

Oracle® Content Manager

Implementation and Administration Guide

Release 12.2

Part No. E48921-01

September 2013

Oracle and Java are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Xeon are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Opteron, the AMD logo, and the AMD Opteron logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this is software or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, the following notice is applicable:

U.S. GOVERNMENT END USERS: Oracle programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, delivered to U.S. Government end users are "commercial computer software" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, use, duplication, disclosure, modification, and adaptation of the programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, shall be subject to license terms and license restrictions applicable to the programs. No other rights are granted to the U.S. Government.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

This software or hardware and documentation may provide access to or information on content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services.

Contents

Send Us Your Comments

Preface

1 Introduction to Oracle Content Manager

Overview of Oracle Content Manager.....	1-1
Key Features of Oracle Content Manager.....	1-1

2 Dependencies and Integration Points

Verifying CRM Applications.....	2-1
Create an FND User.....	2-2
Assigning AOL Responsibilities to the User.....	2-2
Setting Profile Options at User, Application, Responsibility, and Site Levels.....	2-2
Creating a Workflow With Notifications.....	2-3

3 Implementation Tasks for Oracle Content Manager

Implementation Tasks.....	3-1
Setting Profile Options	3-2
Setting Up Users.....	3-2
Launching the OCM Administrator User Interface.....	3-3
Setting Environments for Translations.....	3-3
Assigning Folder Permissions.....	3-3
Setting Session Timeouts	3-4
Setting Up Intermedia Index Searches.....	3-4
Verifying Implementation.....	3-4
Diagnosing the Errors Using PL/SQL Logging.....	3-6

Setting Up PL/SQL Level Logging.....	3-6
--------------------------------------	-----

4 Administering Oracle Content Manager

Understanding Content Types.....	4-1
Creating and Managing Content Types.....	4-2
Setting Up Custom Attribute LOVs.....	4-5
Mapping Stylesheets to a Content Type.....	4-5
Creating and Managing Content Type Groups.....	4-6
Mapping File Extensions to Content Types.....	4-6
Data Security Overview.....	4-7
Access Control.....	4-7
Inheriting or Overriding Parent Access Control.....	4-8
Guidelines for Assigning Permissions to Users.....	4-9
Setting Permissions and Exclusions for a Folder.....	4-9
Understanding Access Control with a Scenario.....	4-9
Understanding Categories.....	4-12
Category Access Control.....	4-13
Creating a Category and Setting Access Control.....	4-13

A Oracle Content Manager Profile Options and Lookups

Finding Responsibility ID Values.....	A-1
Oracle CRM Technology Foundation (JTT) Profile Options.....	A-1
Oracle Content Manager Profile Options.....	A-2
Oracle Content Manager Lookups.....	A-5

B Seeded Information

Seeded Content Types.....	B-1
IBC_IMAGE.....	B-1
IBC_STYLESHEET.....	B-2
IBC_BASIC_CL.....	B-3
IBC_CONTENT_BLOCK.....	B-3
IBC_COVER_LETTER.....	B-4
IBC_FILE.....	B-5
IBC_IMAGE.....	B-5
IBC_QUERY.....	B-6
Oracle Content Manager Customer UI Responsibilities.....	B-6
Seeded Responsibilities.....	B-7
List of Concurrent Programs.....	B-7
Online Help Targets.....	B-8
Generic Online Help Page.....	B-13

C Content Item XML Formats

XML Format Overview..... C-1

Regular Expressions..... C-1

An XML Example for Content Item..... C-3

Glossary

Index

Send Us Your Comments

Oracle Content Manager Implementation and Administration Guide, Release 12.2

Part No. E48921-01

Oracle welcomes customers' comments and suggestions on the quality and usefulness of this document. Your feedback is important, and helps us to best meet your needs as a user of our products. For example:

- Are the implementation steps correct and complete?
- Did you understand the context of the procedures?
- Did you find any errors in the information?
- Does the structure of the information help you with your tasks?
- Do you need different information or graphics? If so, where, and in what format?
- Are the examples correct? Do you need more examples?

If you find any errors or have any other suggestions for improvement, then please tell us your name, the name of the company who has licensed our products, the title and part number of the documentation and the chapter, section, and page number (if available).

Note: Before sending us your comments, you might like to check that you have the latest version of the document and if any concerns are already addressed. To do this, access the new Oracle E-Business Suite Release Online Documentation CD available on My Oracle Support and www.oracle.com. It contains the most current Documentation Library plus all documents revised or released recently.

Send your comments to us using the electronic mail address: appsdoc_us@oracle.com

Please give your name, address, electronic mail address, and telephone number (optional).

If you need assistance with Oracle software, then please contact your support representative or Oracle Support Services.

If you require training or instruction in using Oracle software, then please contact your Oracle local office and inquire about our Oracle University offerings. A list of Oracle offices is available on our Web site at www.oracle.com.

Preface

Intended Audience

Welcome to Release 12.2 of the *Oracle Content Manager Implementation and Administration Guide*.

This guide is intended for persons who are responsible for implementing and administering the Oracle Content Manager application.

This guide assumes you have a working knowledge of the principles and customary practices of your business area.

See Related Information Sources on page x for more Oracle E-Business Suite product information.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at
<http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

Access to Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For information, visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info> or visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs> if you are hearing impaired.

Structure

- 1 Introduction to Oracle Content Manager**
- 2 Dependencies and Integration Points**
- 3 Implementation Tasks for Oracle Content Manager**
- 4 Administering Oracle Content Manager**
- A Oracle Content Manager Profile Options and Lookups**

Related Information Sources

Integration Repository

The Oracle Integration Repository is a compilation of information about the service endpoints exposed by the Oracle E-Business Suite of applications. It provides a complete catalog of Oracle E-Business Suite's business service interfaces. The tool lets users easily discover and deploy the appropriate business service interface for integration with any system, application, or business partner.

The Oracle Integration Repository is shipped as part of the E-Business Suite. As your instance is patched, the repository is automatically updated with content appropriate for the precise revisions of interfaces in your environment.

You can navigate to the Oracle Integration Repository through Oracle E-Business Suite Integrated SOA Gateway.

Online Documentation

All Oracle E-Business Suite documentation is available online (HTML or PDF).

- **PDF** - See the Oracle E-Business Suite Documentation Library for current PDF documentation for your product with each release. The Oracle E-Business Suite Documentation Library is also available on My Oracle Support and is updated frequently.
- **Online Help** - Online help patches (HTML) are available on My Oracle Support.
- **Release Notes** - For information about changes in this release, including new features, known issues, and other details, see the release notes for the relevant product, available on My Oracle Support.
- **Oracle Electronic Technical Reference Manual** - The Oracle Electronic Technical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for each Oracle E-Business Suite product. This information helps you convert data from your existing applications and integrate Oracle E-Business Suite data with non-Oracle applications, and write custom reports for Oracle E-Business Suite products. The Oracle eTRM is available on My Oracle Support.

Guides Related to All Products

Oracle E-Business Suite User's Guide

This guide explains how to navigate, enter data, query, and run reports using the user interface (UI) of Oracle E-Business Suite. This guide also includes information on setting user profiles, as well as running and reviewing concurrent programs.

You can access this guide online by choosing "Getting Started with Oracle Applications" from any Oracle E-Business Suite product help file.

Guides Related to this Product

Oracle Application Framework Personalization Guide

This guide describes how to personalize Oracle Application Framework-based Oracle E-Business Suite application pages as an end-user and as a personalization administrator using the Oracle Application Personalization Framework.

Oracle HRMS Documentation Set

This set of guides explains how to define your employees, so you can give them operating unit and job assignments. It also explains how to set up an organization (operating unit). Even if you do not install Oracle HRMS, you can set up employees and organizations using Oracle HRMS windows. Specifically, the following manuals will help you set up employees and operating units:

- **Oracle HRMS Enterprise and Workforce Management Guide**

This user guide explains how to set up and use enterprise modeling, organization management, and cost analysis.

- **Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide**

Use this guide to find out about setting up employees and managing your people resources.

Oracle One-to-One Fulfillment Implementation Guide

Oracle One-to-One Fulfillment provides Oracle E-Business Suite applications with a centralized mechanism for compiling and distributing information to customers. E-Business Suite applications use the Oracle One-to-One Fulfillment API to compile the personalized content for the fulfillment request and determine the recipients of this content. The content can be cover letters, collateral, or templates with associated queries.

Oracle Partner Management Implementation and Administration Guide

Oracle Partner Management enables vendors to recruit and motivate partners to sell products. You can implement partner dashboards for partners to manage their activities and channel manager dashboards for vendors to manage and monitor partner activities and performance. You can also create partner profiles, set up partner activities, and create partner programs to help train partners and provide incentives and benefits.

Oracle Marketing Implementation Guide

Oracle Marketing provides the tools necessary to automate the planning, budgeting, execution, and tracking of your marketing initiatives. It provides a single repository of customer information that enables you to analyze, personalize, refine, and target your campaigns to better align with sales. You can set up fatigue rules to define contact limits by time period and by channel.

Oracle Proposals Implementation Guide

Oracle Proposals enables sales representatives to generate proposals in the field from templates created and published by sales administrators. This guide describes how to set up different proposal users, and install and integrate with the applications that you need to create and maintain proposals such as Oracle Sales, Oracle Telesales, Oracle Quoting, Oracle Marketing, Oracle Content Manager, and Oracle Trading Community Architecture.

Installation and System Administration

Oracle Alert User's Guide

This guide explains how to define periodic and event alerts to monitor the status of your Oracle E-Business Suite data.

Oracle E-Business Suite Concepts

This book is intended for all those planning to deploy Oracle E-Business Suite Release 12.2, or contemplating significant changes to a configuration. After describing the Oracle E-Business Suite architecture and technology stack, it focuses on strategic topics, giving a broad outline of the actions needed to achieve a particular goal, plus the installation and configuration choices that may be available.

Oracle E-Business Suite CRM System Administrator's Guide

This manual describes how to implement the CRM Technology Foundation (JTT) and use its System Administrator Console.

Oracle E-Business Suite Developer's Guide

This guide contains the coding standards followed by the Oracle E-Business Suite development staff. It describes the Oracle Application Object Library components needed to implement the Oracle E-Business Suite user interface described in the *Oracle E-Business Suite User Interface Standards for Forms-Based Products*. It also provides information to help you build your custom Oracle Forms Developer forms so that they integrate with Oracle E-Business Suite. In addition, this guide has information for customizations in features such as concurrent programs, flexfields, messages, and logging.

