value="/content/Shared/Auto-Suggest Panels"/> View
Rule Limit	<input type="text" value="1"/>
Minimum Characters	<input type="text" value="3"/>



Note: You must create and configure the auto-suggest panel separately.

Content Collection — A Content Collection that takes Content Items of type `AutoSuggestPanel`. Click the **View** link to navigate away from the current cartridge and view the selected collection.

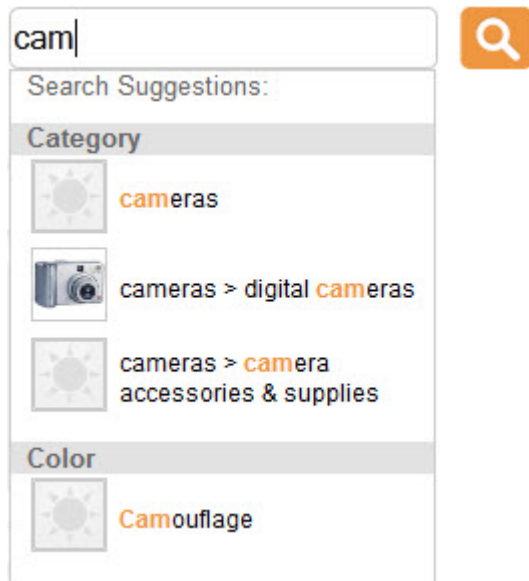
Rule Limit — The number of `AutoSuggestPanel` content items to return.

Minimum Characters — The number of characters the end user must enter before the auto-suggest panel appears. The minimum and maximum acceptable values are set by your Application Developer in the cartridge template.

Adding an auto-suggest panel

Auto-suggest results display in a drop-down panel on the current page, rather than as a separate page. You must create an auto-suggest panel before you can add any auto-suggest cartridges to it.

The Search Box cartridge triggers an auto-suggest panel when the end user's search query reaches a specific character length. Auto-suggest results display as a drop-down list beneath the Search Box on the current page, as shown in the example below:



To add an auto-suggest panel:

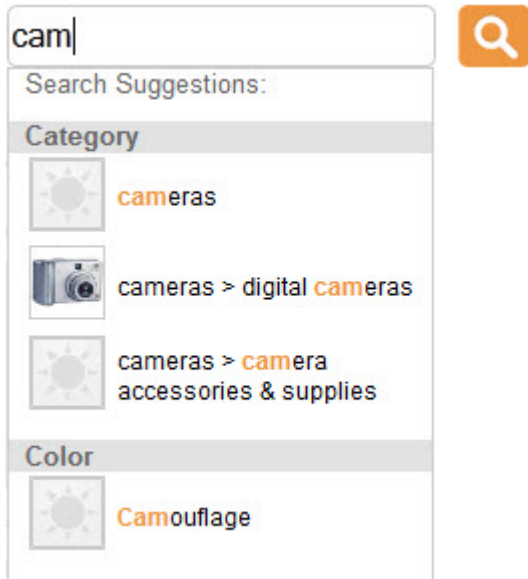
1. In the Experience Manager **Collection View**, select the collection that contains your auto-suggest content.
In the Discover Electronics reference application, this is the **Shared > Auto-Suggest Panels** collection.
2. Click **New AutoSuggestPanel**.
3. Set the page template:
 - a) Click **Select Template**.
 - b) Select the **AutoSuggestPanel** template.
 - c) Click **OK**.
4. In the Content Tree, select **autoSuggest**.
5. In the Content Details Panel, **Add** an auto-suggest cartridge, such as **DimensionSearchAutoSuggestItem**.
6. Click **OK** to save your changes and return to the **Content Item List View**.

The Dimension Search Auto-Suggest cartridge

The Dimension Search Auto-Suggest cartridge populates the auto-suggest panel with a list of dimension values based on the current search query.

Auto-suggest dimension results display dimension values related to an end user's search query. This allows the user to quickly narrow a search to dimensions most likely to return the desired results.

An example of the Dimension Search Auto-Suggest cartridge is shown below in the Discover Electronics sample application:



Related Links

[The Dimension Search Results cartridge](#) on page 94

The Dimension Search Results cartridge displays dimension values that match the site visitor's keyword search query. Unlike the Dimension Search Auto-Suggest cartridge, these results display as part of a page after the site visitor presses ENTER in the Search Box or clicks the search button.

About configuring the Dimension Search Auto-Suggest cartridge

You can configure the appearance of the auto-suggest panel by selecting which dimensions to check for matching dimension values, and what order they display in.

The cartridge configuration interface is shown below in the Content Details Panel in Experience Manager:

Display Settings		
Title	<input type="text" value="Search Suggestions:"/>	
Display Image	<input checked="" type="checkbox"/>	
Max Search Suggestions	<input type="text" value="8"/>	
Show Refinement Counts	<input type="checkbox"/>	
Search Configuration		
Dimensions Searched	Available Dimensions	Selected
	<div> <div>camera.display_diagonal</div> <div>camera.aspect_ratio</div> <div>common.record_type</div> <div>trigger.page_type</div> <div>trigger.paging_offset</div> </div>	<div> <div>product.brand.name</div> <div>product.category</div> <div>product.price_range</div> <div>product.features</div> <div>camera.color</div> <div>camera.digital_zoom</div> <div>product.review.avg_rating_range</div> </div>
	<div> <div>>></div> <div>></div> <div><</div> <div><<</div> </div>	
	<div>Note: If no dimensions are selected, then all dimensions will be included</div>	
Max entries / dimension	<input type="text" value="3"/>	

The **Display Settings** controls affect how auto-suggest dimension results are displayed to the site user:

- **Title** — (Optional) You can add a title to the dimension search section of the auto-suggest panel.
- **Display Image** — Specify whether the image associated with a dimension value displays next to the name of the dimension search result. The application developer configures the scaling and positioning of these images.
- **Max Search Suggestions** — Limit the total number of dimension results displayed in the auto-suggest panel.
- **Show Refinement Counts** — Specify whether to display the number of records associated with each dimension search result.