Oracle E-Business Suite Installation Guide: Using Rapid Install

This book is intended for use by anyone who is responsible for installing or upgrading Oracle E-Business Suite. It provides instructions for running Rapid Install either to carry out a fresh installation of Oracle E-Business Suite Release 12.2, or as part of an upgrade to Release 12.2.

Oracle E-Business Suite Maintenance Guide

This guide contains information about the strategies, tasks, and troubleshooting activities that can be used to help ensure an Oracle E-Business Suite system keeps running smoothly, together with a comprehensive description of the relevant tools and utilities. It also describes how to patch a system, with recommendations for optimizing typical patching operations and reducing downtime.

Oracle E-Business Suite Security Guide

This guide contains information on a comprehensive range of security-related topics, including access control, user management, function security, data security, and auditing. It also describes how Oracle E-Business Suite can be integrated into a single sign-on environment.

Oracle E-Business Suite Setup Guide

This guide contains information on system configuration tasks that are carried out either after installation or whenever there is a significant change to the system. The activities described include defining concurrent programs and managers, enabling Oracle Applications Manager features, and setting up printers and online help.

Oracle E-Business Suite User Interface Standards for Forms-Based Products

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

Other Implementation Documentation

Oracle Approvals Management Implementation Guide

This guide describes transaction attributes, conditions, actions, and approver groups that you can use to define approval rules for your business. These rules govern the process for approving transactions in an integrated Oracle application. You can define approvals by job, supervisor hierarchy, positions, or by lists of individuals created either at the time you set up the approval rule or generated dynamically when the rule is invoked. You can learn how to link different approval methods together and how to run approval processes in parallel to shorten transaction approval process time.

Oracle Diagnostics Framework User's Guide

This guide contains information on implementing, administering, and developing diagnostics tests for Oracle E-Business Suite using the Oracle Diagnostics Framework.

Oracle E-Business Suite Flexfields Guide

This guide provides flexfields planning, setup and reference information for the Oracle E-Business Suite implementation team, as well as for users responsible for the ongoing maintenance of Oracle E-Business Suite product data. This guide also provides information on creating custom reports on flexfields data.

Oracle E-Business Suite Integrated SOA Gateway Implementation Guide

This guide explains the details of how integration repository administrators can manage and administer the entire service enablement process based on the service-oriented architecture (SOA) for both native packaged public integration interfaces and composite services - BPEL type. It also describes how to invoke Web services from Oracle E-Business Suite by working with Oracle Workflow Business Event System, manage Web service security, and monitor SOAP messages.

Oracle E-Business Suite Integrated SOA Gateway User's Guide

This guide describes how users can browse and view the integration interface definitions and services that reside in Oracle Integration Repository.

Oracle E-Business Suite Multiple Organizations Implementation Guide

This guide describes how to set up multiple organizations and the relationships among them in a single installation of an Oracle E-Business Suite product such that transactions flow smoothly through and among organizations that can be ledgers, business groups, legal entities, operating units, or inventory organizations. You can use this guide to assign operating units to a security profile and assign this profile to responsibilities such that a user can access data for multiple operating units from a single responsibility. In addition, this guide describes how to set up reporting to generate reports at different

levels and for different contexts. Reporting levels can be ledger or operating unit while reporting context is a named entity in the selected reporting level.

Oracle e-Commerce Gateway Implementation Guide

This guide describes implementation details, highlighting additional setup steps needed for trading partners, code conversion, and Oracle E-Business Suite. It also provides architecture guidelines for transaction interface files, troubleshooting information, and a description of how to customize EDI transactions.

Oracle e-Commerce Gateway User's Guide

This guide describes the functionality of Oracle e-Commerce Gateway and the necessary setup steps in order for Oracle E-Business Suite to conduct business with trading partners through Electronic Data Interchange (EDI). It also describes how to run extract programs for outbound transactions, import programs for inbound transactions, and the relevant reports.

Oracle iSetup User's Guide

This guide describes how to use Oracle iSetup to migrate data between different instances of the Oracle E-Business Suite and generate reports. It also includes configuration information, instance mapping, and seeded templates used for data migration.

Oracle Product Hub Implementation Guide

This guide explains how to set up hierarchies of items using catalogs and catalog categories and then to create user-defined attributes to capture all of the detailed information (such as cost information) about an object (such as an item or change order). It also explains how to set up optional features used in specific business cases; choose which features meet your business' needs. Finally, the guide explains the set up steps required to link to third party and legacy applications, then synchronize and enrich the data in a master product information repository.

Oracle Product Hub User's Guide

This guide explains how to centrally manage item information across an enterprise, focusing on product data consolidation and quality. The item information managed includes item attributes, categorization, organizations, suppliers, multilevel structures/bills of material, packaging, changes, attachments, and reporting.

Oracle Web Applications Desktop Integrator Implementation and Administration Guide

Oracle Web Applications Desktop Integrator brings Oracle E-Business Suite functionality to a spreadsheet, where familiar data entry and modeling techniques can be used to complete Oracle E-Business Suite tasks. You can create formatted spreadsheets on your desktop that allow you to download, view, edit, and create Oracle

E-Business Suite data, which you can then upload. This guide describes how to implement Oracle Web Applications Desktop Integrator and how to define mappings, layouts, style sheets, and other setup options.

Oracle Workflow Administrator's Guide

This guide explains how to complete the setup steps necessary for any Oracle E-Business Suite product that includes workflow-enabled processes. It also describes how to manage workflow processes and business events using Oracle Applications Manager, how to monitor the progress of runtime workflow processes, and how to administer notifications sent to workflow users.

Oracle Workflow Developer's Guide

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

Oracle Workflow User's Guide

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

Oracle XML Gateway User's Guide

This guide describes Oracle XML Gateway functionality and each component of the Oracle XML Gateway architecture, including Message Designer, Oracle XML Gateway Setup, Execution Engine, Message Queues, and Oracle Transport Agent. It also explains how to use Collaboration History that records all business transactions and messages exchanged with trading partners.

The integrations with Oracle Workflow Business Event System, and the Business-to-Business transactions are also addressed in this guide.

Oracle XML Publisher Administration and Developer's Guide

Oracle XML Publisher is a template-based reporting solution that merges XML data with templates in RTF or PDF format to produce outputs to meet a variety of business needs. Outputs include: PDF, HTML, Excel, RTF, and eText (for EDI and EFT transactions). Oracle XML Publisher can be used to generate reports based on existing Oracle E-Business Suite report data, or you can use Oracle XML Publisher's data extraction engine to build your own queries. Oracle XML Publisher also provides a robust set of APIs to manage delivery of your reports via e-mail, fax, secure FTP, printer, WebDav, and more. This guide describes how to set up and administer Oracle XML Publisher as well as how to use the Application Programming Interface to build custom solutions. This guide is available through the Oracle E-Business Suite online help.

Oracle XML Publisher Report Designer's Guide

Oracle XML Publisher is a template-based reporting solution that merges XML data with templates in RTF or PDF format to produce a variety of outputs to meet a variety of business needs. Using Microsoft Word or Adobe Acrobat as the design tool, you can create pixel-perfect reports from the Oracle E-Business Suite. Use this guide to design your report layouts. This guide is available through the Oracle E-Business Suite online help.

Training and Support

Training

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

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

Support

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

Do Not Use Database Tools to Modify Oracle E-Business Suite Data

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

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

Because Oracle E-Business Suite tables are interrelated, any change you make using an Oracle E-Business Suite form can update many tables at once. But when you modify Oracle E-Business Suite data using anything other than Oracle E-Business Suite, you

may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle E-Business Suite.

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

Introduction to Oracle Content Manager

This chapter covers the following topics:

- Overview of Oracle Content Manager
- Key Features of Oracle Content Manager

Overview of Oracle Content Manager

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

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

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

Key Features of Oracle Content Manager

The key features of OCM include:

- Store data in the central repository
- Create content based on templates
- Control multiple versions of the same content

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

Dependencies and Integration Points

This chapter covers the following topics:

- Verifying CRM Applications
- Create an FND User
- Assigning AOL Responsibilities to the User
- Setting Profile Options at User, Application, Responsibility, and Site Levels
- Creating a Workflow With Notifications

Verifying CRM Applications

Oracle Content Manager (OCM) is dependent on the Oracle Applications that provide the underlying technology stack, schema, and structure.

OCM depends on the following modules:

- Oracle CRM Technology Foundation
- Oracle Application (OA) Framework

You must complete the following tasks successfully to verify that the CRM applications are working properly:

1. Create an FND User, page 2-2
2. Assign AOL Responsibilities to the User, page 2-2
3. Set Profile Options at User, Application, Responsibility, and Site Levels, page 2-2
4. Creating a Workflow With Notifications, page 2-3

Create an FND User

Create an FND user in the Application Object Library to verify that the CRM applications are working properly. To create an FND user, log into Oracle E-Business Suite with the System Administrator responsibility.

For more details on creating users, see *Oracle E-Business Suite Setup Guide*.

For the user to access the HTML application, you must set additional profile options as detailed in the *Oracle E-Business Suite CRM System Administrator's Guide*.

Navigation: Security > User > Define.

Notes:

- After selecting a name from the Person LOV, in the Responsibilities subtab, select the CRM HTML Administration responsibility from the drop-down list and save the user.
- To verify that the user is created successfully, log in to the Personal Home page as the newly created user and enter the password when prompted. You should now be able to access the Personal Home Page for this user.

Assigning AOL Responsibilities to the User

A responsibility defines an application user's current privileges while working with Oracle Applications. When an application user logs in, the user must select a responsibility that grants certain privileges to access functions, run concurrent programs, check reports, and so on.

You can deactivate a user's responsibility at any time by setting the End Date to the current date. To activate the responsibility for the user, change the End Date to a date after the current date, or clear the value in the End Date. For more information on employee management, see *Oracle HRMS Enterprise and Workforce Management Guide*.

To assign AOL responsibilities to the user, log into Oracle Applications with the System Administrator responsibility.

Prerequisites: An FND user must exist.

Navigation: Security > User > Define

Note: Note: Define the Effective Dates for the responsibility to be active.

Setting Profile Options at User, Application, Responsibility, and Site Levels

A user profile is a set of changeable options that affect the way the application looks

and behaves. As a System Administrator, you can control how Oracle Applications operate by setting user profile options to the required values. You can set user profile options at four different levels: site, application, responsibility, and user.

To set up profile options, log into Oracle Applications with the System Administrator responsibility.

Note: You can set default values for profiles at Site level for the application. If you do not set a default value for a profile at any of the four levels, then you get errors when you use Oracle Applications, run reports, or run concurrent requests.

Prerequisites:

- An FND User must exist.
- Before changing any settings in Oracle Forms, ensure that all Oracle Applications server processes are up and running. In particular, if you have stopped the concurrent managers before applying Oracle Applications patchsets, then restart them now by changing the value to `$COMMON_TOP/admin/scripts`, and executing `adcmctl.sh <APPS username/APPS password> start`.

Navigation: Security > Profile > System

Notes:

- Site value: This field displays the current value for all users at the installation site.
- Application value: It displays the current value for all users working under responsibilities owned by the application identified in the Find Profile Values region.
- Responsibility value: It displays the current value for all users working under the responsibility identified in the Find Profile Values region.
- User value: It displays the current value, if set, for the application user identified in the Find Profile Values region.

Creating a Workflow With Notifications

To create and run workflow notifications, you must have the Oracle Workflow Administrator responsibility. You must also configure the login user as a Workflow Administrator under Workflow Administrator Web Applications, Administrator Workflow, then click the Administration link and click the Workflow Configuration sub tab. For more information on workflows, see *Oracle Workflow User's Guide*.

Navigation: Go to Workflow Administrator Web Applications, then select Administrator Workflow, then click the Developer Studio link.

Notes:

- Enter the following Workflow Identifier values:
 - Item Key: Enter your name plus a sequence number (for example, jdoe1001).
 - User Key: You can copy the value from the Item Key field.
 - Process: Enter Document Review.

Enter the Workflow Attributes, which may vary according to the workflow selected. For example, the Document Review process may have the following attributes.

- Process Owner: Your logged in user name populates automatically
 - Send Document: Leave blank.
 - Document Owner: Select a valid resource name.
 - Document Reviewer: Select a value from the list of values.
 - Comments: Enter Workflow Verification.
 - Response Document: Leave blank.
-
- To see an explanation of the error, click the **Error** link in the Status Monitor.
 - To see a graphical representation of the workflow process, click **View Diagram**.

Implementation Tasks for Oracle Content Manager

This chapter covers the following topics:

- Implementation Tasks
- Verifying Implementation
- Diagnosing the Errors Using PL/SQL Logging

Implementation Tasks

To implement Oracle Content Manager (OCM) successfully, Oracle strongly recommends that you execute the following tasks in the same order as listed below:

1. Setting Profile Options, page 3-2
2. Setting Up Users, page 3-2
3. Launching OCM Administrator User Interface, page 3-3
4. Setting Environments for Translations, page 3-3
5. Assigning Folder Permissions, page 3-3
6. Setting Session Timeouts, page 3-4
7. Setting Up Intermedia Index Searches, page 3-4

Note: Before implementing Oracle Content Manager (OCM), the functional implementation team in your organization must analyze your business requirements and setup the implementation steps accordingly.

Setting Profile Options

Profiles control the behavior of all the Oracle applications. All Oracle application profile options begin with a two or three letter code. The OCM profiles begin with the prefix IBC. To set OCM profile options, select a level to set the profile option. You can select either Site, Application, Responsibility, or User.

For more information on setting Oracle application profile options, see *Oracle E-Business Suite Setup Guide*.

For more information on JTT profile options, see *Oracle CRM Technology*, page A-1 Foundation (JTT) Profile Options.

Setting Up Users

You can categorize users in your organization according to the functions they perform in OCM. The users can be administrators, content item creators, approvers, translators, and so on.

The users can access the application to create, edit, approve, translate, and delete content depending on their responsibilities. In OCM, the administrator is called the Content Super User.

Setting Up the Content Super User

You must create an administrator user or an Content Super User with all the privileges in the OCM application. The menu assigned to the IBC Super User responsibility is called Oracle Content Manager Root Menu, which is IBC_ROOT_MENU_LVL1.

Setting Up Multiple Users in OCM

Multiple users can access OCM having specific responsibilities, depending upon their roles in the organization. Depending on your business requirements, you can create users and assign responsibilities to the roles such as Content Creators and Content Users.

With multiple users having access only to their specific functions, management of users becomes more efficient and secure. You must create users and assign them the required responsibilities.

Apart from assigning appropriate responsibilities, as a Content Super User, you must grant folder permissions to these users. See *Assigning Folder Permissions*, page 3-3.

Note: You must explicitly grant folder permissions even for Content Super User responsibility. All permissions must be explicitly granted on the folders. No privilege is automatically entitled to the super user.

For information on creating responsibilities and mapping them to tabs, see the *Oracle Applications System Administrator's Guide*.

Launching the OCM Administrator User Interface

Typically, users access OCM UI to complete their assigned tasks. To access the UI, users must:

- Verify that the cookies are enabled for the browser.

For any information related to the browser, see your browser documentation.

- Log into the Applications login page using the user name and password that the system administrator has set for you. If you find any error, then try clearing the cookies or see your browser documentation for details.

Setting Environments for Translations

The users can use the Update Translations feature to view and update the content items that are marked for translation. To enable this feature in OCM, you must setup the environment for translations.

To be able to translate and view translations, it is recommended that you use the UTF8 character set on all three tiers: database server, middle tier application server, and browser client. Ensure that the character set encoding of the session language is a super set of the base language and the translated language. For instance, the Western European encoding may enable translations between any of the Western European languages such as English and French, but may not work while translating to other languages such as Japanese.

For more information on setting up your environment for translation, see the *Oracle E-Business Suite Setup Guide*.

Assigning Folder Permissions

In OCM, by default, the data security is enabled if the profile IBC: Use Access Control is set to Y. The Content Super User must create and assign the access control on the folders for users.

Note: Initially, only the Content Super User can access the Root folder. To assign permissions to other users, as an Content Super User you must add the required permissions to yourself and then grant access permissions to other users. If IBC: Use Control profile is set to N, then there is no access control set for OCM. All the users will have all the permissions and anyone can access any data.

To assign access control to the folders, log into Oracle Content Manager as Content Super User.

Navigation: Content > My Content

Notes:

- **Override radio button:** Use this button to override parent folder access control. Only when the Override radio button is enabled, the fields in the Permissions and Exclusions regions are enabled.
- **Inherit radio button:** Use this button to inherit parent folder access control.

Setting Session Timeouts

OCM is built on two frameworks - the OA framework and the JTT framework. The session timeout in the OA framework must always be *greater* than the session timeout in the JTT framework.

JTT Framework

The JTT session timeout is configured at the JTT Administrative Console. Log into Oracle Applications and navigate to Settings > System > Sessions. Enter a value in the Expires if idle for (mins) field. The default value is 30 minutes.

OA Framework

The OA session timeout is driven by the session.timeout directive in the zone.properties file of the Apache configuration. The default value is 60 minutes. Set this value to a number that is greater than the JTT Framework session timeout value.

Setting Up Intermedia Index Searches

To periodically rebuild intermedia index and optimize the intermedia index, log into Oracle Applications with Oracle Content Manager responsibility.

Prerequisites: Run the Concurrent Manager.

Navigation: Requests > Run.

Notes:

- After selecting a value from the LOV (for example, OCM InterMedia Index Optimizing operation for Attribute Bundle), click **Schedules** and select an appropriate frequency. For example, select one hour to run the concurrent program every hour.
- Repeat the same procedure for other values also.

Verifying Implementation

In this section, you can use the case study to verify if OCM is implemented successfully

Create the following users and assign them the responsibilities and permissions as listed in Table: User Name, Responsibility, and Permissions, page 3-5 for the */Root/Common* folder.

User Name, Responsibility, and Permissions

User Name	Responsibility	Permissions
Anna	Content Creator	Manage Folders
John	Content Creator	Manage Items
Joseph	Content Creator	Approve Item
Michael	Content Creator	Translate Item
Nicole	Content Creator	Approve Translation
Terry	Content Creator	Read Item

Table: Verifying Implementation Task Sequence, page 3-5 lists the tasks that you must perform to verify the implementation.

Verifying Implementation Task Sequence

No.	Task	Reference
1	Log in as a Content Super User and create users and assign responsibilities as specified in Table: User Name, Responsibility, and Permissions, page 3-5.	Setting Up Users, page 3-2
2	Select <i>/Root/Common</i> folder and set the appropriate permissions to the users as listed in Table: User Name, Responsibility, and Permissions, page 3-5.	Setting Permissions and Exclusions for a folder, page 4-9
3	Log in as John Create a content item, select the Translation Required check box, and submit it for approval.	

No.	Task	Reference
4	Joseph receives a notification and approves the content item. As the content item is to be translated, a notification is sent to Michael to translate the content item.	
5	Log in as Michael and approve the content item submitted by John.	
6	Nicole receives a notification. Log in as Nicole. Approve the translation.	
7	Log in as Terry. You must be able to browse the <i>/Root/Common</i> folder but must not be able to create content item. You must be able to only view the content item as you have the Read Item permission.	

Diagnosing the Errors Using PL/SQL Logging

OCM enables the users to log debug messages. This feature creates a separate log file for different users. User can use the log file to diagnose the problems in the application. For more information on diagnosing, see *Oracle Diagnostics Pack*.

Setting Up PL/SQL Level Logging

You must set PL/SQL profiles for the application to log the error messages for different users in different files. The log file is created in the directory as specified in the profile IBC: Debug Log Directory. The syntax of the file name is IBC_<Username>.log.

To set up PL/SQL level logging, log into Oracle Applications as the System Administrator.

Prerequisites: PL/SQL profile values must be set.

Navigation: Profile > System.

Notes:

- Select a user and set the profile option IBC: Enable Debug to Yes at the User level.
- Set IBC: Debug Log Directory profile at the Site level to a directory that is accessible by the database server. This is the `utl_file_dir` parameter. To determine this

```
value, SELECT * from v$parameter where name like 'utl_file_dir'
.
```

- Set the `init.ora` `UTL_FILE_DIR` parameter to point to the same directory and save the settings.

Administering Oracle Content Manager

This chapter covers the following topics:

- Understanding Content Types
- Creating and Managing Content Types
- Setting Up Custom Attribute LOVs
- Mapping Stylesheets to a Content Type
- Creating and Managing Content Type Groups
- Mapping File Extensions to Content Types
- Data Security Overview

Understanding Content Types

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

A content type can consists of simple attributes, subitems, and compound content types such as Product Name, Description, Feature Highlights, Overview, Product Information Guide (attachment), and Product Release Date.