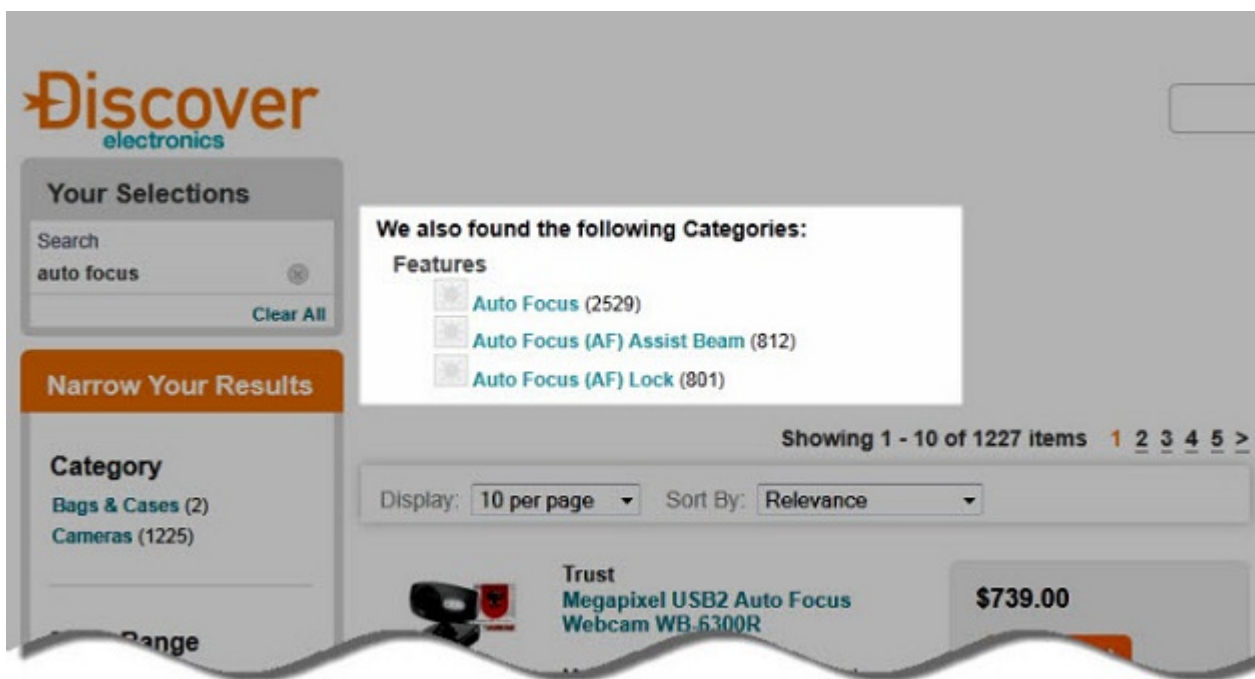
Use the **Search Configuration** controls to configure which dimensions to check for dimension values that match the user's current keyword search:

- **Dimensions Searched** — Drag dimensions from the **Available Dimensions** pane to the **Selected** pane to include them in auto-suggest results. The **Remove All** link clears the list of selected dimensions.
- **Selected** — Displays selected dimensions. Re-order the list to adjust the order in which auto-suggest results display to the user.
- **Max entries / dimension** — Limit the number of search results returned for each dimension.

The Dimension Search Results cartridge

The Dimension Search Results cartridge displays dimension values that match the site visitor's keyword search query. Unlike the Dimension Search Auto-Suggest cartridge, these results display as part of a page after the site visitor presses ENTER in the Search Box or clicks the search button.

Dimension search results are shown below in the Discover Electronics reference application:



Note that the cartridge does not display in the application if the site visitor never uses keyword search. Additionally, if the visitor refines a keyword search by selecting navigation refinements, dimension search matches no longer display.

Configuring the Dimension Search Results cartridge

The cartridge configuration interface is shown below in the Content Details Panel in Experience Manager:

The screenshot displays the configuration interface for a search cartridge, divided into two main sections: **Display Settings** and **Search Configuration**.

Display Settings:

- Title:** A text input field containing the placeholder text "We also found the following Categories:".
- Display Image:** A checkbox that is currently checked.
- Max Search Suggestions:** A numeric input field set to the value 8.
- Show Refinement Counts:** An unchecked checkbox.

Search Configuration:

This section is divided into three panes:

- Dimensions Searched:** This pane is currently empty.
- Available Dimensions:** A list of dimensions that can be selected, including:
 - camera.built-in_flash
 - camera.combined_zoom
 - camera.display_diagonal
 - camera.aspect_ratio
 - common.record_type
 - trigger.page_type
 - trigger.paging_offset
- Selected:** A list of dimensions that have been selected for searching, including:
 - product.category
 - product.brand.name
 - camera.color
 - product.price_range
 - product.features
 - product.review.avg_rating_range
 - camera.flash

Navigation buttons (">>>", ">", "<", "<<") are located between the Available and Selected panes. A note below the panes states: "Note: If no dimensions are selected, then all dimensions will be included".

At the bottom left, there is a **Max entries / dimension** input field set to the value 3.

The cartridge configuration options are similar to those used in the Dimension Search Auto-Suggest cartridge.

The **Display Settings** controls affect how auto-suggest dimension results are displayed to the site visitor:

- **Title** — Enter the text string that should appear above the list of dimension search results.
- **Display Image** — Specify whether the image associated with a dimension value displays next to the name of the dimension search result. Your application developer configures the scaling and positioning of these images.
- **Max Search Suggestions** — Limit the total number of dimension results displayed in the list of results.
- **Show Refinement Counts** — Specify whether to display the number of records associated with each dimension search result.

Use the **Search Configuration** controls to configure which dimensions to check for dimension values that match the current keyword search:

- **Dimensions Searched** — Drag dimensions from the **Available Dimensions** pane to the **Selected** pane to include them in auto-suggest results. The **Remove All** link clears the list of selected dimensions.
- **Selected** — Displays selected dimensions. Re-order the list to adjust the order in which auto-suggest results display to the user.
- **Max entries / dimension** — Limit the number of search results returned for each dimension.

Best Practices

Dimension search results provide an alternative to the Dimension Search Auto-Suggest cartridge when displaying related dimension values to a site user. Oracle recommends selecting one of the two approaches and maintaining that selection consistently across your application. The Discover Electronics

reference application enables both the Dimension Search Results cartridge and the Dimension Search Auto-Suggest cartridge for demonstration purposes.

Related Links

[The Dimension Search Auto-Suggest cartridge](#) on page 92

The Dimension Search Auto-Suggest cartridge populates the auto-suggest panel with a list of dimension values based on the current search query.

The Search Adjustments cartridge

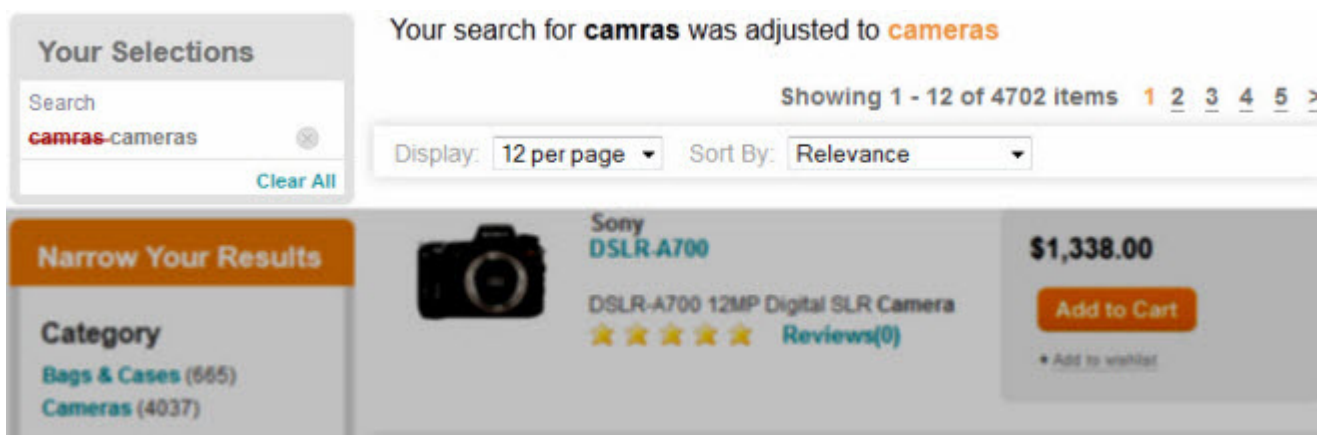
The Search Adjustments cartridge can be added to a results page to notify the site visitor when a keyword search is automatically corrected, or to offer alternative search suggestions.

Search adjustments help site visitors quickly locate the content they are searching for. They provide alternate navigation to what would otherwise result in a limited or empty set of results. Search adjustments include:

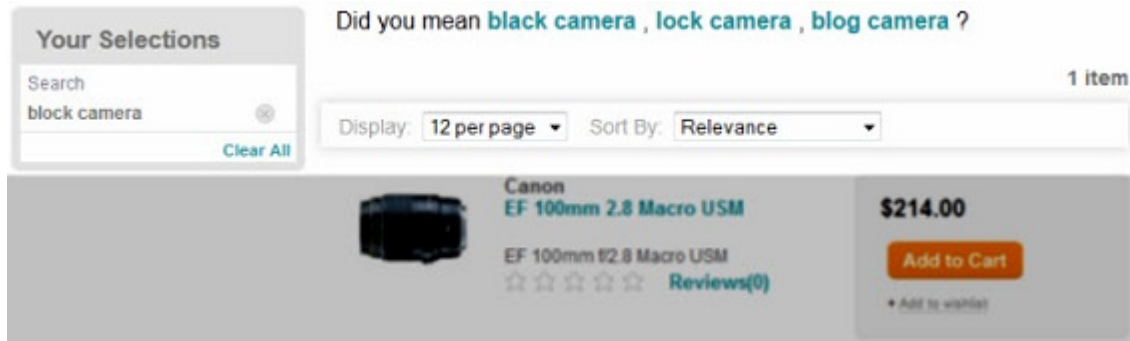
- **Auto-correct** takes effect when there are few or no results for the user's keyword search and a similar term exists in the data.
- **Automatic phrasing** treats certain predefined combinations of search terms as a phrase search instead of individual keywords.
- **Did You Mean (DYM)** displays either when results exist for the user's keyword search, but an alternative keyword search produces significantly more search results. Did You Mean can also be used in conjunction with automatic phrasing (to offer the site visitor the choice of using either the phrased or unphrased version of the search).

The exact threshold at which auto-correct or DYM results display depends on configuration set by your application developer.

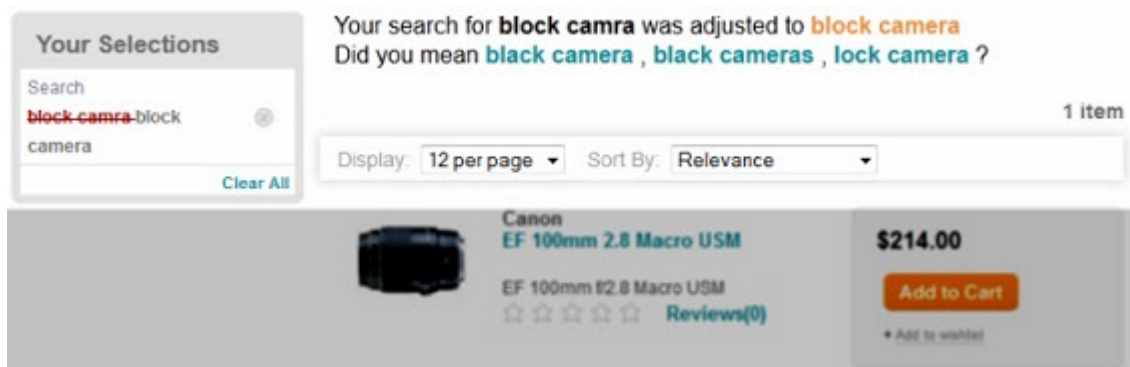
For example, if the site visitor searches for "camras," the search term is auto-corrected to "cameras." A message displays that the search was corrected to "cameras," and keyword search results display for "cameras":



If the site visitor searches for "block camera," they receive a message asking if they meant "black camera," "lock camera," or "blog camera." Each option is presented as a link to the keyword search results for the relevant phrase:



If the site visitor searches for "block camra," "camra" is auto-corrected and "Did You Mean" suggestions display for "block." A message displays that the search was corrected, and keyword search results display for "block camera":



Note: The spelling correction and Did You Mean features are enabled and configured by your application developer; these application settings apply to all pages on your site regardless of whether you have added the Search Adjustments cartridge. You should work with your technical team to ensure the proper behavior of search adjustments.

Configuring the Search Adjustments cartridge

Except for naming the cartridge in Experience Manager, the presentation and wording of messages in the Search Adjustments cartridge is configured by your application developer.