Simple Attributes

Attributes can be of type Extended, Pull-down, and Attachment. For example, an Image Type can have attributes such as image attachment, image height, width, and alternate text.

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

- Date - appears as a date picker
- Number - accepts numbers
- HTML - is displayed as rich text html editor
- Text - accepts characters
- Attribute URL - accepts a URL
- The pull-down attributes appear as values in the drop-down list.
- The attachment attribute enables you to upload attachments for the content item.

Subitems

Subitems are individual content items based on their corresponding content types. For example, a Sales Kit can consist of White Paper and Datasheet, as subitems.

Compound Content Types

Apart from extended, pull-down list, and attachment attributes, compound content type is another attribute. A content type can have other content type as its component. Such a content type is called a compound content type. For example, a Product Brochure content type can have other content types such as product presentation, product white paper, and product demo as its components. This makes the Product Brochure a compound content type.

Creating and Managing Content Types

Only System Administrators and Content Super Users can create and manage content types. Figure: Creating a Content Type, page 4-3 depicts the process to create a content type.

Minimum and Maximum Instances

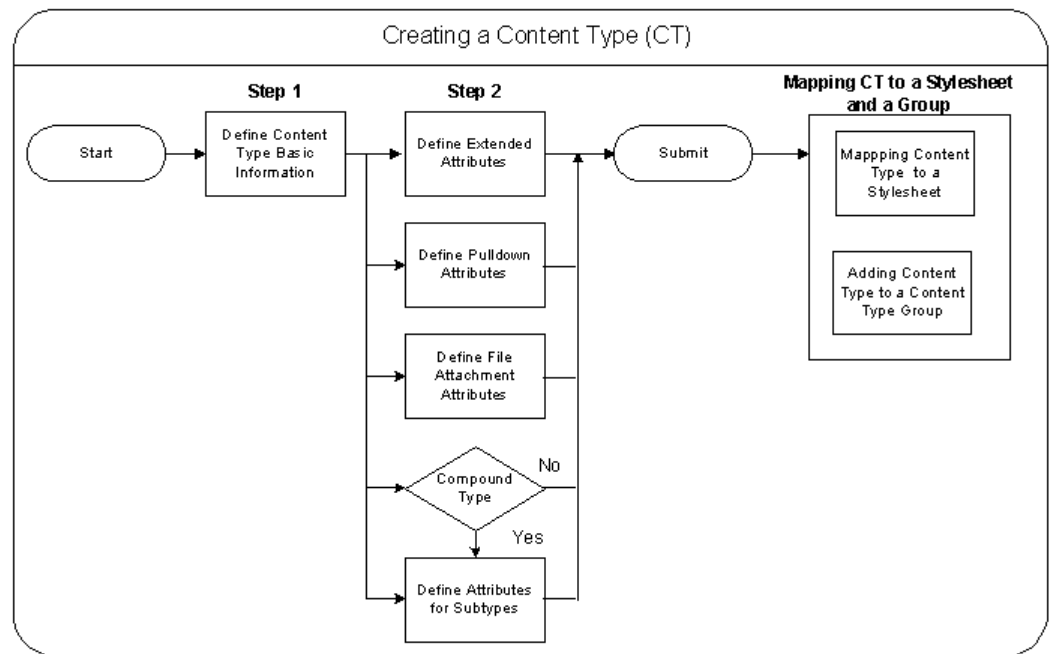
While creating a compound content type, you can specify the minimum and maximum number of content items that can be added to the compound content item.

If you specify the minimum value to be zero, then the subitem of this type is not mandatory. If you specify a number greater than zero, then while creating the compound content item, it is mandatory to add that many number of content items as subitems.

If you specify a number in the maximum field, then that many content items can be added for the compound content item. If you leave it blank, then while creating the compound content item, any number of content items can be added as subitems.

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

Creating a Content Type



Creating a content type is a two step process:

1. In the first step, provide the basic details of the content type such as the name, owner, and the default stylesheet.
2. In the second step, define its attributes.

After creating a content type, you can map it to a stylesheet and also add it to a content type group. For details, see sections Mapping Stylesheets to a Content Type, page 4-5 and Creating and Managing Content Type Groups, page 4-6.

Use the following procedure to create a content type.

Steps:

1. Log into Oracle Content Manager as the Content Super User and navigate to Content Types tab.
2. Click **Create Content Type**.

3. Enter the required details such as name, description, and owner fields.
4. Select active from the Status menu.

Only if the content type is active, it is available for creating content items.
5. Enter an XML tag for the content type in the Content Type XML tag field.

The XML tag should not contain any spaces and must be unique. OCM stores this data in XML and uses it to present the content item.
6. Select a default stylesheet from the Search LOV.

Stylesheets enables you to preview the content item based on the stylesheet definition.
7. Optionally, to encrypt a URL, select the Encryption box.
8. Click **Continue**.

In the Create Content Type: *<content type name>*: Attributes page, the content type name and attributes are displayed with their order of display. You cannot modify the order.
9. To define extended and pull-down attributes, click **Add Another Row** in the respective regions.
 - The Field Length field defines the maximum number of characters that can be entered as a value for this attribute while creating content items.
 - The Default Value Updateable field indicates if the default value can be updated by the user while creating content items. To restrict users from updating the default value for this attribute, select No.
 - The Display Value field indicates the display priority. By default, the fields are displayed in a serial order.
10. In the Compound Content Type region:
 - Select a content type, which becomes the subitem of the compound content item.
 - Select a default content item from the Search LOV, which is displayed as a default subitem.
 - The Default Item Updateable field indicates if the default item can be updated by the user, while creating a content item.
11. Click **Submit**.

Setting Up Custom Attribute LOVs

While defining content type attributes, you can define custom lists of values (LOVs). For example, you can create custom LOVs for country, salutation, and so on.

Steps

1. Log in to the Oracle Applications login with Application Developer responsibility.
2. Create a custom value set.
3. Populate the value set.
4. Log into Content Manager.
5. Navigate to Content Types > Create Content Types.
6. Select Add Another Row from Pull Down List Attributes.
7. Populate the LOV Name field with your value set name.

Mapping Stylesheets to a Content Type

A stylesheet is a content type and tells the rendering engine how to display the content item on the Web. A stylesheet is like any other content type that can be selected to create a content item. You can create a content item using a content type of type stylesheet and store it in the content repository like another content item.

A stylesheet in OCM serves two purposes. Firstly, it defines how the content should be rendered on a Web site or any other device. Secondly, it enables you to preview a content item before it is released. Therefore, it is essential to map a content type to a stylesheet. Stylesheets must conform to the XSL format.

- OCM cannot display an item in context with other content items that are used to build Web pages. To display the contents on the Web page, all the contents that are used to build the page must be stored in OCM. This is the responsibility of the application that calls the content item.
- OCM only supports stylesheets that are of type Extensible Stylesheet Language (XSL).
- To create your own stylesheets, duplicate the seeded content types.

To map stylesheets to content types, log into Oracle Content Manager as the Content Super User.

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

Navigation: Content Type > Stylesheet Mapping.

Notes:

- Mapped Stylesheets region: All the stylesheets mapped to the content type are displayed in this region. The Default Stylesheet column indicates the default stylesheet. You can change the default stylesheet setting.
- To delete a stylesheet mapping, if you click the Delete icon, only the stylesheet is removed. But, the mapping is not deleted unless you click the Submit button.

Creating and Managing Content Type Groups

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

To create and manage Content Type Groups, log into Oracle Content Manager with the Content Super User responsibility.

Navigation: Content Types > Content Type Group.

Notes:

- When a content type group is inactive, all the content types in the group are not available to the users.

Mapping File Extensions to Content Types

The bulk upload feature enables you to map file extensions to content types. By using this feature, you can upload files to content types such as Image and File, which are seeded, and user defined file extensions. To enable files to map to user defined file extensions, you must map file extensions to content types.

Notes:

- You can map file extensions only to content types with the file attachments attributes.
- To check if a content type has file attachment attributes:
 1. Click the Content Type tab.
 2. Search for the content type by providing a content type name and click Go.
 3. In the results displayed, click the link for the content type under the column Content Type Name. This displays a content type read only page.

4. Search for "File Attachment" on the page displayed. If some attribute rows appear under the File Attachment table header, then the content type has attachment attributes defined.

Data Security Overview

A folder hierarchy can consist of subfolders and content items. This helps the content creators to organize the content in folders and subfolders.

Folders are associated with a set of meta-data and permissions. For more information on permissions, see

The IBC: Use Access Control (for data security) profile and the IBC: Default Home Folder (for setting home folder) profile enable security in OCM. They are essential for smooth functioning of OCM. By default, data security is enabled. The Content Super User must assign access control on the folders.

Access Control

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

Permissions

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

The permissions for a folder can be set at the following levels:

- Users - These are users who are defined in the FND APPLICATION as FND USERS
- Responsibility - The permission can be granted to APPS Responsibilities. When a user logs in, based on the user's login responsibility, the permissions are granted to the user.
- Groups - These are resource groups that have been defined as JTF RESOURCE GROUPS. A user logging into the application must belong to the group to inherit the group permissions.
- Global - Besides Users, Groups and Responsibility, permissions can also be granted at a Global level.

Table: Permissions List , page 4-8 lists the permissions that you can grant or revoke to a user.

Permissions List

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

Exclusions

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

Inheriting or Overriding Parent Access Control

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

You can create and manage a folder if you have Create Sub-Folder and Manage Folder permissions. In the Folder Properties page, the Access Control region displays the access control (Permissions and Exclusions) for a folder. While creating a folder, if you select the option to:

- Inherit parent access control, then the Permissions and Exclusions regions are disabled. This is the default selection. The subfolder inherits all the permissions from the parent folder. If you modify the parent folder access control, the subfolders also reflect the changes.
- Override parent access control, then the Permissions and Exclusions regions are enabled.

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

Guidelines for Assigning Permissions to Users

In an organization, for users to successfully manage their assigned roles, it is recommended to assign the permissions, explicitly along with the assigned role. For OCM to work smoothly, the corresponding recommended permissions must be granted. See the following table for details.

Recommended Permissions for the Roles in the Organization

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

Order of Priority for Access Control

The order of priority for access controls is listed below:

User settings override the Responsibility settings, Responsibility settings override Group settings, and Group settings override Global settings.

For a user, if the access controls conflict, then permissions override exclusions.

Setting Permissions and Exclusions for a Folder

When data security is enabled by setting the IBC: Use Access Control profile to Y, each user must be granted specific privileges that can be performed on each folder.