Guided Navigation cartridges

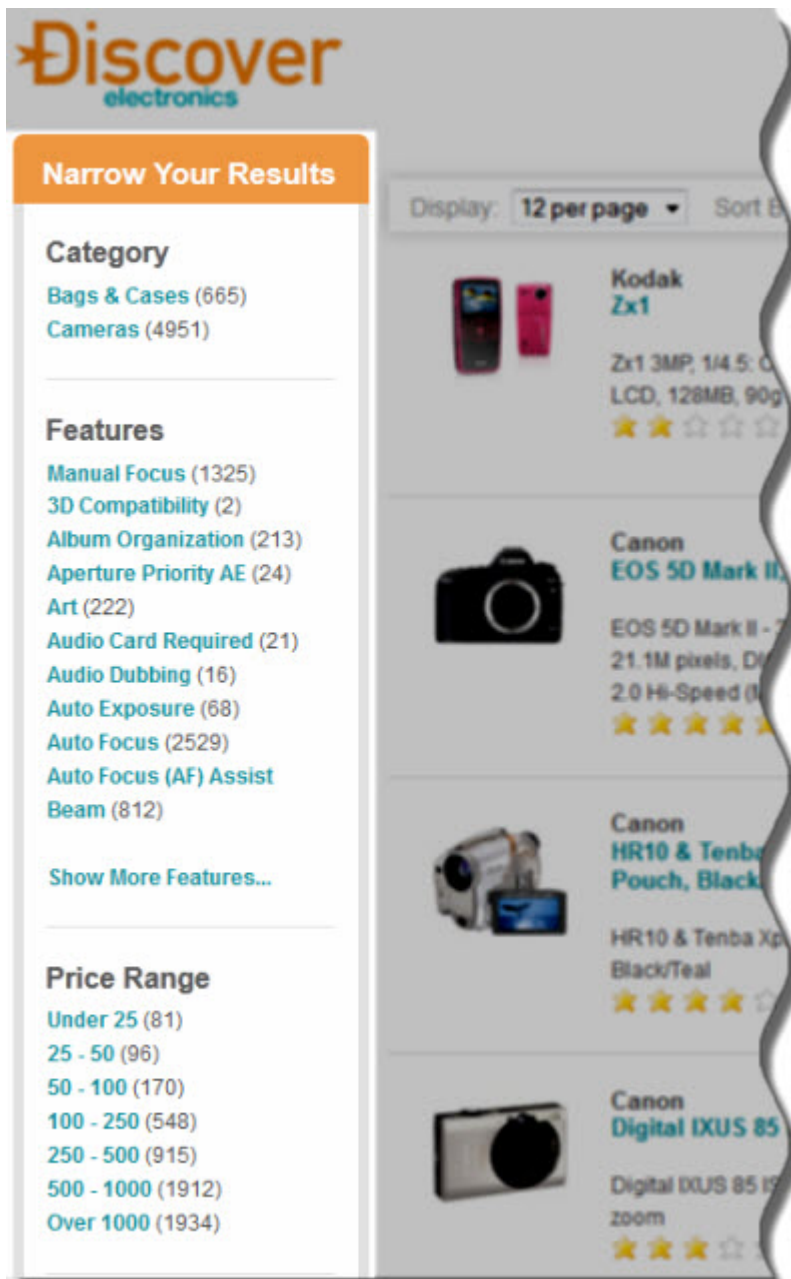
Guided Navigation cartridges provide a means of configuring Guided Navigation in an application.

The Dimension Navigation cartridge

The Dimension Navigation cartridge displays dimension refinements for Guided Navigation. Additionally, you can configure it to boost or bury selected refinements.

As the name implies, the Dimension Navigation cartridge displays dimension refinements for non-hierarchical dimensions. These results can be ordered by sorting, relevance ranking, or through explicitly boosting or burying selected dimension refinements.

An example of the Dimension Navigation cartridge is shown below in the Discover Electronics reference application:



This layout uses multiple Dimension Navigation cartridges for the left column Guided Navigation interface. Note that the **Features** dimension has the **'More'** link enabled, while the **Price Range** dimension does not require it.



Note: The Dimension Navigation cartridge does not support hierarchical dimensions.

Configuring the Dimension Navigation cartridge

The cartridge configuration interface is shown below in the Content Details Panel in Experience Manager:

Section Settings	
Section Type	Navigation
Navigation	RefinementMenu - Features x Change
Name	Features
Dimension Name	product.features ▼
Refinement Menu Order	
Sorting Options	Dimension Default ▼
Boost and Bury	
Boosted Remove All	Available Refinements Buried Remove All
Manual focus	<div>search</div> <div> 3D compatibility Album organization Aperture priority AE Art Audio card required Audio dubbing Auto exposure </div>
Refinement Menu Size	
Max. Refinements	10 ▼
More Link	
Enable 'Show More' Link	<input checked="" type="checkbox"/>
'Show More' Link Text	Show More Features...
'Show Less' Link Text	Show Less Features...
'More' Max. Refinements	200 ▼

The **Section Settings** controls affect general settings for the cartridge. In addition to modifying the cartridge name in Experience Manager, you must use the **Dimension Name** drop-down to set the dimension for navigation.

The **Refinement Menu Order** controls determine the order in which results display to the end user.

- **Sorting Options** — Select how dimension refinements are sorted. By default, this is set to **Dimension Default**, the configuration defined for the application by your application developer.
- **Boost and Bury** — Once you have selected a dimension, you can drag dimension refinements to the **Boosted** or **Buried** lists to override their default position in the sorting order. For more details, see "Configuring dimension boost and bury in the Dimension Navigation cartridge."

The **Refinement Menu Size** controls determine size of the refinement menu.

- **Max. Refinements** — Select how many dimension refinements should display.

The **More Link** controls let you set the text of the "More results" link and the maximum number of refinements that should display when it is clicked.

- **Enable 'Show More' link** — Enable or disable the **'Show More'** link in the application. This enables you to limit the number of results initially shown to the end user, while still allowing them to display additional dimension refinements if they so choose.

If the total number of dimension refinements is less than the value specified in **'More' Max. Refinements**, the **'Show More'** link does not display.

- **'Show More' Link Text** — Specify the text of the **'Show More'** link here.
- **'Show Less' Link Text** — Specify the text of the **'Show Less'** link here.
- **'More' Max. Refinements** — Set the maximum number of refinements displayed after the **'More'** link is selected in the Web application.

Best practices for the Dimension Navigation cartridge

If a cartridge requires a "Show More" link, consider setting the **Sorting Options** to **Frequency (Dynamic Ranking)** so that the most common dimension refinements are displayed first.

Related Links

[Configuring dimension boost and bury in the Dimension Navigation cartridge](#) on page 101

You can configure the Dimension Navigation cartridge to boost or bury selected dimension refinements in the displayed results set. This overrides their default position in the sorting order.

Configuring dimension boost and bury in the Dimension Navigation cartridge

You can configure the Dimension Navigation cartridge to boost or bury selected dimension refinements in the displayed results set. This overrides their default position in the sorting order.