Understanding Access Control with a Scenario

In this scenario, it is assumed that the profile IBC: User Access Control is set to Y and the access control is with respect to the */Root/Common* folder. This scenario also illustrates that the User settings override the Responsibility settings, Responsibility settings override Group settings, and Group settings override Global settings. In case of

a conflict, permissions override exclusions.

In Table: Permissions and Exclusions for Manage Item, page 4-10, "P" indicates the permissions that are granted and "E" indicates the exclusions that are revoked for users with Manage Item permission.

Permissions and Exclusions for Manage Item

Type	Manage Item - Permissions and Exclusions
Global	P
User - John	P
User Harry	P
User - Scott	P
Group - Copyrighters	P
Responsibility - Content Creators	P
User - Nancy	E
Group - Contractors	E
Responsibility - Sales Reps	E

The Table: Access Control Granted to Users, page 4-10 lists the access controls details that are applicable for individuals, when they navigate to the */Root/Common* folder.

Access Control Granted to Users

User Name	Responsibility	Group	Manage Item	Notes
John	Media Manager	-	X	Granted through User Access
Mike	Content Creator	-	X	Granted through Responsibility Access

User Name	Responsibility	Group	Man age Item	Notes
Joseph	Media Manager	Copyrighters	X	Granted through Group Access
Harry	Media Manager	Contractors	X	Granted as User overrides Group
Scott	Sales Rep.	-	X	Granted as User overrides Responsibility
David	Content Creator	Contractors	X	Granted as Responsibility overrides Group
Terry	Media Manager	Copyrighters Contractors	X	Granted through group access. Although the permission for Copyrighters is granted and revoked for Contractions, the user still gets the access as permissions override exclusions
Jack	External Use	-	X	Granted through Group Access. Although Copyrighters are granted and Contractors are revoked, Jack still gets access as permission overrides exclusions.
Nancy	Media Manager	-	-	Revoked through exclusions. Although Global grant is for all users, Nancy is explicitly excluded.
Henry	Sales Rep.	-	-	Revoked through responsibility exclusions
Nicole	Marketing User	Contractors	-	Revoked through group exclusions.

The Table: Data Security Profiles, page 4-12 explains the data security profiles. You must set these profile options for content items to be created and submitted properly.

Data Security Profiles

Profile Name	Default Value	Comments
IBC: Use Access Control	Y	Now, the data security is enabled. When a user logs in, the application verifies to see if the user has appropriate permissions to perform an action.
IBC: Default Home Folder	/COMMON	Specifies the default home folder for the user.

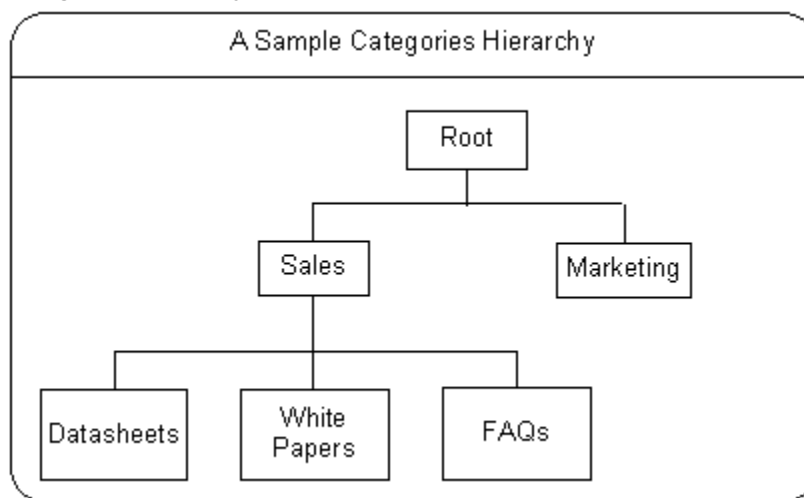
Understanding Categories

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

Root Category

The Root category is the highest level in the category hierarchy. The Root category is seeded, and any seeded category cannot be deleted or renamed. You can create a category under the Root category depending on the permissions you have. The following figure represents a sample categories hierarchy.

Categories Hierarchy



In the figure, Sales and Marketing are two categories under the Root category. Similarly, many such categories can exist under the Root category and subcategories under categories. Data sheets, White Papers, and FAQs are examples of subcategories under Sales.

Category Access Control

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

Permissions

Permissions for a category are granted at Users, Group, Responsibility, or Global levels. The following table lists the category permissions.

Category Permissions

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

Exclusions

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

Creating a Category and Setting Access Control

A category is a specifically defined classification, which is used to logically group a set of content items together. The Content Super User or an administrator must update the Root category for users to have Manage Category permission. Without this permission, no user will be able to create a subcategory under the Root category.

As an administrator, you can also assign content items to one or more categories. Only live versions of the content items can be assigned to the categories. Also, you can view, reject, or remove the content items from a category.

Managing Categories

You can perform the following tasks:

- Move a category. You can move a category and alter the category hierarchy. The

category being moved retains its original permissions.

- Delete a category with subcategories. To perform this you must have Manage Category permission on the parent category and subcategories. If a category is deleted, then all content item mappings to the category are deleted.
- Disable a category. By disabling a category, all its subcategories are disabled. A disabled category cannot be viewed in the library.
- Enable a category only if the parent category is enabled.

Oracle Content Manager Profile Options and Lookups

This appendix covers the following topics:

- Finding Responsibility ID Values
- Oracle CRM Technology Foundation (JTT) Profile Options
- Oracle Content Manager Profile Options
- Oracle Content Manager Lookups

Finding Responsibility ID Values

Before you set the required Oracle CRM Technology Foundation (JTT) profile options, you must know the values for APPLICATION_ID and RESPONSIBILITY_ID for Oracle iContent and IBC Super User responsibilities. To know the values log into Oracle Applications with the System Administrator responsibility.

Note: The APPLICATION_ID value for Oracle iContent is 549 (for Oracle iContent) and the RESPONSIBILITY_ID value for IBC Super User is 23812.

Oracle CRM Technology Foundation (JTT) Profile Options

This section summarizes the Oracle CRM Technology Foundation (JTT) profile options that you must set to implementing Oracle Content Manager.

Set the profile options in this section at the Site and Application levels.

Note: Choose Oracle iContent as the application.

The Table: JTT Profile Options for the Oracle Content Manager UI, page A-2 lists the

JTF profile options for the Oracle Content Manager UI.

JTF Profile Options for the Oracle Content Manager UI

Profile Option Name	Value	Description
JTF_PROFILE_DEFAULT_APPLICATION	549	Default application ID (549=Oracle iContent).
JTF_PROFILE_DEFAULT_CSS	jtfucss.css	Default Oracle CRM Technology Foundation Cascading stylesheet.
JTF_PROFILE_DEFAULT_CURRENCY	USD	Default currency. Enter the currency code in all uppercase letters.
JTF_PROFILE_DEFAULT_RESPONSIBILITY (application level only)	23812	Default responsibility ID (23812=IBC Super User).

FND Profile Option

The FND: Framework Compatibility Mode profile should be set to 12.0 at the application level "Oracle iContent".

Oracle Content Manager Profile Options

Table Profile Categories for Oracle Content Manager, page A-2 shows the categories for the profile options in Oracle Content Manager.

Profile Categories for Oracle Content Manager

Profile Category Functional Name	Profiles
Debug	IBC: Debug Output Directory
Debug	IBC: Debug Type
Debug	IBC: Enable Debug
Interaction	IBC: Content Type Group

Profile Category Functional Name	Profiles
Interaction	IBC: Customize Approval Workflow
Interaction	IBC: Default Home Folder
Interaction	IBC: Display Base Language
Management and Delivery	IBC: Enable Audit Log
Management and Delivery	IBC: Enforce Available Date
Management and Delivery	IBC: Enforce Expiration Date
Management and Delivery	IBC: Num for Copy Optimization
Security	IBC: Enable Encryption
Security	IBC: Encryption/Decryption Key
Security	IBC: Use Access Control

The Table: Oracle Content Manager Profile Options, page A-3, provides the profile options used by Oracle Content Manager.

Oracle Content Manager Profile Options

Profile Name	Description
IBC: Content Type Group	Use this profile to enable users to view only those content types to which they are mapped, in the Content Type Groups.
IBC: Customize Approval Work flow	Use this profile to customize the approval workflow. By default, the value is set to No. This means that if the content creator also has approval privileges on the folder, then no workflow is launched. But if you have customized the workflow and to launch it, then you must set the value to Yes.

Profile Name	Description
IBC: Debug Output Directory	Use this profile to set the directory where the debug log files must be created. To find the location, SELECT * from v\$parameter where name like 'utl_file_dir'.
IBC: Default Home Folder	Use this profile to set the Default Home folder for the user.
IBC: Debug Type	Use this profile to set the Content Manager Debug Type.
IBC: Display Base Lang	Use this profile to check whether to display the base language content item version, if the version status is not approved.
IBC: Enable Audit Log	Use this profile to enable Audit Log for Content Manager Application
IBC: Enable Debug	Use this profile to enable debug for Oracle Content Manager Application.
IBC: Enable Encryption	<p>OCM Runtime provides URL access to content item attachments and content items themselves with the capability of encrypting sensitive parameters in the OCM generated URLs.</p> <p>Set this profile value to Y to turn on the encryption.</p>
IBC: Encryption/Decryption Key	Use this profile to set the encryption/decryption key for Oracle Content Manager.
IBC: Enforce Available Date	Each content item created in OCM can be set to have an Available Date. If the profile value is set to Yes, then this feature is turned on.
IBC: Enforce Expiration Date	Each content item created in OCM can be set to have an Expiration Date. If the profile value is set to Yes, then this feature is turned on.

Profile Name	Description
IBC: Num for Copy Optimization	Use this profile in a Copy Folder operation to set when the operation is performed in real time versus by a concurrent program. The profile sets the value of x in the following cases. In the case when a folder has no folders within it, that is, a single-level folder, and contains x or fewer content items, then the request is done in real time. In the case when the folder contains subfolders or more than x content items, then the request uses a concurrent program. This profile has a default value of 5.
IBC: Use Access Control	<p>Use this profile to set the access control for OCM.</p> <p>If set to Yes, security is enabled. Security verification is made on the users access control.</p> <p>If set to No, security is disabled. No check is made on the users action.</p>
Upload File Size Limit	<p>Use this profile to specify the maximum size of a file that a user can upload.</p> <p>This profile is not specific to OCM but instead belongs to the Oracle Applications Framework.</p>

Oracle Content Manager Lookups

Lookups appear as drop-down values in the user interface. There are three types of lookups:

- **System** - You cannot modify or delete system lookups nor add more values.
- **Extensible** - You can add more values to extensible lookups. But seeded extensible lookups cannot be deleted.
- **User** - You can add or modify the user lookup values. But seeded user lookups cannot be modified or deleted.

Note: You can modify the lookup labels (the text displayed to the

user), for all type of lookups.

The Table: Oracle Content Manager Lookup Settings, page A-6 lists the OCM Lookup settings.

Oracle Content Manager Lookup Settings

Lookup Type	Lookup Values
IBC_ATTRIBUTE_DATA_TYPE	attachment
	boolean
	component
	dateTime
	decimal
	html
	string
	url
IBC_CITEM_PERMISSIONS	CITEM_READ
	CITEM_APPROVE
	CITEM_TRANSLATE
	CITEM_DELETE
	CITEM_ARCHIVE
	CITEM_EDIT
	CITEM_APPROVE_TRANSLATE
IBC_CITEM_STATUS	APPROVED
	ARCHIVED
	PENDING
	ARCHIVED-CASCADE

Lookup Type	Lookup Values
IBC_CITEM_VERSION_STATUS	APPROVED ARCHIVED INPROGRESS REJECTED SUBMITTED
IBC_CTYPE_STATUS	ACTIVE INACTIVE
IBC_DIRECTORY_PERMISSIONS	DIR_CITEM_ADD DIR_CREATE DIR_EDIT
IBC_IMAGE_TYPES	GIF JPEG JPG PNG
IBC_CL_ATTRIBUTE_CODES	IBC_CONTENT_BLOCK IBC_IMAGE
IBC_ACTIONS_LIST	COPY CREATE_NEW_VER LATEST_VER LOCK_ITEM PREVIEW_ITEM REMOVE UNLOCK_ITEM UPD_ANOTHER_VER UPD_TRANSLATIONS

Lookup Type	Lookup Values
IBC_ADV_SEARCH	IS
	IS_NOT
	CONTAINS
IBC_AUDIT_ACTIVITIES	MOVE
	UPDATE
	ARCHIVE
	REMOVE
	REJECT
	COPY
	CREATE
	APPROVE
	CREATE_NODE
	UPDATE_NODE
	UPDATE_NODE_SECURITY
IBC_AUDIT_OBJECTS	ASSOC
	ABUNDLE
	COMP
	CITEM
	LABEL
	CIVERSION
	CTYPE
	DIRNODE
IBC_CATEGORIES_BROWSE	ALL_CATEGORIES
	CURRENT_CATEGORY

Lookup Type	Lookup Values
IBC_CATEGORY_PERMISSIONS	PD_EDIT
	PD_PUBLISH
	PD_VIEW
IBC_CITEM_ACTIONS_LIST	COPY
	CREATE_NEW_VER
	LATEST_VER
	LOCK_ITEM
	PREVIEW_ITEM
	REMOVE
	UNLOCK_ITEM
	UPD_ANOTHER_VER
	UPD_TRANSLATIONS
IBC_CITEM_ACTION_LIST	IBC_CITEM_VIEW_ASSOCIATIONS
	IBC_CITEM_VIEW_HISTORY
	IBC_CITEM_VIEW_USAGE
	IBC_CITEM_VIEW_VERSIONS
IBC_CITEM_CONTAINS	ANYWHERE
	DESCRIPTION
	CONTENT_ITEM
IBC_CITEM_SEARCH_COLUMN	CONTENT_ITEM_NAME
	DESCRIPTION
IBC_CL_CHANNELS	IBC_EMAIL_CTG
	IBC_FAX_CTG
	IBC_PRINT_CTG
	ALL

Lookup Type	Lookup Values
IBC_CONTENTITEMS_ACTIONS_LIST	CREATE_NEW_VER
	LOCK_ITEM
	LATEST_VER
	UPD_TRANSLATIONS
	UNLOCK_ITEM
	COPY
	MOVE
	UPD_ANOTHER_VER
	PREVIEW_ITEM
	REMOVE
IBC_COPY_ERROR_ACTIONS	CREATE_NEW
IBC_CTG_SEEDED_STATUS	YES
	NO
IBC_CTG_STATUS	ACTIVE
	AB
	INACTIVE
IBC_CTYPE_SUMMARY_STATUS	ACTIVE
	ALL
	INACTIVE
	SEEDED
IBC_DEBUG_TYPES	PIPE
	FILE
IBC_DIRECTORY_NODE_STATUS	ACTIVE
	ARCHIVED
	INACTIVE

Lookup Type	Lookup Values
IBC_FOLDER_ACTIONS_LIST	COPY
	MOVE
	REMOVE
IBC_GRANTEE_TYPES	GROUP
	USER
	GLOBAL
	RESPONSIBILITY
IBC_INHERITANCE_STATUS	INHERIT
	OVERRIDE
IBC_NODE_TYPES	WDIR
	PDIR
IBC_OBJECT_PERMISSIONS	CITEM_APPROVE
	CITEM_APPROVE_TRANSLATE
	CITEM_ARCHIVE
	CITEM_READ
	CITEM_DELETE
	CITEM_EDIT
	CITEM_TRANSLATE
	DIR_CITEM_ADD
	DIR_CREATE
	DIR_EDIT
	PD_EDIT
	PD_VIEW
	PD_PUBLISH

Lookup Type	Lookup Values
IBC_PA_FILTER	ALL
	CONTENT_APPROVAL
	TRANSLATION_APPROVAL
IBC_PA_NOTIFICATIONS	IBC_CITEM_APPROVE_NOTIFICATION
	IBC_CITEM_TRANS_APPROVE_NOTIFY
IBC_READONLY_PAGES	ITEM_HISTORY
	ITEM_USAGE
	VIEW_VERSIONS

Lookup Type	Lookup Values
IBC_RENDITIONS	APPLICATION/MSEXCEL
	APPLICATION/VND.MS-EXCEL
	APPLICATION/X-JAVASCRIPT
	APPLICATION/X-MSEXCEL
	AUDIO/MPEG
	APPLICATION/POSTSCRIPT
	APPLICATION/VND.MS-POWERPOINT
	APPLICATION/X-TAR
	APPLICATION/VND.MSWORD
	APPLICATION/X-ZIP-COMPRESSED
	APPLICATION/MSWORD
	APPLICATION/RTF
	APPLICATION/PPT
	APPLICATION/PDF
	AUDIO/MIDI
	VIDEO/X-MSVIDEO
	VIDEO/X-AVI
	IMAGE/GIF
	TEXT/RICHTEXT
	AUDIO/X-REALAUDIO
	AUDIO/X-PN-REALAUDIO-PLUGIN
	AUDIO/X-PN-REALAUDIO
	TEXT/RTF
	IMAGE/PJPEG
IBC_SRCH	AFTER
	BEFORE
	Y

Lookup Type	Lookup Values
IBC_USER_GROUPS	GROUP
	USER
IBC_VERSIONS_CTG	LATEST_VERSION
	LIVE_VERSION
IBC_VIEW_OPTIONS	HIDE_FOLDERS
	SHOW_ALL
IBC_YES_NO	N
	Y
IBC_ZIP_TYPES	ZIPU
	ZIPL
IBC_RENDITIONS	VIDEO/QUICKTIME
	TEXT/PLAIN
	VIDEO/X-SGI-MOVIE
	VIDEO/MPEG
	TEXT/XML
	AUDIO/X-WAV
	UNKNOWN_MIME_TYPE
	TEXT/SGML
	IMAGE/JPEG
	TEXT/HTML
	IMAGE/BMP
	IMAGE/X-MS-BMP
	IMAGE/X-BMP
	TEXT/CSS

Seeded Information

This appendix covers the following topics:

- Seeded Content Types
- IBC_IMAGE
- IBC_STYLESHEET
- IBC_BASIC_CL
- IBC_CONTENT_BLOCK
- IBC_COVER_LETTER
- IBC_FILE
- IBC_IMAGE
- IBC_QUERY
- Oracle Content Manager Customer UI Responsibilities
- Seeded Responsibilities
- List of Concurrent Programs
- Online Help Targets
- Generic Online Help Page

Seeded Content Types

The seeded content types in OCM are described below:

IBC_IMAGE

Table: Attributes of IBC_IMAGE, page B-2 gives the seeded attributes for Content Type Image.

Attributes of IBC_IMAGE

Attribute Name	Data Type	Description
Alternate Text	String	When the image binary is not available, or when the browser cannot display the images, this text is displayed.
Image Attachment	Attachment	The image is a binary file.
Description	String	Description of the image.
Height	Decimal	Height of the image.
Link URL	URL	When the image is clicked, indicates to which URL the image is linked
Name	String	Name of the image.
Width	Decimal	Width of the image.

IBC_STYLESHEET

Table: Attributes of IBC_STYLESHEET, page B-2 gives the seeded attributes for Content Type Stylesheet. Use this information to define stylesheet items which are typically in XSL format that are used to render content items of a particular content type.

Attributes of IBC_STYLESHEET

Attribute Name	Data Type	Description
Attachment	Attachment	Stylesheet file attachment
Delivery Channel	String	Delivery channel this stylesheet is designed for. Values are WEB, FAX, EMAIL, WAP Device, and so on.
Description	String	Description of the stylesheet.

Attribute Name	Data Type	Description
Name	String	Name of the stylesheet.
Output Type	String	Indicates the output data format after applying the stylesheet to a content item. Available values are html, wml, text, and so on.

IBC_BASIC_CL

Table: Attributes of IBC_BASIC_CL, page B-3 gives the seeded attributes for Content Type Basic Cover Letter structure to be used to fulfillment the content.

Attributes of IBC_BASIC_CL

Attribute Name	Data Type Code	Description
ATTACHMENT	component	File attachments to be sent with the cover letter.
BODY_HTML	html	HTML content of the cover letter
BODY_TEXT	string	Text content of the cover letter
CBLOCK	component	Static content blocks to be appended to the cover letter content
DESCRIPTION	string	Description of the basic cover letter
NAME	string	Name of the basic cover letter
QUERY	component	Query associated with the cover letter

IBC_CONTENT_BLOCK

The Table: Attributes of IBC_CONTENT_BLOCK, page B-4 gives the seeded attributes for the Content Type Content Block Content Type.