To boost or bury dimensions in the Dimension Navigation cartridge in Experience Manager:

1. In the Experience Manager **Collection View**, select your Guided Navigation collection.
In the Discover Electronics reference application, this is the **Shared > Guided Navigation** collection.
2. Select the content item you wish to edit.
3. In the Content Tree, select the section where you wish to add or edit a Dimension Navigation cartridge.
4. In the Content Details Panel, **Add** a Dimension Navigation cartridge or select the Dimension Navigation cartridge you wish to edit.
5. Select the dimension that you wish to search for:
 - a) Click the **Dimension Name** field to see the drop-down list of available dimensions.
 - b) Type in the name of the desired dimension or select it from the drop-down list.

The **Boost and Bury** fields are enabled when a dimension is selected:

Section Settings

Section Type

Navigation

Navigation

DimensionNavigation ✖ Change

Name

Features

Dimension Name

product.features

Refinement Menu Order

Sorting Options

Static (Dynamic Ranking) ▼

Boost and Bury

Boosted

[Remove All](#)

Available Refinements

Buried

[Remove All](#)

Manual exposure

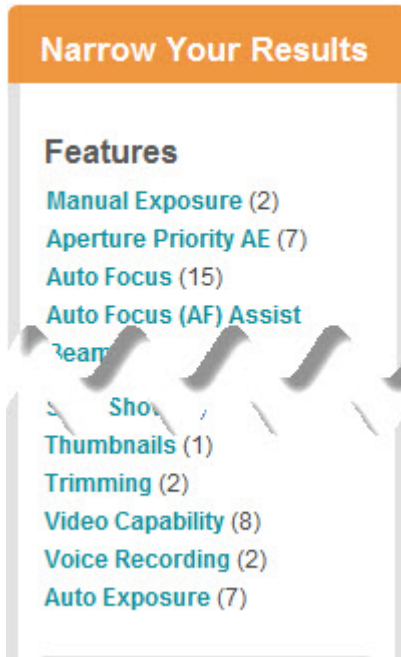
a

Auto focus
Auto Focus (AF) assist be
Auto Focus (AF) lock
Flash exposure lock
Art
Audio card required
Audio dubbing

Auto exposure

6. Select a sort type in the **Sorting Options** drop-down.
By default, it is set to **Dimension Default**, the configuration defined in Endeca Developer Studio.
The out-of-the-box template also allows you to sort dimensions in **Alphanumeric** order or **By frequency**. Additional drop-down options can be specified by your Application Developer in the cartridge template.
7. Configure boosted and buried refinements:
 - a) Select the dimension refinement that you wish to boost or bury from the **Available Refinements** list.
You can filter the displayed refinements by entering partial or full words in the above text box.
 - b) Drag the selected refinement to the **Boosted** or **Buried** list.
You can remove refinements from either list individually, or remove all refinements by clicking the associated **Remove All** link.
 - c) Repeat Steps 7a and 7b for each refinement that you wish to boost or bury.
 - d) (Optional) Drag and drop refinements in the **Boosted** and **Buried** lists to the exact order in which they should display in the application.
8. Click **OK** to save your changes and return to the **Content Item List View**.

Verify that your change took effect by navigating to the Discover Electronics reference application at <http://localhost:8006/discover-authoring>. Following the example configuration shown in Step 5b, Manual Exposure is boosted as a refinement, while Auto exposure is buried:



Related Links

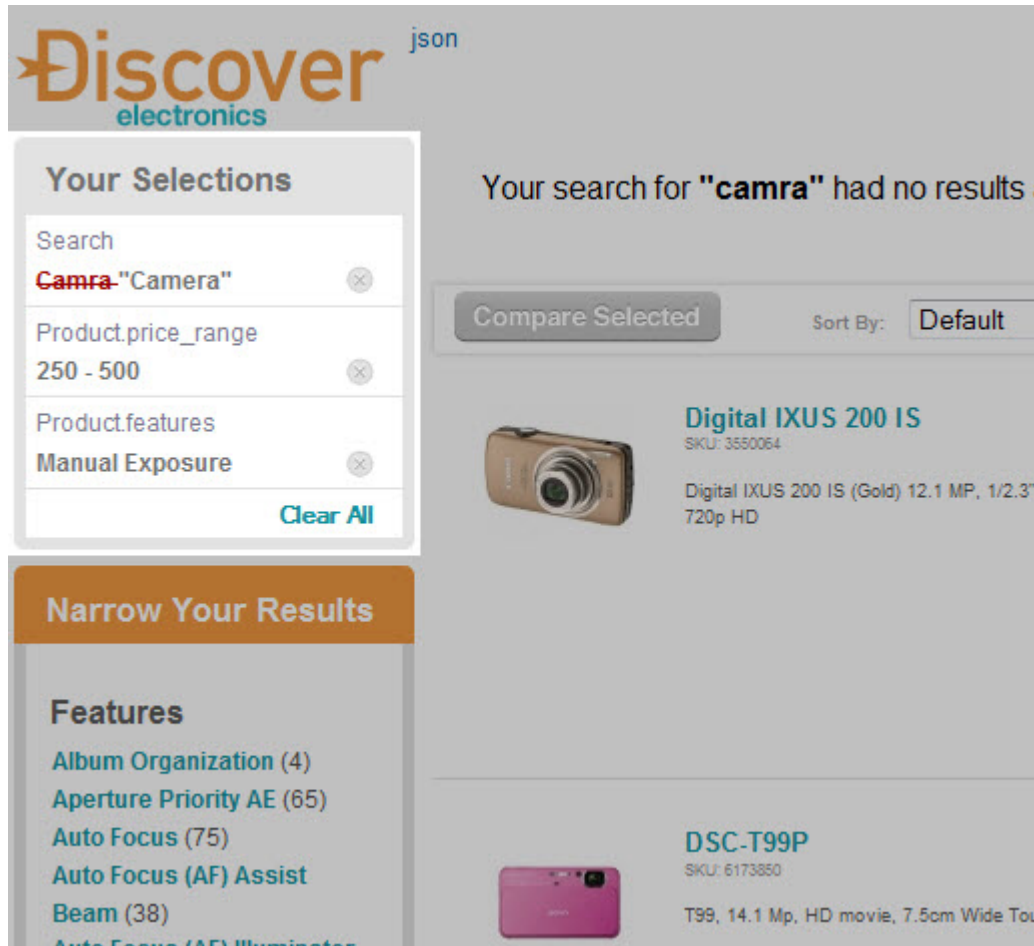
[The Dimension Navigation cartridge](#) on page 98

The Dimension Navigation cartridge displays dimension refinements for Guided Navigation. Additionally, you can configure it to boost or bury selected refinements.

The Breadcrumbs cartridge

The Breadcrumbs cartridge allows you to add navigation breadcrumbs to the sidebar of a page, so that the current navigation state is clearly visible to the end user. Users can clear refinements from the breadcrumbs individually or all at once.