Attributes of IBC_CONTENT_BLOCK

Attribute Name	Data Type Code	Description
DESCRIPTION	string	Description of the content block
HTML	html	HTML Type Data of the Content Block
NAME	string	Name of the content block
TEXT	string	Text Type Data of the Content Block

IBC_COVER_LETTER

The Table: Attributes of IBC_COVER_LETTER, page B-4 gives the seeded attributes for Content Type Fulfillment Cover Letter. Use this cover letter structure for fulfilling the content.

Attributes of IBC_COVER_LETTER

Attribute Name	Data Type Code	Description
ATTACHMENT	string	File attachments to be sent with the cover letter
BODY_HTML	html	HTML Content of the cover letter
BODY_TEXT	string	Text Content of the cover letter
CBLOCK	component	Static content blocks to be appended to the cover letter content
DESCRIPTION	string	Description of the cover letter
FOOTER_BLOCK	component	Footer Block of the cover letter
FOOTER_IMAGE	component	Footer Image of the cover letter
HEADER_BLOCK	component	Header Block of the cover letter

Attribute Name	Data Type Code	Description
HEADER_IMAGE	component	Header Image of the cover letter
NAME	string	Name of the cover letter
QUERY	component	Query associated with the cover letter

IBC_FILE

The Table: Attributes of IBC_FILE, page B-5 gives the seeded attributes for File Content Type.

Attributes of IBC_FILE

Attribute Name	Data Type Code	Description
ATTACHMENT	attachment	Attachment File ID
DESCRIPTION	string	File description
Name	string	File name

IBC_IMAGE

The Table: Attributes of IBC_IMAGE, page B-5 gives the seeded attributes for Image Content Type. The generic basic image attributes are defined in the Image content type.

Attributes of IBC_IMAGE

Attribute Name	Data Type Code	Description
ATTACHMENT	attachment	The attached image binary file.
DESCRIPTION	string	Description of image

Attribute Name	Data Type Code	Description
Name	string	Name of image
ALT_TEXT	string	Displays this text when the binary image is not available, or when the browser cannot display the image
Height	decimal	Height of the image
Link	URL	When the image is clicked, which URL to go to
WIDTH	Width	Width of the image

IBC_QUERY

The Table: Attributes of IBC_QUERY gives the seeded attributes for Query Content Type.

Attributes of IBC_QUERY

Attribute Name	Data Type Code	Description
IS_DATA_QUERY	boolean	Indicates if it is a data query
DESCRIPTION	string	Query description
Name	string	Query name
QTEXT	string	Complete query to be attached
QUERYID	attachment	FND ID of the file, which belongs to the query

Oracle Content Manager Customer UI Responsibilities

Oracle Content Manager provides security at two levels - Functional and Data Level.

- **Functional Level:** This controls the availability of tabs and enables certain functions

in the UI application. This section details the seeded responsibilities.

- **Data Level:** Enables OCM users to execute different tasks in the application. For more information on the data level security, see Section A.3, "Oracle Content Manager Profile Options", page A-2.

Seeded Responsibilities

The Table: Seeded Responsibilities, page B-7 lists the seeded responsibilities in OCM along with a brief description of each responsibility.

Seeded Responsibilities

Responsibility ID	Responsibility Name	Responsibility Key
23345	Oracle Content Manager	IBC_CONTENT_MANAGER
23810	Content Creator	IBC_CREATOR_KEY
23812	Content Super User	IBC_SUPER_USER_KEY
23814	Content User	IBC_USER_KEY
24782	Content Manager Self-Service Responsibility	IBC_SELF_SERVICE_RESP_KEY

List of Concurrent Programs

The procedure for running concurrent programs is the same for all Oracle applications. For a detailed description of the procedures, refer to the *Oracle E-Business Suite Setup Guide*.

The Table: Concurrent Programs lists the concurrent programs in OCM.

Concurrent Programs in Oracle Content Manager

Concurrent Program Name	Description
OCM InterMedia Index Optimizing operation for Attribute Bundle	Performs an iMT Sync check on all indexes across all IBC IMT-indexed columns.

Concurrent Program Name	Description
OCM InterMedia Index Synchronizing for Attribute Bundles	Performs an iMT Optimize check on all indexes across all IBC iMT-indexed columns in a time-distributed fashion.
BulkUploadCP	This is used to bulk upload content items and folders.
COPYFOLDERCP	This is used to copy folders.

- Oracle recommends that you run the concurrent program at least once in a day or more frequently depending on your business requirements.
- If you are uploading content items using Bulk Upload, then it is recommended that you run the InterMedia Search Index program to create indexes on newly created content items. Only after you run this concurrent program can you perform intermediate searches based on the attributes.

Online Help Targets

The following table shows the online help targets for pages in Oracle Content Manager. Use the targets in the help pages whose text you want to modify.

Online Help Targets for Oracle Content Manager

Page Name	Help Target	Description
Categories		
Categories	IBC_CATEGORIES_SUMMARY_PG	This is the summary page for categories. It can be used by administrator and user both to view categories.

Page Name	Help Target	Description
Category Details	IBC_CATEGORY_READONLY_PG	Read only page displaying details about the category. Used by user only while assigning content item to categories.
Create Category	IBC_CATEGORY_MAIN_PG	Main page used while creating category. Can be used by both user and administrator.
Move	IBC_MOVE_CATEGORIES_PG	Page used to rearrange categories. Used by administrator.
Content Type Groups		
Content Types Groups	IBC_CTG_SUMMARY_PG	Page used to view all existing content type groups. Used by administrator only.
Update	IBC_CTG_UPDATE_PG	Page used to create/update content type group. Used by administrator only.
Cover Letter		
Queries	IBC_QUERY_SUMMARY_PG	Displays summary about the query for a cover letter. Usage: administrator and user
Create Query	IBC_QUERY_CREATE_PG	Creating query required for cover letter having merge attributes. Usage: administrator and user.
Cover Letter Summary	IBC_COVER_LETTER_SUMMARY_PG	Listing existing cover letters and allows user to filter results using search options. Usage: administrator and user.
Query:	IBC_QUERY_DETAIL_PG	Displays details about the query for cover letter. Usage: administrator and user.

Page Name	Help Target	Description
Create Cover Letter	IBC_COVER_LETTER_EDIT_PG	Allows creation/update of generic cover letters. Usage: administrator and user
Cover Letter Details	IBC_COVER_LETTER_PRINT_PG	Allows creation/update of print type cover letters. Usage: administrator and user.
Create Cover Letter Content Type	IBC_CLETTER_CTYPE_CREATE_PG	Allow user to create/update existing cover letter content types. Usage: administrator.
Content Type Summary	IBC_CLETTER_CTYPE_SUMMARY_PG	Allow user to view existing cover letter content types. Usage: mostly administrator.
Library		
Content Library	IBC_LIBRARY_PG	Allow use to see the contents existing in the categories. Usage: user.
Advanced Search	IBC_LIBRARY_SRCH_PG	Allow users to search contents existing in the categories. Usage: user.
Content Type		
Content Type Details Page	IBC_CTYPE_DETAILS	Shows details of any given content type. Usage: administrator.
Content Type summary page	IBC_CTYPE_SUMMARY	List all content types. Usage: administrator.
Create Content Type	IBC_CTYPE_CREATE1	Page 1 for create content type screen.
Stylesheet Mappings	IBC_CTYPE_STYLESHEET_MAPPING	Screen for mapping style sheets to content type. Usage: administrator.

Page Name	Help Target	Description
Create Content Type	IBC_CTYPE_CREATE2	Page 2 for create content type screen.
Map File Extensions	IBC_FILE_EXTN_MAPPING_PG	Page to map content type to file extensions. Usage: administrator.
Content > My Content		
Item Usage	IBC_ITEM_USAGE_PG	Provide where an item is used. Usage: user.
Bulk Upload	IBC_BULK_UPLOAD_PG	Item creation using Bulk Upload. Usage: user.
Quick Create	IBC_CITEM_QUICK_CREATE_PG	Allows a user to quickly create items. Used mainly in compound content items. Usage: user.
Create Item	IBC_CITEM_CRE_SEC_PG	For creating a content item.
My Content	IBC_MY_CONTENT_SUMMARY_PG	Summary screen for contents that are accessible to users. Usage: user.
Version History	IBC_UPDATE_ANOTHER_VERSION_PG	Allows users to select and update a different version then the current one. Usage: user.
Copy	IBC_COPY_ERROR_PG	Displays an error message for copy operations. Usage: user.
Create Item	IBC_CITEM_CRE_FIRST_PG	First page for create content item UI. Usage: user.
Copy	IBC_COPY_FOLDER_PG	Copy Folder page. Usage: user.
Browse Items	IBC_BROWSE_ITEMS_PG	Browse Items page. Usage: user.
Bulk Upload: Review	IBC_BULK_DISPLAY_PG	Second page of Bulk Upload flow. Allows a user to review options. Usage: user.

Page Name	Help Target	Description
Copy	IBC_COPY_ITEM_PG	Copy Content Item page. Usage: user.
Version History:	IBC_VIEW_VERSIONS_PG	Shows version history of a content item. Usage.: user.
Item History:	IBC_ITEM_HISTORY_PG	Allow a user to view history of content item. Usage: user.
Move	IBC_COPY_ITEM_PG	Copy item page. Usage: user.
Move	IBC_MOVE_FOLDER_PG	Copy folder page. Usage: user.
Translate:	IBC_TRANSLATION_PG	Page to translate content item.
Translation History	IBC_TRANSLATION_HISTORY_PG	Translation history page. Usage: user.
Quick Translate:	IBC_QUICK_TRANSLATE_PG	Quick translate page: Usage: user.
Folder Properties	IBC_DIRECTORY_NODES_PG	Shows folder properties of a folder. Usage: user and administrator.
Workgroup Folder Permissions	IBC_FOLDER_PERMISSIONS	Shows permissions of a folder. Usage: user and administrator.
	IBC_ATYPE_SUMMARY	To search association for content item. Usage: user.
Create Association Type	IBC_ATYPE_CREATE	To add an association for a content item. Usage: user.
Quick Create	IBC_Quick_Upload	To quick upload an item. Usage: user.
Content Item Details	IBC_CONTENT_ITEM_DTL_PG	Content item details page. Usage: user.
Click-Through-Destination	IBC_CTD_PG	Click through destination in Rich Text editor.