The Breadcrumbs cartridge is highlighted below in the Discover Electronics reference application:



The cartridge displays selected dimensions and search terms. If your application supports auto-correct search results, they are shown with the initial term in strikethrough text and the auto-correct result beside it.

The end user can use the Breadcrumbs display to monitor their navigation state and can remove an individual refinement by clicking the associated **x** button. This sends a new query to the MDEX Engine with the updated navigation state.

Additionally, the end user can clear the navigation state entirely by clicking **Clear All**.

Configuring the Breadcrumbs cartridge

The Breadcrumbs cartridge does not require any configuration; only the display name in Experience Manager can be changed.

Results cartridges


Results cartridges allow you to configure how search and navigation results are displayed to users of your application.

The Results List cartridge

The Results List cartridge displays search and navigation results to site users. You can configure it to boost or bury selected records.


The results list is shown below in the Discover Electronics reference application:

Display: 12 per page ▼
Sort By: Relevance ▼




Kodak Zx1
Zx1 3MP, 1/4.5: CMOS, 5.08 cm (2.0 ") LCD, 128MB, 90g
☆☆☆☆ Reviews(0)

\$1,238.00
Add to Cart
+ Add to wishlist



Canon EOS 5D Mark II, Body
EOS 5D Mark II - 36x 24 mm CMOS, 21.1M pixels, DIGIC 4, 9-point AF, USB 2.0 Hi-Speed (Mini-B)
☆☆☆☆ Reviews(0)

\$264.00
Add to Cart
+ Add to wishlist



Canon HR10 & Tenba Xpress: Medium Pouch, Black/Teal
HR10 & Tenba Xpress: Medium Pouch, Black/Teal
☆☆☆☆ Reviews(0)

\$166.00
Add to Cart
+ Add to wishlist

Configuring the Results List cartridge

The cartridge configuration interface is shown below in the Content Details Panel in Experience Manager:

Section Settings	
Section Type	MainContent
Cartridge	ResultsList x Change
Name	Results List
Records per page	12 ▲ ▼
Customize Results List	<div> <div> <div>Boosted Records</div> <div> <input type="radio"/> Specific records <input checked="" type="radio"/> By Query </div> <div> <input type="text" value=": cameras"/> <div>Edit Query</div> </div> </div> <div> <div>Buried Records</div> <div> <input type="radio"/> Specific records <input checked="" type="radio"/> By Query </div> <div> <input type="text" value="(no query terms selected)"/> <div>Edit Query</div> </div> </div> </div>
Search Result Settings (apply when user provides search terms)	
Relevance ranking	Margin Bias ▼
Navigation Result Settings (apply when user does not provide search terms)	
Default Sort	Most Sales ▼

The **Section Settings** controls affect general settings for the cartridge. The following are configurable:

- **Records per page** — Set the number of records displayed per page.
The Application Developer configures the default value, increment, minimum value, and maximum value in the cartridge template.
- **Customize Results List** — You can use the Edit buttons to configure the **Boosted Records** or **Buried Records** by specifying selected records or a search state in the record selector. These options override the default position of the selected records in the sorting order. For more details, see "Configuring record boost and bury in the Results List cartridge."

The **Search Results Settings** controls include one configurable option:

- **Relevance ranking** — Select the relevance ranking on search results.

The template included with Discover Electronics features the following Relevance Ranking options:

- Margin Bias
- Inventory Bias
- First
- By Price (Static)
- Frequency

Additional drop-down options can be specified by your Application Developer in the cartridge template.

The **Navigation Result Settings** controls include one configurable option:

- **Default Sort** — This drop-down allows you to select how navigation results are sorted. By default, it is set to **Default**, the configuration defined in Endeca Developer Studio.

The template included with Discover Electronics features the following Sort options:

- Most Sales
- Best Conversion Rate
- Price (Ascending or Descending)

Additional drop-down options can be specified by your Application Developer in the cartridge template.

Related Links

[Configuring record boost and bury in the Results List cartridge](#) on page 107

You can configure the Results List cartridge to boost or bury selected records or dynamic search states. This overrides their default position in the sorting order.

[About the Select Records dialog](#) on page 86

The **Select Records** dialog provides traditional search and Guided Navigation within Experience Manager. Several cartridges, such as the Results List and Record Spotlight cartridges, use it as a means of selecting featured or dynamic records.

About ordering search and navigation results

The order in which results are displayed to the end user is determined by the presence of boosted or buried results and the sorting and relevance ranking options within cartridges.

Keyword search and Guided Navigation results display according to the following rules:

- If an end user triggers results from a text search, the result set is ordered by relevance ranking. If the end user reaches a results set using Guided Navigation and has not entered any search terms, the set is ordered according to the sort settings. In addition to sorting or relevance ranking, any boosted or buried results are moved to the top or bottom of the results.
- The end user can then manually select a sorting option, which overrides all of the boost, bury, sort, and relevance ranking configuration in the cartridge. The sort options that are available to the end user are specified by your application developer.

When configuring the sort and relevance ranking options on a content item, keep in mind that if it triggers only on a keyword search query, it will always use the selected relevance ranking instead of the sort order.

Configuring record boost and bury in the Results List cartridge

You can configure the Results List cartridge to boost or bury selected records or dynamic search states. This overrides their default position in the sorting order.

To boost or bury record results in the Results List cartridge in Experience Manager:

1. In the Experience Manager **Collection View**, select the group that contains your Results List pages. In the Discover Electronics reference application, this is the **Shared > Results List** collection.
2. In the **Content Item List View**, select the content item you wish to edit.
3. In the Content Tree, select the section where you wish to add or edit a Results List cartridge.
4. In the Content Details Panel, **Add** a Results List cartridge or select the Results List cartridge you wish to edit.
5. Configure boosted and buried refinements:

- a) Select the **Specific records** radio button to specify individual records, or the **By Query** radio button to select a dynamic search state.
- b) Click the **Edit List** or **Edit Query** button to edit your selection.
- c) Use the **Select Records** dialog to select featured records or a search state.
- d) Click the **Save Selection** button to save your selection.
- e) (Optional) Repeat Steps 5a-5c for both boosted and buried records.

You can boost specific records and bury a dynamic search state, or vice-versa, as shown below:


The screenshot shows the 'Customize Results List' interface. It has two main sections: 'Boosted Records' and 'Buried Records'. Each section has two radio buttons: 'Specific records' and 'By Query'. In the 'Boosted Records' section, 'Specific records' is selected, and a list box contains the IDs 1000751, 1000760, and 1000761. Below this list is an 'Edit List' button. In the 'Buried Records' section, 'By Query' is selected, and a text box contains the query 'Color: Silver'. Below this text box is an 'Edit Query' button.

6. Click **Save Changes** to save your changes and return to the **Content Item List View**.

Verify that your change took effect by navigating to the reference application at <http://localhost:8006/discover-authoring>. Following the example configuration shown in Step 5e, several QuickCam records have been boosted:

Showing 1 - 12 of 5616 items 1 2 3 4 5 >

Display: 12 per page Sort By: Relevance



Logitech

QuickCam® Chat For Skype

QuickCam® Chat for Skype


☆☆☆☆☆

Reviews(0)

\$1,029.00

Add to Cart

+ Add to wishlist



Logitech

QuickCam Communicate Deluxe

QuickCam Communicate Deluxe


☆☆☆☆☆

Reviews(0)

\$1,113.00

Add to Cart

+ Add to wishlist



Logitech

QuickCam® Communicate STX™

QuickCam® Communicate STX™


☆☆☆☆☆

Reviews(0)

\$914.00

Add to Cart

+ Add to wishlist



Kodak

Zx1

Zx1 3MP, 1/4.5" CMOS, 5.08 cm (2.0") LCD, 128MB, 90g

☆☆☆☆☆

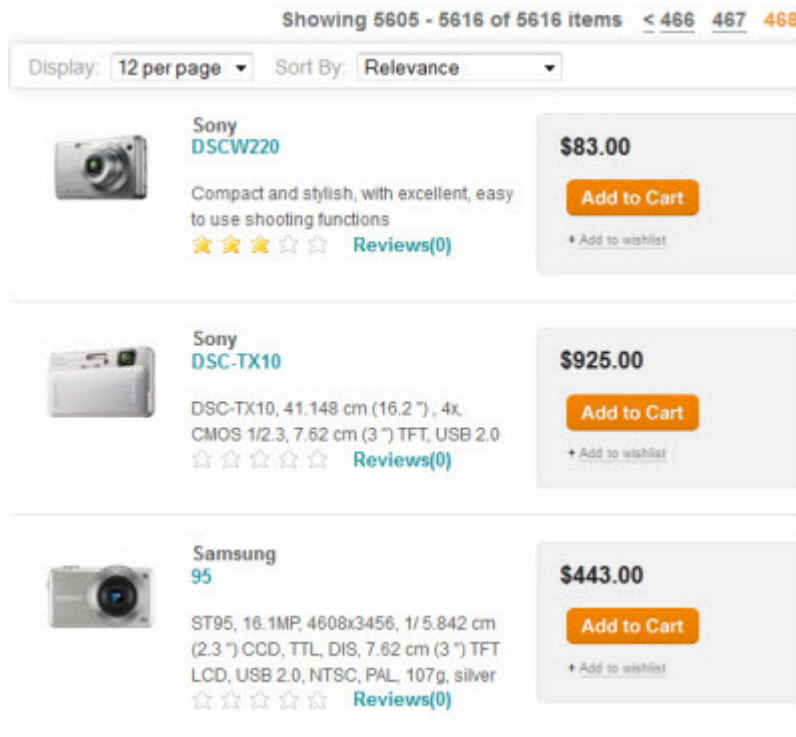
Reviews(0)

\$1,238.00

Add to Cart

+ Add to wishlist

Silver cameras have been buried:



Related Links

[The Results List cartridge](#) on page 105

The Results List cartridge displays search and navigation results to site users. You can configure it to boost or bury selected records.

Record details cartridges

Record details cartridges provide a container for configuring individual record information pages in your application. These cartridges provide an interface for configuring how record content displays.

The triggering conditions on a Record details cartridge can include navigation state triggers, so that different page styles display for different result categories or for individual results.

The Record Details Page cartridge

The Record Details cartridge is configured within a container Record Details page.

The exact layout and presentation of the resulting page depends on how the cartridge is rendered in your application. An example Record Details page with an included Record Details cartridge is shown below in the Discover Electronics reference application:



More images:



View larger

Digital IXUS 200 IS

- Video Capture Resolution: 1280 x 720 pixels
- Sensor Type: CCD
- Lens Focal Range: 4.3 - 21.5 mm
- Interface: USB 2.0, HDMI
- Processor Model: DIGIC 4 (iSAPS)

★★★★☆ Reviews(21) Write a review

Shipping Details

- ✓ Next day delivery order before 2pm
- ✓ Free delivery 5 - 8 days
- ✓ Standard delivery 1 - 5 days

Special Offers

- ✓ Free Giftwrap

\$466.00

Add to Cart

+ Add to Wishlist

Buy now and pick up
in your local store.

In-store pickup

Overview

Specifications

Accessories

Warranty Info

Ultra wide-angle IXUS. Style you can touch

Smart metal body in 4 colours

IXUS 200 IS's stylish two-tone solid sculpted feel + a pleasure to use

720p HD movies
during shooting, playback and in menus.

Powered by Endeca

Product Data © 2002-2010 ICECAT BIZ Disclaimer

Configuring the Record Details cartridge

Except for naming the cartridge in Experience Manager, the presentation of the Record Details cartridge is configured by your application developer. This includes selecting which record information is displayed on the page and how it is presented.

Content and spotlighting cartridges

Content and spotlight cartridges enable you to highlight and display static or dynamic content to the user in order to provide greater exposure to certain products or information.

The Media Banner cartridge

The Media Banner cartridge displays video or images to the site user and can be configured to link to a static page or specified navigation state within your application.

The cartridge is highlighted below in the Discover Electronics reference application:



Configuring the Media Banner cartridge

You can display media assets that your application developer has uploaded to the Endeca Configuration Repository. Additionally, you can select a static URL, a set of specified records, or a dynamic navigation state as a destination link for the media banner.

The cartridge configuration interface is shown below in the Content Details Panel in Experience Manager:

The **Media** controls allow you to launch the media selector by clicking the **Select** button.

The **General Settings** controls include an **Image Alt Text** field that allows you to specify mouseover text for the media banner.

The **Link Settings** controls change based on whether you are specifying a link to a page or navigation state within your application, or a destination URL:

For links to a location within the application, use the **Page** dropdown to select the appropriate servlet, and the **Select** button to launch the link selector:

Link Settings

Link Destination ☒ Select page ☐ Enter URL

Page

Record/Navigation State

For external links, use the **Path** field to enter the link location:

Link Settings

Link Destination ☐ Select page ☒ Enter URL

Path

Enter URL/URI (example: http://www.oracle.com, /path/to/other/page.html)

Related Links

About the link selector The link selector enables you to select an individual record or a dynamic search state using search and Guided Navigation within Experience Manager. Several cartridges, such as the Media Banner cartridge, use it as a means of specifying a link to a navigation state.