Page Name	Help Target	Description
Upload Image	IBC_IMAGE_UPLOAD_PG	Uploading image.
Content > Pending Approval		
Pending Approvals	IBC_PENDING_APPROVALS_PG	List item under needing approvals. Usage: user.
Pending Approvals: Comments	IBC_REJECTION_COMMENTS_PG	Rejection comments for items. Usage: user.
Approver Comments	IBC_APPROVER_COMMENTS_PG	Approval comments for items. Usage: user.
Content > Trash		
Trash	IBC_TRASH_OVERVIEW_PG	Trash page: Usage: user.

Generic Online Help Page

Due to self-explanatory or highly configurable user interfaces in Oracle Content Manager, the application provides no PDF book or online help for end users. The application also provides no documentation for other self-explanatory pages. Consequently, all help calls for such pages go to a single generic page that contains this text. Customers can customize online help for these pages by using the table of online help targets in the *Oracle Content Manager Implementation and Administration Guide*.

Content Item XML Formats

This appendix covers the following topics:

- XML Format Overview
- Regular Expressions
- An XML Example for Content Item

XML Format Overview

You must understand the XML formats of OCM content items to create a correct XSL stylesheet.

Regular Expressions

The following regular expressions give the formal description of the XML format of OCM content items.

Content Item XML ::=

```
{ Content Item Open Tag },
{ Attachment Attribute }?,
{ Primitive Attribute }*,
{ Component Item Attribute Reference }*,
{ Component Item Attribute }*,
{ Content Item End Tag }
```

Content Item Open Tag ::=

```
<CONTENT_TYPE_CODE datatype="citem" id="content_item_id"
version="version_number"
available="available_date" expiration="expiration_date"
ircode="item_reference_code" ref="f"
url="ibcGetContentItem.jsp?cItemId=content_item_id">
```

Content Item End Tag ::=

```

</CONTENT_TYPE_CODE>

Attachment Attribute ::=

<ATTACHMENT_ATTRIBUTE_TYPE_CODE datatype="attachment"
id="attachment_file_id"

ref="t" file="attachment_file_name" mimeType="attachment_mime_type"

renditionName="rendition_name" defaultMimeType="t"
url="ibcGetAttachment.jsp?fileId=attachment_file_id" />

Primitive Attribute ::=

{ Primitive String Attribute } | { Primitive Number Attribute } | {
Primitive Date Attribute } |

{ Primitive Boolean Attribute } | { Primitive HTML Attribute } | {
Primitive URL Attribute }

Primitive String Attribute ::=

<TEXT_ATTRIBUTE_TYPE_CODE datatype="string">

string value

</TEXT_ATTRIBUTE_TYPE_CODE>

Primitive Number Attribute ::=

<NUMBER_ATTRIBUTE_TYPE_CODE datatype="decimal">

number value

</NUMBER_ATTRIBUTE_TYPE_CODE>

Primitive Date Attribute ::=

<DATE_ATTRIBUTE_TYPE_CODE datatype="dateTime">

date value

</DATE_ATTRIBUTE_TYPE_CODE>

Primitive Boolean Attribute ::=

<BOOLEAN_ATTRIBUTE_TYPE_CODE datatype="boolean">

boolean value

</BOOLEAN_ATTRIBUTE_TYPE_CODE>

Primitive HTML Attribute ::=

<HTML_ATTRIBUTE_TYPE_CODE datatype="html">

html value

</HTML_ATTRIBUTE_TYPE_CODE>

Primitive URL Attribute ::=

<URL_ATTRIBUTE_TYPE_CODE datatype="url">

url value

</URL_ATTRIBUTE_TYPE_CODE>

Component Item Attribute Reference ::=

<COMPONENT_ATTRIBUTE_TYPE_CODE datatype="component"
id="component_item_id"

ref="t" url="ibcGetContentItem.jsp?cItemId=component_item_id" />

Component Item Attribute ::=

```

```

{ Component Item Attribute Open Tag},
{ Content Item XML },
{ Component Item Attribute End Tag }

Component Item Attribute Open Tag ::=
<COMPONENT_ATTRIBUTE_TYPE_CODE datatype="component"
id="component_item_id"

ref="f" url="ibcGetContentItem.jsp?cItemId=component_item_id" >

Component Item Attribute End Tag ::=
</COMPONENT_ATTRIBUTE_TYPE_CODE>

```

An XML Example for Content Item

```

<WHITEPAPER datatype="citem" id="10017" version="2"
available="2002-05-01"

expiration="2003-05-01" ircode="WP123" ref="f"
url="ibcGetContentItem.jsp?cItemId=10017">

<!-- Attachment Attribute -->

<WP_ATTACHMENT datatype="attachment" id="24357" ref="t" file="wp123.pdf"
mimeType="application/pdf" renditionName="PDF" defaultMimeType="t"
url="ibcGetAttachment.jsp?fileId=24357" />

<!-- Primitive Attributes -->

<NAME datatype="string">Oracle 9i</NAME>

<DESCRIPTION datatype="string">Oracle 9i Description</DESCRIPTION>

<PUBLISH_DATE datatype="dateTime">27-DEC-01 17:24:18 PST</PUBLISH_DATE>

<RELEASED datatype="boolean">T</RELEASED>

<PRODUCT_ID datatype="decimal">1234567</PRODUCT_ID>
  <!-- Component Item Attribute Expanded -->

<WP_IMAGE datatype="component" id="10003" ref="f"
url="ibcGetContentItem.jsp?cItemId=10003">

<IMAGE datatype="citem" id="10003" version="9" available=""
expiration=""

ircode="WPIMAGE123" ref="f" url="ibcGetContentItem.jsp?cItemId=10003">

<IMAGE_FILE datatype="attachment" id="24358" ref="t" file="image123.gif"
mimeType="image/gif" renditionName="GIF" defaultMimeType="t"
url="ibcGetAttachment.jsp?cItemId=24358" />

<NAME datatype="string">Image</NAME>

<DESCRIPTION datatype="string">Image Description</DESCRIPTION>

<AUTHOR datatype="string">Test Author</AUTHOR>

</IMAGE>

</WP_IMAGE>

</WHITEPAPER>

```

Glossary

Access Control

Access control is a combination of permissions and exclusions.

Association

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

Attachment

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

Attribute

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

Bulk Upload

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

Category

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

Collateral Content

Collateral can be defined as electronic marketing materials that are fulfilled to the target customers through automated processes such as print, fax, and so on. The automated processes of fulfillment can be through the channels of e-mail, fax, print, or Web

channels. Collaterals are always outbound and the intended recipients are the target audience. Collateral consists of cover letters or attachments.

Compound Content Item

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

Compound Content Types

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

Content

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

Content Item

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

Content Type

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

Content Type Group

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

Content Type Template

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

Cover Letter

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

Current Folder

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

E-Business Suite Objects

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

Exclusions

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

File Attachment

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

Folder

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

Home Folder

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

Library

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

Live Version

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

Permissions

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

Renditions

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

Seeded Content Items

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

Seeded Content Types

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

Stylesheets

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

Subitems

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

Translation

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

Versioning

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

Workflow

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

Index

A

- access control
 - category, 4-13
- APPLICATION_ID, A-
- APPLICATION_IDresponsibility ID finding values, A-1
- assigning
 - AOL responsibilities, 2-2
 - folder permission, 4-7

C

- categories hierarchy, 4-12
- category, 4-12
- category access controls
 - exclusions, 4-13
 - permissions, 4-13
- concurrent manager, 2-3
- concurrent program
 - BulkUploadCP, B-8
 - COPYFOLDERCP, B-8
 - OCM InterMedia Index Optimizing operation for Attribute Bundle, B-7
 - OCM InterMedia Index Synchronizing for Attribute Bundles, B-8
- content manager
 - key features, 1-1
 - overview, 1-1
- content type
 - understanding, 4-1
- creating workflow notifications, 2-3
- current date, 2-2

E

- end date, 2-2

F

- finding responsibility ID values, A-1
- FND User, 2-3
- Folder Properties page, 4-8
- folder security, 4-9

I

- IBC_ROOT_MENU, 3-2
- implementation task sequence, 3-1

J

- JTF profiles
 - JTF_PROFILE_DEFAULT_APPLICATION, A-2
 - JTF_PROFILE_DEFAULT_CSS, A-2
 - JTF_PROFILE_DEFAULT_CURRENCY, A-2
 - JTF_PROFILE_DEFAULT_RESPONSIBILITY, A-2

L

- lookups, A-5

M

- mapping stylesheets, 4-5

O

- OA Framework, 3-4
- OCM Customer UI Responsibilities
 - data level, B-7
 - functional level, B-7
- Oracle Application (OA) Framework, 2-1
- Oracle CRM Technology Foundation, 2-1
- overview
 - categories, 4-12
 - content type, 4-1
 - Oracle Content Manager, 1-1
 - XML Format, C-1

P

- parent access control, 4-8
 - guidelines, 4-9
 - inheriting, 4-8
 - overriding, 4-8
- Permissions and Exclusions regions, 4-8
- Personal Home Page, 2-2
- PL/SQL, 3-6
- profile
 - IBC: Content Type Group, A-3
 - IBC: Debug Output Directory, A-4
 - IBC: Debug Type, A-4
 - IBC: Default Home Folder, A-4
 - IBC: Display Base Lang, A-4
 - IBC: Enable Audit Log, A-4
 - IBC: Enable Debug, A-4
 - IBC: Enable Encryption, A-4
 - IBC: Enforce Available Date, A-4
 - IBC: Enforce Expiration Date, A-4
 - IBC: Use Access Control, A-3, A-5
 - IBC: Use Control, 3-3
- Profile Options
 - Oracle CRM Technology Foundation (JTT), A-1
- profiles
 - JTT, A-1
 - OCM, A-2

R

- Responsibilities subtab, 2-2
- responsibility
 - System Administrator, 2-2, 2-2
- root category, 4-12

S

- seeded content types
 - IBC_BASIC_CL, B-3
 - IBC_CONTENT_BLOCK, B-3
 - IBC_COVER_LETTER, B-4
 - IBC_FILE, B-5
 - IBC_IMAGE, B-1, B-5
 - IBC_QUERY, B-6
 - IBC_STYLESHEET, B-2
- seeded responsibilities, B-7
- setting
 - session timeouts, 3-4
- setting JTT profiles, A-1
- simple attributes
 - Attachments, 4-1
 - Extended, 4-1
 - Pull-down, 4-1
- stylesheet mapping, 4-5

T

- types of lookups
 - Extensible, A-5
 - System, A-5
 - user, A-5

U

- user
 - create, 2-2
 - find, 2-2

X

- XML
 - example for content item, C-3
 - regular expression formats, C-1