About the Select an Image dialog on page 89

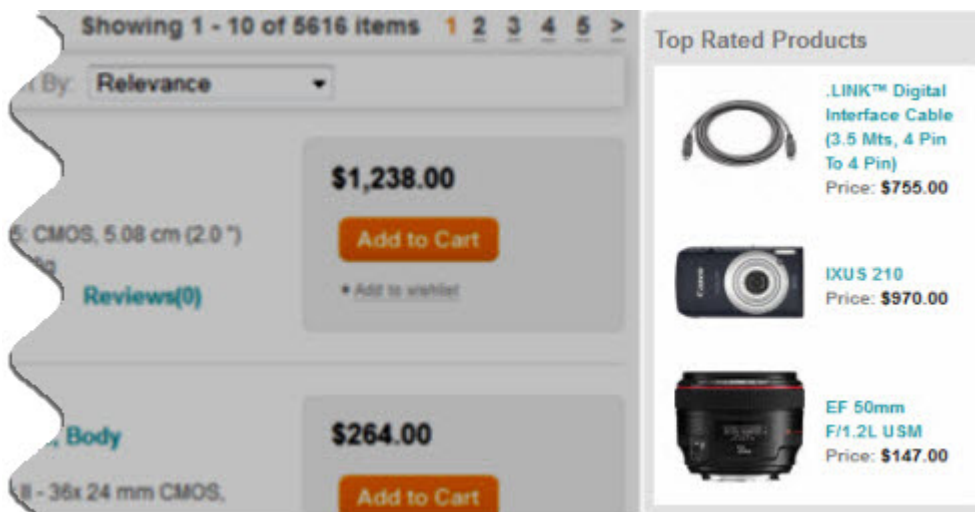
The **Select an Image** dialog allows you to link media resources into your cartridges.

The Record Spotlight cartridges

The Record Spotlight and Horizontal Record Spotlight cartridges highlight featured or dynamic records to the site user. The Record Spotlight cartridge displays results in a vertical layout suitable for placement in a sidebar, while the Horizontal Record Spotlight cartridge displays them in a banner.

The Record Spotlight cartridge

The Record Spotlight cartridge is highlighted below in the Discover Electronics reference application:

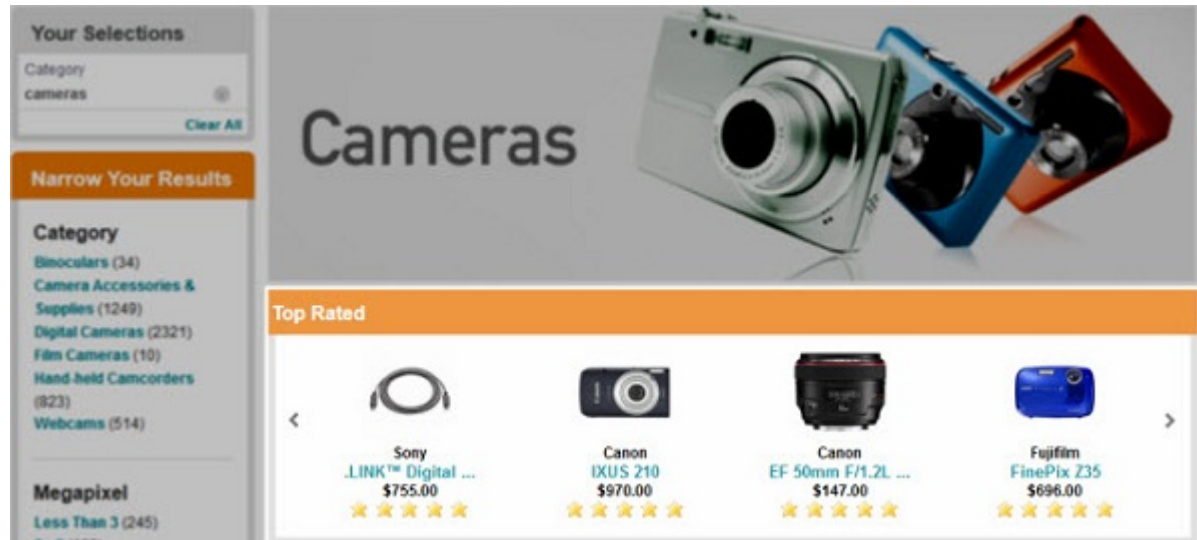


The Record Spotlight cartridge can be placed in the sidebar to show special deals, highly-rated products, or any other category of featured record results. It can be configured to display the same items across

the entire site by including it in a dynamic slot cartridge, or set to restrict results to the current navigation state by tailoring the list of featured records based on the landing page that the cartridge appears on.

The Horizontal Record Spotlight cartridge

The cartridge is highlighted below in the Discover Electronics reference application:



Similar to the Record Spotlight cartridge, the Horizontal Record Spotlight is a content item that can display dynamic or static featured records. You can configure the cartridge to display results based on the end user's navigation state, or to display a set of records independently of it.

Configuring the Record Spotlight cartridges

Both spotlighting cartridges use the **Select Records** dialog as an interface for specifying featured or dynamic records. The cartridge configuration interface is shown below:

Section Settings

Section Type

SecondaryContent

SecondaryContent

RecordSpotlight - Top Rated Products x Change

Name

Top Rated Products

Define Spotlight

Spotlight Title

Top Rated Products

Spotlight Records

☐ Specific records
 ☒ Records selected by query

product.review.avg_rating_range: 5

Record limit: 3

Clear

Edit Query

☒ Restrict to active refinements

Number of Records:

☐ Max (10)
 ☒ 3

Show 'See All' Link

☐

'See All' Link Text

The **Define Spotlight** controls contain all of the configurable options:

- **Spotlight Title** — Enter the title to display in the application.
- **Spotlight Records** — Specify selected records or a dynamic search state using the **Select Records** dialog.

When spotlighting records based on a query, the following additional options are available:

- **Restrict to active refinements** — Restrict the result set to a combination of the end user's current navigation state and the specified query.
- **Number of Records** — Specify the number of records to display. This is limited to the maximum value that the application developer specifies in the cartridge template based on the capabilities of the application.
- **Show 'See All' Link** — Enable the display of a "See All" link. The end user can click this to display all results, instead of limiting the displayed results to the number specified under **Number of Records**.
- **'See All' Link Text** — Enter text for the a "See All" link.

Related Links

[About the Select Records dialog](#) on page 86

The **Select Records** dialog provides traditional search and Guided Navigation within Experience Manager. Several cartridges, such as the Results List and Record Spotlight cartridges, use it as a means of selecting featured or dynamic records.

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